# Conversation Guide: Pre-Need Eligibility Determination Application (VA Form 40-10007), Usability Research of Integration Enhancements, August 2023

P10

## Warm-up Questions - 5 minutes

* To start, I'd like to ask you a few warm-up questions.
* Can you briefly tell me about your background with the military? [Determine if they're a Veteran, family member, or a personal representative]
  + My husband was in the military, he was in the Navy
* Did you know that you could apply to see if you're eligible to be buried in a national cemetery? - If so, how did you find out?
* What do you think qualifies you to be buried in a national cemetery? I’m a veteran of a foreign war
* When thinking about planning for your burial, would you prefer to be buried in a national cemetery? Pretty much up to my wife. Its okay.
* Have you applied before to see if you're eligible for burial in a national cemetery?
* If Yes: Could you describe how that process went and your thoughts about it?
* If No: Is that something you would be interested in doing at some point?

## Task 3: Applying for Someone Else - Applicant is a Veteran - 20 minutes

* **Scenario:** For your scenario, pretend that you are Sammy Smith. You are filling out the form on behalf of Robin Smith, who is a Veteran. You want to help Robin plan for the future and apply for them to see if they're eligible for burial in a VA national cemetery. How would you go about filling out this application? In this example, you are already signed in to VA.gov. I'm going to briefly have you take a look at this information page before you start the application.

*When participant clicks on the green button to apply, repeat the scenario:*

*“Seems pretty straightforward.”*

*Would select the external link to find out how to schedule a burial.*

*“oh. I didn’t even know they had state veterans so I would definitely click on that!”*

*“ I think I could do this pretty much on my own”*

* **Scenario:** I'll repeat the scenario again: Pretend that you are Sammy Smith. You are filling out the form on behalf of Robin Smith, who is a Veteran. You want to help Robin plan for the future and apply for them to see if they're eligible for burial in a VA national cemetery. How would you go about filling out this application? In this example, you are already signed in to VA.gov.

### Questions to ask as they go through scenario

* **Introduction**
* What are your thoughts regarding the content on this page?
* Do you feel prepared to start applying? “Yeah. Im pretty good about applying online but sometimes it confuses me when I apply online.” “If I get desperate I would just mail it.”
* *Things to watch for:*
* Does the user feel the need to click on external links? Yes
* Does the user try to open the Privacy Act Statement before continuing?\_
* **Step 1 of 7: Preparer information**
* **Applying for self or someone else**
* *Things to watch for:*
* Observe if user has difficulty answering applying for self or someone else field (should select Applying for Someone Else)
  + Yes there was confusion. “Am I robin? Robin is the veteran.” “Then I would apply for someone else.”
* Does the user feel the need to open the additional info component? Yes. “Then I would click on what to know if you are applying for someone else” link
* If they have difficulty, could ask: What are you leaning towards selecting here? Why?
* **Preparer details**
* Whose name do you think would need to be noted here? Their name. (incorrectly stated that this would be the applicants name.) “I am getting the names confused.”
* *Things to watch for:*
* Do they understand they would need to provide their details here as the preparer (Sammy Smith)?
* **Preparer's mailing address/contact details**
* *Things to watch for:*
* Do they understand they would need to provide their details here as the preparer?
* “I would click on why do we need contact details” p10 likes to get the whole picture.
* **Step 2 of 6: Applicant information**
* **Applicant relationship to service member / Veteran**
* What do you think this question is asking?
* What are your thoughts regarding the available options?
  + “I would open it up and check.” (external links.)
* *Things to watch for:*
* Does the user feel the need to open the additional info component? Yes
* Does the user experience any confusion in reading details? (Need to scroll to bottom of page)\_Yes. “this just gives you definitions, there isn’t anything to choose.”
* **Applicant details**
* *Things to watch for:*
* Do they understand they would need to provide the applicant details here (Robin Smith)? Yes, no confusion here.
* Does the user show any confusion with two new birth fields? No. “Yeah It would be where he was born.”
* **Applicant's mailing address**
* *Things to watch for:*
* How do users react with applicant address/contact page being moved to this new location? “So is the applicant … I’m filling it out for him so im the applicant, right?”
* **Applicant demographics**
* Do you have any thoughts regarding the questions and options available here? “Well some people prefer not to … like if it’s a gay couple they may not be comfortable letting other people know. People like me, I wouldn’t have any problem answering.” “I like It that way. Ive had questions where neither one of them were right, so you leave the quadrium for people who would say that none of the options are right.”
* Is there anything you would change? No.
* *Things to watch for:*
* How do users react to answering potentially sensitive questions? No issues.
* How do they approach Other Category Comment field? No problem or comment.
* **Step 3 of 6: Applicant military history**
* **Military details**
* Are you familiar with the military status dropdown options?
  + “No because I know his social. I wouldn’t know his service number. I wouldn’t remember that.”
* Would you know what to provide for these fields? If not, how would you get that information? “I would ask help from a service officer. “
* **Service periods**
* Would you feel prepared to answer these questions or would you need to look them up? Yes
* What would you do if you didn't have this information on hand? “I would have difficulty with that one without him being here.”
* For the discharge character of service options, are you familiar with those? Yes
* *Things to watch for:*
* Would they be able to add multiple service periods?
* **Previous name** -*Have them select YES*
* *Things to watch for:*
* Do they understand what this field is asking?
  + “Yeah they want to know what is real first name is.”
  + “That is not required so I would continue.”
    - Participant wouldn’t fill in fields that weren’t required.
* **Step 4 of 6: Burial benefits**
* **Previous Decedents**
* Would you understand what this question is asking? Not totally. “Its asking if there is anyone buried with the same name?”
* *Have them select YES*
* If they don't understand: Is there a different way you would ask it?
* *Things to watch for:*
* Do they understand what this field is asking?
  + “I would assume it would be the first name as Robin? Sammy? “
* **Desired cemetery**
* Do you have something in mind for where you'd like to be buried? Yes
* If they don't: How would you go about finding a cemetery?
  + Participant read the please note section and would want to look at other cemeteries around where she lives. She would click on the external link.
* *Things to watch for:*
* Does the language in the note make sense to them or do they express any concerns?
* **Step 5 of 6: Supporting files**
* **Upload supporting files**
* Do you think you would need to upload something here to continue? No.
* Can I mail or fax files? Because im not good at uploading ..”
* What do you think you could provide to help your application process? I don’t think so.
* How would you go about uploading a file if you're on a mobile device? I would have to check out my mobile device to see if it … then I would have to do a PDF. I’d have to call for help.”
* What are your thoughts regarding the allowed file type for PDFs?
* **Step 6 of 6: Review application**
* **Confirmation**
* What would you do at this point? I would open all of them. I said I was going to send it by mail. If I wasn’t sending it by mail, I would submit the application.
* When do you think you would get a decision?
* Is there anything that would be helpful to see at this point once you've submitted
* *Have them click After You Apply link*
* **After you apply**
* *Have them briefly look at page to get their thoughts*

## TPost-Task Interview - 5-10 minutes

Wonderful! Thank you so much for walking through that with us and telling us your thoughts. We just have a few questions to ask before we wrap up our session for today.

* What did you think of the application process overall?
* On a scale of 1 to 5 with 1 being the lowest and 5 being the highest, how would you rate the application process for Pre-Need that you just experienced?
* On a scale of 1 to 5, how mobile-friendly do you think it is?
* If you could snap your fingers and recreate the application process for pre-need to make it better, what would that process look like?
* How would you do things differently?
* Is there anything else on your mind that we didn't ask?
* I'm going to ask my colleage [Charlie or Cindy] if they have questions at this time **Only if there are observers:** and also check the channel to see if any of our observers have any questions. [Check Teams chat for questions]
* Do you have any questions for me?