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

## P2

## 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]
  + “I have none. I am married to a navy vet.”
* 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?
  + Yes. Presentation from my attorney. My estate planning attorney.”
* What do you think qualifies you to be buried in a national cemetery?
  + Married to a navy vet
* When thinking about planning for your burial, would you prefer to be buried in a national cemetery?
  + Yes
* 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 2: Applying for Self - Applicant is a non-Veteran - 15 minutes

* **Scenario:** For your scenario, pretend that you are Robin Smith. You are married to a Veteran. You want to plan for the future and apply for yourself to see if you're eligible for burial in a VA national cemetery. Your spouse is sponsoring your benefits. How would you go about filling out this application for yourself? 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:*

* **Scenario:** I'll repeat the scenario again: Pretend that you are Robin Smith. You are married to a Veteran. You want to plan for the future and apply for yourself to see if you're eligible for burial in a VA national cemetery. Your spouse is sponsoring your benefits. How would you go about filling out this application for yourself? In this example, you are already signed in to VA.gov.

### Questions to ask as they go through scenario

* **Introduction**
  + Participant took plenty of time to read and scroll through the introduction page.
* What are your thoughts regarding the content on this page?
  + “So that’s where I go to fill out the form I presume”
* Do you feel prepared to start applying?
  + “SO I gather my social security , I have a copy of the DD2 and im pretty much good to go.”
* *Things to watch for:*
* Does the user feel the need to click on external links? No
* Does the user try to open the Privacy Act Statement before continuing?\_No
* **Step 1 of 7: Preparer information**
* *Things to watch for:*
* Observe if user has difficulty answering applying for self or someone else field (should select Applying for Self)
* Does the user feel the need to open the additional info component? No
* If they have difficulty, could ask: What are you leaning towards selecting here? Why?
* **Step 2 of 7: Applicant information**
* **Applicant relationship to service member / Veteran**
* What do you think this question is asking?
  + My relationship to the veteran makes me eligible.
* What are your thoughts regarding the available options? (should select Wife)
  + They seem to be good.
* *Things to watch for:*
* Does the user feel the need to open the additional info component? No
* Does the user experience any confusion in reading details? (Need to scroll to bottom of page)\_Information was clear
* **Applicant details**
* *Things to watch for:*
* Do they understand they would need to provide their details here (Robin Smith)?
* Does the user show any confusion with two new birth fields? No
* **Applicant's mailing address**
* *Things to watch for:*
* How do users react with applicant address/contact page being moved to this new location? “Yeah seems logical to me!” Easy to understand going through. Phone number sometimes when its 10 digits its confusing so maybe ask what the format is so that it accepts it on the first pass. Maybe fill in the dashes. When it bounces you know to go back until it accepts it. “I like that it saves your application after each page.”
* **Step 3 of 7: Sponsor information**
* **Sponsor details**
* What are your thoughts regarding whose details you'll need to provide here?
  + “No problems. Im mean if im a spouse and im married so I would know the social security details.”
* **Sponsor's mailing address/contact details**
* *Things to watch for:*
* How do users react with sponsor address/contact page being moved to this new location? “Its all logical. It makes sense.” “If it’s a spouse, why doesn’t it auto-populate with the same address?”
* **Sponsor demographics**
* Do you have any thoughts regarding the questions and options available here?
  + I guess im not aware that as a divorced person I would be eligible to be buried based on a previous marriage. I guess I would have to read the fine print to figure that one out.”
* Is there anything you would change? “Theyre pretty basic when you fill out all these forms. They want to know your ethnicity for statistical purposes.”
* *Things to watch for:*
* How do users react to answering potentially sensitive questions?
* How do they approach Other Category Comment field?
* **Sponsor's passing**
* *Things to watch for:*
* How do users react to answering potentially sensitive questions?
  + “No I wouldn’t say this evokes additional grief .. its just standard stuff.”
* **Step 4 of 7: Sponsor military history**
* **Sponsor's military details**
* Are you familiar with the military status dropdown options?
* Would you know what to provide for these fields? If not, how would you get that information?
  + “If I had a copy of the DD214 so yeah that’s not a problem. The claim number I don’t know. That’s not been issued on this form? I wouldn’t know the claim number.”
* **Sponsor's service periods**
* Would you feel prepared to answer these questions about your sponsor or would you need to look them up? “Yep its on the DD214 that’s not a problem.”
* What would you do if you didn't have this information on hand?
* For the discharge character of service options, are you familiar with those?
* *Things to watch for:*
* Would they be able to add multiple service periods for their sponsor?
  + “are you talking about reserve status? It needs to have clarification about another service period.” “You would probably need to clarify the duty date as reserved or active status.”
* **Sponsor's previous name** -*Have them select YES*
* *Things to watch for:*
* Do they understand what this field is asking?
* **Step 5 of 7: Burial benefits**
* **Previous Decedents**
* Would you understand what this question is asking about your sponsor?
  + Yes has he sponsored anyone else to be buried .. I guess a previous wife or dependent child …”
* *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?
* **Desired cemetery**
* Do you have something in mind for where you'd like to be buried?
  + Yep Great Lakes in Holly Michigan
* If they don't: How would you go about finding a cemetery?
  + “Maybe I can free text type it in? Cause it doesn’t look like its in the drop down menu.”
* *Things to watch for:*
* Does the language in the note make sense to them or do they express any concerns?
* **Step 6 of 7: Supporting files**
* **Upload supporting files**
* Do you think you would need to upload something here to continue?
  + “Yeah because you need proof that I am eligible.”
* What do you think you could provide to help your application process?
  + “ I can upload the DD214 and a copy of the marriage certificate.”
* How would you go about uploading a file if you're on a mobile device?
  + “I could take a picture and put it in , I could go in my one drive and attach a scanned document..”
* What are your thoughts regarding the allowed file type for PDFs?
  + I don’t have a problem with it, its mostly what stuff is being saved as. Quite frankly I don’t know what that means. Why would I use that when it automatically saves? Most of the time I agree on the default settings.”
* **Step 7 of 7: Review application**
* What would you do at this point? “So I can expand these to make sure I can see what I put in and agree with all that”   
  I’m comfortable with my answers so im not needing to look at them … I would read the privacy thing and accept here … Like what youre doing most of the time you blow by it and just click the box to be perfectly frank.”
* **Confirmation**
* What would you do at this point?
  + “Id print the page since it has the confirmation number if I wanted to go back and access it.”
* When do you think you would get a decision?
  + “4-6 weeks.”
* Is there anything that would be helpful to see at this point once you've submitted
  + I don’t remember anywhere for a contact me or mail or anything ..did I put my email in there at the top? Just so that the people could get back to me if they had questions. I think I put my contact stuff in there.”
* *Have them click After You Apply link*
* **After you apply**
* *Have them briefly look at page to get their thoughts*

## Post-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?
  + “Pretty easy, pretty straightforward, self explanatory.”
* 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?
  + 5
* On a scale of 1 to 5, how mobile-friendly do you think it is?
  + 5
* If you could snap your fingers and recreate the application process for pre-need to make it better, what would that process look like?
  + I don’t know that id make any changes .. its pretty good. A couple service period dates whether your’e including reserved or active duty and formatting and the phone number but its good.”
* How would you do things differently?
* Is there anything else on your mind that we didn't ask?
* I'm going to ask my colleague [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?

Didn’t need any further explanation.