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

## P4

## 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 joined the military in 1985. Combat support hospital and fought in the military EMT program.
* 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 – Samuel Cottes he gives webinars and works in the Staten Island vet center related to veteran services.
* What do you think qualifies you to be buried in a national cemetery?
  + Having served and been honorably discharged
* When thinking about planning for your burial, would you prefer to be buried in a national cemetery?
  + Yes in a national cemetery
* Have you applied before to see if you're eligible for burial in a national cemetery?
  + I have applied
* If Yes: Could you describe how that process went and your thoughts about it?
  + “It was a logistical nightmare trying to decipher the form but I persevered and I have my certificate .. 5 years ago ago”
* If No: Is that something you would be interested in doing at some point?
* **Scenario:** I'll repeat the scenario again: Pretend that you are Sammy Smith, a Veteran, and that you want to plan for the future and find out if you'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?
  + Participant started reading but started scrolling through faster.
  + “It doesn’t apply to Arlington , it used to apply to Arlington.” “I was a little confused about the first part find out if you are eligible.” “Why does is start out with what is not instead of saying what is. I would like to see the positive before the negative.”
* Do you feel prepared to start applying? “I would have the DD214 and social security card”
* *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? Yes
* **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)
* “If I didn’t have a military background, would I know where do I click .. the VSO link? I don’t know if other types of applicants would use a VSO.” Participant would want to click that link.
* Does the user feel the need to open the additional info component? Yes
* If they have difficulty, could ask: What are you leaning towards selecting here?
* **Step 2 of 6: Applicant information**
* **Applicant relationship to service member / Veteran**
* What do you think this question is asking?
  + “Applicant details - would that mean veteran details?”
* What are your thoughts regarding the available options? (should select applicant is a Veteran)
  + “I think I guess if I were filling it out on behalf of someone else, I would use other.” “If I was a friend of Sammys then that’s not an option here.” “What if I’m a domestic partner and technically not a wife or husband? But I could be the applicant.”
* *Things to watch for:*
* Does the user feel the need to open the additional info component?
* Does the user experience any confusion in reading details? (Need to scroll to bottom of page)\_
* **Applicant details**
* *Things to watch for:*
* Does the user show any confusion with two new birth fields?
  + Did not fill in required space until prompted
* **Applicant's mailing address**
* *Things to watch for:*
* How do users react with applicant address/contact page being moved to this new location?
* **Applicant demographics**
* Do you have any thoughts regarding the questions and options available here?
  + “No I think that would capture everyone unless we get into the he she they “
* Is there anything you would change?
  + “What statistical purposes?”
* *Things to watch for:*
* How do users react to answering potentially sensitive questions?
  + “I thought it was okay.”
* How do they approach Other Category Comment field?
  + I would put in “unknown” if I chose other, but this captures the majority.
* **Step 3 of 6: Applicant military history**
* **Military details**
* Are you familiar with the military status dropdown options?
  + “Military service is probably on your military ID or it used to be.”
  + “Why is the military claim number important?”
* Would you know what to provide for these fields? If not, how would you get that information?
* **Service periods**
* Would you feel prepared to answer these questions or would you need to look them up?
  + Start date and end date I would be able to put the definitive dates but the end date might be different.
* 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?
  + Only honorable and dishonorable.
* *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?
  + “What if you had two names in the case you are a female?” “Would you get credit to both and would your be able to affirm your service with a hyphenated name?”

Participant was not quite sure how to navigate this question.

* **Step 4 of 6: Burial benefits**
* **Previous Decedents**
* Would you understand what this question is asking?
  + Yes If I had buried a spouse
* *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?
  + I was most interested in Arlington so I would pick that by default. I would imagine someone would choose a place that’s close to somewhere they reside? Or if I had family buried in a national cemetery and I wanted to be buried with them? I would click on the find a VA national cemetery link.
* If they don't: How would you go about finding a cemetery?
* *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?
  + “Copy of my DD214 or anything else. Theres good old snail mail .. I like that that’s an option.”
* What do you think you could provide to help your application process?
* How would you go about uploading a file if you're on a mobile device?
  + I would take a picture of it and click on the upload files drop down.
* What are your thoughts regarding the allowed file type for PDFs?
  + It’s the only kind I know. It would not be an issue for me to upload.
    - Applicant tried to upload a second file
* **Step 6 of 6: Review application**
* What would you do at this point?
  + “Review my application to make sure I have completed it and then check off the privacy box and submit.”
* **Confirmation**
* What would you do at this point?
* When do you think you would get a decision?
  + Within 90 days
* Is there anything that would be helpful to see at this point once you've submitted
  + “The confirmation email that lets me know I did it correctly. Also for people who don’t have printers , a way to save this.”
* *Have them click After You Apply link*
* **After you apply**
* *Have them briefly look at page to get their thoughts*
  + *Applicant liked that there was guidance on when to expect a decision about the application.*
* *Without the DD214 it was challenging to complete without the document.*

## 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?
  + “I thought it was fairly straightforward.”
* 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?
  + No. Just the part about if I were a significant other or domestic partner.
* 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?