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

P6

## 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 am active duty army.
* 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?
  + I did not know that
* What do you think qualifies you to be buried in a national cemetery?
  + I assume some kind of deployment associated with line of duty.
* When thinking about planning for your burial, would you prefer to be buried in a national cemetery?
  + I did not plan to be buried, I was thinking cremation
* Have you applied before to see if you're eligible for burial in a national cemetery?
  + First time – yes just apply and see how it works out
* 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 1: Applying for Self - Applicant is a Veteran - 15 minutes

* **Scenario:** For your scenario, 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. I'm going to briefly have you take a look at this information page before you start the application.
  + **Trying to find out which cemetery would be the only thing. It should be more specific .. I would click on this link to see if it would pull up a list of cemetaries and point of contact to speak with them and see if there were other requirements.**

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

* **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?
  + Applicant struggled to find the apply now button
* Do you feel prepared to start applying?
* *Things to watch for:*
* Does the user feel the need to click on external links?
* Does the user try to open the Privacy Act Statement before continuing?\_
* **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) Straightforward and convenient with the drop down menus and options already
* Does the user feel the need to open the additional info component? No, clicking on all the require fields.
* 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?
* What are your thoughts regarding the available options? (should select applicant is a Veteran)
* *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? No
* **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?
* Is there anything you would change?
* *Things to watch for:*
* How do users react to answering potentially sensitive questions?
* How do they approach Other Category Comment field? No, I don’t think its anything that’s not understandable. “If youre bi-racial, and the list doesn’t let you select more than one … or if the list doesn’t have what im looking for.”
* **Step 3 of 6: Applicant military history**
* **Military details**
* Are you familiar with the military status dropdown options? Yes
* Would you know what to provide for these fields? If not, how would you get that information ? It covers everything that would apply.
* **Service periods**
* Would you feel prepared to answer these questions or would you need to look them up? DODID number now .. if they are a veteran they would have a claim number. I don’t have one but I think its fairly standard once you’re retired.
* 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? I did not retire so I would not be under a specific discharge …so I think this would disqualify you if you clicked on anything other than honorable.
* *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?
* **Step 4 of 6: Burial benefits**
* **Previous Decedents**
* Would you understand what this question is asking? Yes, if there is anyone buried with me or claimed it under my name or something like that.
* *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? “This would apply if you had a spouse eligible for your benefits”
* **Desired cemetery**
* Do you have something in mind for where you'd like to be buried? “If I did have a situation where someone wasn’t buried under my benefits I would want to be co-located with them and see what comes up for availability and see what the response is.”
* If they don't: How would you go about finding a cemetery? “I can click on the find a VA national cemetery and it will open in a new tab.”
* *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? Yes because it said before we got started that I would need supporting documents and just the fact that you’re doing it online that would mean its required. From someone out of service and older if they couldn’t I don’t know if there is an option to fax.”
* 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? Click on what type of file then go down and it hopefully opens up a file browser on your phone to navigate where that file is.
* What are your thoughts regarding the allowed file type for PDFs? I think its standard for document files. Its an easy way to make sure the file isn’t too large so its pretty standard file format for documents.
* **Step 6 of 6: Review application**
* What would you do at this point? “Go through my name and personal information, address, email, and it did capture all of the choices that I made for each dropdown.” Its convenient that it says theres a button that says edit so you wouldn’t have to do everything right from the review page.
* **Confirmation**
* What would you do at this point? Review the information and accept the privacy policy but I never read them anyway. Submit application.
* When do you think you would get a decision?
  + Something within a week or two.
  + I would check for a confirmation or print the page to show that I submitted it and theres a form number associated.
* Is there anything that would be helpful to see at this point once you've submitted?
  + I would click on find out what happens after you apply to see if theres a timeline . Seems reasonable just to wait … I’ll be sent something in the mail that will have this letter confirming my eligibility.
* *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? “I think it was easy to understand, each step was broken down into easily managed parts to input information.” Option to save after next step
* 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?
* 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?

## Thank You and Closing - 2 minutes

* Well, we really appreciate you taking the time to share your thoughts with us today. Your feedback is so helpful to us as we continue to work on the VA.gov Pre-Need application to make sure that it really works for Veterans.
* Thanks so much! Lastly, Perigean will be sending you a thank you note with a little blurb that you can pass along to other Veterans you may know to provide them the chance to participate in future research studies.
* Thank you so much again, and enjoy the rest of your day!

**STOP RECORDING**

* **Ask observers for top takeaways after participant has dropped and, as a group, note participant quantitative results.**

## Emergency Exit

[In the rare case of an emergency during a session, be prepared with an [emergency exit strategy](https://depo-platform-documentation.scrollhelp.site/research-design/Research-Safety-and-Emergency-Exit-Strategies.2143649793.html#ResearchSafetyandEmergencyExitStrategies-Sampleexitstrategies). Plan to include here at least one option, so its easy to find during a session. Take some time to practice so it feels more comfortable.]