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

P8

## 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]
  + Veteran and military spouse
* 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? No
* What do you think qualifies you to be buried in a national cemetery?
  + Being a veteran and having served honorably
* When thinking about planning for your burial, would you prefer to be buried in a national cemetery? I hadn’t thought of it .. my dad is buried in a national cemetary .. I guess it would be a good idea to be buried in a national cemetary but haven’t given it much thought.
* Have you applied before to see if you're eligible for burial in a national cemetery? No
* 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:*

* **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?
  + This mockup is a lot easier to understand and not having to have to explain it to you. This was back in 2004 and nothing was digitized and everything was paper. If they didn’t have a copy, they would let you know that they would pencil you in 2-3 weeks later that they had receive the package information”
  + Having it clearer in the general form is a lot easier. I like that it has the bolded language that this doesn’t apply to Arlington.
  + Applicant liked the dates and times that they are available to answer questions.
* Do you feel prepared to start applying? “Having that persons information does help.” “Good to know that having the DD214 makes this go faster.” “Its good that in case I would need help there is someone available to help me fill out the form and that they will contact me via phone or mail if they needed more information and then final decision in the mail … that’s good.” Yes. (would feel prepared.)
* *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**
* **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) No difficulty
* Does the user feel the need to open the additional info component? No issues.
* 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? We are family or am I just helping them? The wording I could see not only myself but other people being severely confused with how its worded but you should word it “What is the service member to me”
* *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?
* **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?
* *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:*
* Do they understand they would need to provide the applicant details here (Robin Smith)? Pretty standard
* Does the user show any confusion with two new birth fields?
* **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? Pretty standard questions I know this information can change.
* 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? The other box would be for something that is not on the list. When I fill out these forms this is tricky because I identify as Hispanic latino so am I white or other?
* **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? You could pull it up on VA.gov resources from there.
* **Service periods**
* Would you feel prepared to answer these questions or would you need to look them up? They are a veteran regardless
* What would you do if you didn't have this information on hand? First page of the DD214 , their social security number, date of birth, address, last known rank and days they haven’t sold back to the government when they get out.
* 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?
* **Step 4 of 6: Burial benefits**
* **Previous Decedents**
* Would you understand what this question is asking?

*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?
* If they don't: How would you go about finding a cemetery?
* I like that there is wording about expectation when there turns out to be no room available.
* That is a good question .. I guess I would look at the statewide first to see if there’s a national cemetery that’s available in their state or from there I would have to open the VA national cemetery page to find out what is available for robin.
* *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? They need Robins DD214 and a power of attorney. It’s straightforward on my end.
* 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? Yes
* What are your thoughts regarding the allowed file type for PDFs? Im perfectly fine with PDF files being uploaded especially with E-benefits encrypted site the files become corrupt. PDF makes it a lot easier to read.
* **Step 6 of 6: Review application**
* **Confirmation**
* What would you do at this point? Review the application for wrong information. I know people don’t bother and say they did it right and don’t get a call back. I typically don’t print.. I screen shot it or take a picture of the details.
* 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 would just make copies of any files I would have to send forward and take the NCA centers information in case they need it.
* *Have them click After You Apply link*
* **After you apply**
* *Have them briefly look at page to get their thoughts*
  + *Would want information about burial liners*
  + *Lots of questions about other burial benefits*
  + *Cant you use E-benefits to look up information ?*
  + *That call back number you’re placed on a long call and you could’ve just updated it on e-benefits*

## 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?
* 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? 4.5
* 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 think just having it out there and having reading material around VA centers about the mobile app to let service members know that this exists.
* 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?