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

P5

## 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 mom is the veteran, I am her caretaker. I take care of all of her appointments and go through the website to look at her details and health history. I use it frequently.
* 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?
  + When my mom had her stroke they gave me all of the information from the VA.
* What do you think qualifies you to be buried in a national cemetery?
  + You have to be a veteran or in service and I guess if you had an honorable discharge.
* When thinking about planning for your burial, would you prefer to be buried in a national cemetery?
  + If we didn’t have our own family plot, then yes I would want to.
* 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?
  + “For me, it’s a lot. Especially if you are doing this on your phone. This is a lot for me to even go down and get the information. It’s very wordy. I get it you want to give the information up front but it’s a sensitive subject its just overwhelming. It could be less wordy.”
  + “I like how I can start here at the top and also when I scroll down I don’t have to scroll back up. I like how you have “if you need assistance” in the middle and at the bottom. SO that’s pretty good as well. You let me know after I have finished whats going to happen.”
* 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**
* **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.
* Does the user feel the need to open the additional info component?
  + Its helpful that they would have my information. Participant also liked the external links that provide extra information and the save your pgress feature.
* 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?
* *Things to watch for:*
* Do they understand they would need to provide their details here as the preparer (Sammy Smith)? No there was confusion here about who was applying and their relationship to the veteran.
* **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)?
* 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? No reaction
* **Applicant demographics**
* Do you have any thoughts regarding the questions and options available here?
  + I’ve seen on other applications where they’ve had varying degrees of other options.
* Is there anything you would change?
* *Things to watch for:*
* How do users react to answering potentially sensitive questions?
  + No this is fine.
* How do they approach Other Category Comment field? “Do I just leave this blank?”
* **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? This information would come of the DD214.
* **Service periods**
* Would you feel prepared to answer these questions or would you need to look them up? If I didn’t know, I would get the applicants DD214 form and pull the information from that.
* 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? 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? “So the applicants name was previously Sammy Johnson?”
* **Step 4 of 6: Burial benefits**
* **Previous Decedents**
* Would you understand what this question is asking? “What would you like for me to select here?”
* *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? “It’s straightforward.”
* **Desired cemetery**
* Do you have something in mind for where you'd like to be buried?
  + “I like that you tell us up front that the space might not be available. You let us know upfront if we get our heart set on a cemetery and its unavailable.”
* 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? Yes “Do you want me to click upload file?” “DD214 is the discharge file?”
* What do you think you could provide to help your application process? No
* How would you go about uploading a file if you're on a mobile device? It would have to be saved .. I don’t know if you can… “
* What are your thoughts regarding the allowed file type for PDFs? No issue
* **Step 6 of 6: Review application**
* **Confirmation**
* What would you do at this point?
  + I like how I can edit if I need to. I like ot select what I’ve previously inputted. If you’re moving fast you can miss something.
  + I would click “What happens after you apply link for self-assurance then exit out of the page.”
* When do you think you would get a decision
  + In a few weeks so they would let us know by mail. At least 3 weeks.
* Is there anything that would be helpful to see at this point once you've submitted
  + No I think it’s the pertinent information
* *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?
  + It wasn’t that bad. Easy tofollow through. The first page was very wordy but after you got into the application everything was pretty 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?
  + 4
* 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?
  + “It’s just very wordy in the beginning, I would try to chop that down. Its pretty user friendly. I like how it was pre-filled and knowing that someone has an account, their information is already pulled over.” “I like that you allow them to go back and review before submitting.” “ I also like how this is not timed and that you can save your information and leave and come back.”
* Is there anything else on your mind that we didn't ask? No
* 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?