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

**Warm-up Questions - 5 minutes**

* To start, I'd like to ask you a few warm-up questions.
* Can you tell me a little bit about yourself? [Determine if they're a Veteran, family member, or a personal representative]
  + P: veteran, 100% disabled, enlisted in \_\_\_, was in Desert Storm, works as a software developer
* Did you know that you could apply to see if you're eligible to be buried in a national cemetery at any time? - If so, how did you find out?
* P: yes. Found out: well, I buried my father-in-law
* What do you think qualifies you to be buried in a national cemetery?
  + P: honorable active duty service
* When thinking about planning for your burial, would you prefer to be buried in a national cemetery?
  + P: probably a national cemetery close by.
* Have you applied before to see if you're eligible for burial in a national cemetery?
  + P: I have not applied. I’m assuming that I’m eligible.
  + 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?
    - P: sure.

**Task 3: Applying for Someone Else - Applicant is Non-Veteran - 20 minutes**

Ok, in the prototype we're looking at an information page about pre-need. I'm going to briefly have you take a look at it before you start the application.

* **Scenario:** For your scenario, pretend that you are Sammy Smith. You're a navy Veteran, and you have a disabled unmarried adult child who is 20 years old. You want to plan for the future and find out if your adult child is eligible for burial in a VA national cemetery under your benefits. 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**

**Information page:**

* + P: First I’d want to check what’s in this section [the hamburger menu], but I’d want to read through everything.
  + P: I’m reading through the form now, trying to see what it says. [he read through the section that described him and tied it to the scenario correctly]
  + P: since I already know what cemetery I would go to, I would not want to find a va national cememtery [tried clicking the link]
  + P: now it says I have to gather supporting documents, so now I have to find out what I’d want to gather. [honed in on the section for unmarried adult child for the scenario]
  + P: once I have all the information I need, I’d click this green button to apply. Looks like I can apply by mail and by fax. Chances are, I’d click this button before going any further, so I wouldn’t read below that. [clicked after confirming button works].
* **Introduction**
  + P: so it says it can prefill some. I can either start it right away or I can go through the list?
  + M: what are your thoughts on the content on this page?
  + P: if you have a list to start the process, then I don’t know why they’d list all the steps .i don’t know why they have a link here. Is that to shortcut it in case people don’t want to read the instructions?
  + P: that’s the same link as above [under step to apply] so I guess I’d miss everything if I clicked the link above. The previous page told me everything I needed so I wouldn’t have to read everything below.[started with top link]
  + What are your thoughts regarding the content on this page?
  + 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?\_
  + Applicant routing:
    - P: in this scenario, you said a disabled child?
    - M: correct
    - P: So is the disabled child physically able to sign the application or not? This says if they’re physically able, then I can’t fill out this form for them. They’d have to fill it out… we can go through this form and find out. Does this mean I’m applying for someone else? If I’m the veteran, am I looking for… that actually is a little confusing. If I’m looking to qualify for benefits to bury my disabled dependent child. Would I be filling out the form since I’m the veteran or would I be applying for someone else that’s my dependent? Maybe if I go back and read a bit more. Chances are I’d click on continue [with apply for someone else] and if I was wrong, I’d start over again.
* **Applicant information - Applicant relationship to service member / Veteran**
  + P: so now this makes it more clear. I picked the right button. I’m looking for unmarried adult child. That’s the applicant’s relationship. Ok.
  + Do you understand how to answer the question this screen is asking?
    - \_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 information
  + M: would you have any questions here?
  + P: no, the only thing is that it put in the ssn without any formatting. People are used to putting them in with dashes, so it might be problematic if they tried entering them that way. I’d probably enter them with dashes if I were entering them myself.
  + M: do you feel obligated to answer the questions that are not required?
  + P: no because they’re not required. If my dependent was a jr. I’d put that in there, but I don’t know if my dependent is a jr. so I’m guessing not. Unmarried so I don’t think there’s a maiden name.
* **Sponsor information - Are you the sponsor? Y/N**
  + P: I’m guessing yes. [opened the additional info component]. That would be the only question I had on that but it’s good that you have an explanation.
  + Would you have questions about what to select here? *[They should pick Yes based on the task]*
  + Whose details do you think you would need to provide if you picked No?
* **Sponsor information - Sponsor details**
  + P: same comment on the ssn. Either formatting or instructions [on the dashes] or just remove them after it’s done.
  + M: do you have any confusion between applicant and sponsor?
  + P: no. on the previous [page] it told me what a sponsor was. Once I clicked into that, I knew what a sponsor was.
  + What are your thoughts regarding whose details you'll need to provide here?
* **Sponsor information - Sponsor demographics**
  + P: in this scenario, what should I put?
  + M: we preselected the options. It’s going to be the first selection for each.
  + What do you think about the messaging for potentially sensitive questions?
  + P: it seems pretty boilerplate for government forms anymore. You see that in just about every form you fill out or something similar.
  + What are your thoughts on the questions themselves?
  + P: they’re fine for me, I guess. Again, this is pretty much standard for government forms… for statistical purposes. They always say for statistical purposes. It’s pretty standard. I don’t have any comments on it.
* **Military history - Sponsor's military details**
  + P: this one I don’t know. What’s a claim number related to? I don’t know what that means as it relates to burial. I would know a claim number if I’m putting in a benefits claim to the va for compensation or something else… they assign a claim number, but I don’t know how it applies to this because they assign you a claim mnumber. That’s just my confusion.
  + M: what would help you understand the va claim number better?
  + P: maybe just an explanation of what it is like in that other page. What is a va claim number or something like that?
  + *Keep an eye out for confusion regarding status dropdown options*
* **Military history - Sponsor's service periods**
  + P: is that normally a dropdown [bos]?
  + M: yes
  + Are you prepared to answer these questions or would you need to look them up?
  + P: yes, that comes off of the dd214. You can find that on the dd214.
  + What would you do if you didn't have this information on hand?
  + P: I’d probably click on this page, finish this application later and go get that information. I guess there’s some people that have multiple service periods, maybe in the guard or reserves. In this scenario, do I have multiple or can I continue?
  + M: you can continue
  + Previous name: [selected no]
    - P: maybe an explanation here. Maybe when they served, they were single, so maybe they have a different name now.
    - M: would that help clarify?
    - P: yes. I can see that if somebody married and changed their name after the service, they might have a different name than after they served… maybe a little explanation of what that means.
    - M: in this case, let’s click yes.
    - P: alright, so that makes sense then.
    - M: you understand how that question was stated?
    - P: by checking yes, you need to find out more information about the name that they served under previously, but that fit the scenario that I was talking about. They served when they were single and changed their last name or something.
* **Burial benefits** 
  + P: is that that you start typing it and it suggests? Because obviously there’s a lot more national cemeteries than what is listed.
  + M: that’s usually how it is.
  + P: yeah.
  + M: in this circumstance, would you understand what you’re doing?
  + P: yeah. Under the sponsor’s eligibility. That would mean under the veteran, the veteran’s child. So if the sponsor was buried already, you can say yes. They would know that.
  + M: you can say whatever you choose
  + P: did we say they were a single veteran or not? We’ll say yes. [clicked continue to add previous decedent]
  + P: that makes sense. That’s the person’s spouse, I’m guessing.
  + What are your thoughts regarding the questions on the page?
  + Do you have thoughts or feedback for this page?
* **Supporting docs**
  + P: so here we are wanting supporting documents. [read through the content, opened types of documents component] ok. That’s understandable. [opened mail or fax component] so those two are clear explanations. I work with a lot of older veterans and I can tell you that trying to have them figure out how to upload a document from their phone is almost impossible. You want me to try?
  + M: how do they prefer uploading?
  + P: a lot of the times, they prefer to mail stuff. That explanation on how you can mail things, or they’ll try to get someone to help. They’ll call somebody who can help them to do it. Most of the guys that I work with are mid to late 70s so technology is a little challenging for them. Once you tell them once or twice they’ll figure it out. So there’s a good chance that they’ve done this.
  + M: from your experience, have you used the numbers on the page?
  + P: I’ve seen veterans… they’ll call for help. I’m guessing they’ll get transferred to the right person. I don’t have much experience with the national cemetery scheduling office, but I know they call the va a lot.
  + Do you think you would need to upload something here to continue?
  + How would you go about uploading this if you're on a mobile device?
  + P: if I’m using a phone, I would guess that when I clicked the button, it would allow me to take pictures of the document and attach them and upload them that way. If it’s wanting me to upload more files, it might be more challenging because where are those files being stored? It might be easier to do it on a desktop. Let’s see what the control says. [clicked file type dropdown]
  + What are your thoughts regarding the allowed file types [PDFs]?
  + M: as you can see, it says you can only upload pdf files. How do you feel about that?
  + P: [would be able to upload a pdf from his phone] most vets probably don’t have document scanners for desktop so it might be harder for them to come up with pdfs of their documents. If they could take a picture and just upload it… otherwise trying to have them figure out how to convert a picture into a pdf might be challenging.
  + M: you can keep going
  + P: [was a little confused by the prototype upload ability, but realized it’s because it’s a demo] I’d hit continue
  + Applicant address/contact: now we’re on the applicant again so…
  + M: would you have this information?
  + P: if I’m doing this for a disabled child, I’m assuming that disabled child would be living with me. If I’m a veteran and I’m applying for someone else, a dependent child, I guess calling them an applicant, what you’re doing… since early in the form we established the applicant is the person we’re looking for benefits for, not necessarily the sponsor. So.
* **Contact information - Sponsor address/contact details**
  + Sponsor’s mailing address. Personally, if I were to fill out this form, I would appreciate a checkbox that said, “same as the applicant’s address so I wouldn’t have to retype all this information in. if the applicant and the sponsor lived in the same home, that would save time in putting in all this address stuff. That’s a personal preference.
  + Would you have this on hand or would you need to look it up?
* **Contact information - Preparer info/address/contact details**
  + [read blue alert]
  + So you have in this type of a form, the preparer, the sponsor, and the applicant. Just as long as those roles are clear in the beginning, that’s fine.
  + M: do you understand the text in that blue box?
  + P: yeah, since you indicated you’re the sponsor, we’ve prefilled out your info. That’s pretty obvious since it’s already filled out. I don’t have any comments on it because it was obvious when I got to this form it was already filled out.
  + P: same here [on preparer address page] [do we need the alert there, too?]
  + Review page:
  + P: alright, so… [took the time to look thru accordions] just reviewing everything that I entered previously. [had question about the accordion behavior and figured it’s because it’s a demo]
  + M: would you feel obligated to check all your answers in the accordions?
  + P: personally I would just to make sure all the information is filled out correctly. I would guess most people would if they’re filling out a form and they get to a screen like this. Maybe some instructions on how to see the information. For me it’s obvious clicking on the plus but for older people it might not be so obvious. [submitted]
  + Would you have this on hand or would you need to look it up?
  + What are your thoughts on the information being prefilled here?
  + Do you understand the difference between a sponsor and a preparer?
* **Confirmation**
  + P: this makes sense.
  + What would you do at this point?
  + P: well, if.. so I’m assuming I don’t need to send anymore documents because I attached them to this form so maybe I’d check what happens after I apply to see what the next steps are. So maybe that’s what happens after you click on what happens after I apply. [tried clicking link, but had to disable pop up blocker].
  + After you apply: p: [took the time to skim through the page] so it looks like it’s going to be through mail, not email or anything. So there’s nothing else to do. Just wait.
  + When do you think you would get a decision?
  + P: it’s the va. It could take up to a year.

**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?
  + P: it was fine. It’s a standard va form. They’re getting better.
* 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?
  + P: it was pretty easy, so maybe not perfect. Maybe a 4 out of 5.
* On a scale of 1 to 5, how mobile-friendly do you think it is?
  + It looked like the menus were fine. Yeah, I think it works great mobile. Let’s just say there was a couple things that didn’t work on this demo, so I’d give it a 4 out of 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?
  + P: I might make it a little bit more like an interview thing. Like asking “who are you filling this out for?” it was there, but part of the confusion at first was trying to decide, if I’m the veteran, who am I applying for, like am I the applicant. Like if someone was sitting across the desk from me and they were asking me questions, I know with working with older veterans, a lot of times they need to be walked through.
* Is there anything else on your mind that we didn't ask?
* P: 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?
* P: not at all.