**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: 48 years old, a professor of education. Was a military journalist for a number of years, went to grad school, became a professor. Used a lot of VA benefits previously.
* 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: They sent me that after I became healthcare eligible, which was interesting. Now that you’ve got your affairs in order, it’s time for this.
* What do you think qualifies you to be buried in a national cemetery?
  + P: I’m not sure. I’m guessing now that I have a service connected disability it qualifies me on a percentage. My grandparents are buried at a national cemetery. They were all career active duty.
* When thinking about planning for your burial, would you prefer to be buried in a national cemetery?
  + P: I’ve gone back and forth on it. My inclination is towards a national cemetery, but I’m not 100% sure.
* Have you applied before to see if you're eligible for burial in a national cemetery?
  + 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: I haven’t officially applied, but I’ve gone around to the website. Would be interested in applying.

**Task 2: Applying for Self - Applicant is Non-Veteran - 15 minutes**

Ok, in the prototype we're looking at the start of the Pre-Need application.

* **Scenario:** For your scenario, pretend that you are Sammy Smith, the **spouse** of a service member in the Navy. You want to plan for the future and find out if you're eligible for burial in a VA national cemetery. Your spouse is sponsoring 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**

* **Introduction**
  + P: I’m assuming if I’m on this link, I’ve already found the section for burials and memorials. The first thing that jumps out at me is the “pre-need eligibility” phraseology there. I get where it’s coming from, but I really have to stop and think what do they mean by “pre-need”? that confuses me.
  + P: scrolling down, from there it looks like… I did see the start eligibility [button] but I’m going to read. I’m assuming any spouse that’s already got access will know how much of this will prefil. I’ve helped my dad with a lot of this va stuff as well since he was in Vietnam.
  + P: would you like me to click [start] formaly?
  + **Was confused about task regarding applying for self or someone else (spouse) which impacted the rest of his application process**
  + 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 information - Applicant relationship to service member / Veteran**
  + 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)\_
* **Sponsor information - Sponsor details**
  + P: the sponsor is the veteran who’s covered. So if I’m a spouse, then the sponsor is the actual veteran.
  + What are your thoughts regarding whose details you'll need to provide here?
* **Sponsor information - Sponsor demographics**
  + P: doesn’t see any issue with the phraseology for sensitive questions. Can’t imagine too many people being confused about that.
  + What do you think about the messaging for potentially sensitive questions?
  + What are your thoughts on the questions themselves?
* \*\*Sponsor information - Sponsor's passing \*\*
  + P: hmm. Ok. Dealing with a spouse who’s passed is going to be difficult. I certainly understand the phraseology there.
  + What do you think about the messaging for potentially sensitive questions here?
  + Is anything confusing or concerning to you?
  + Why do you think this information is collected?
* **Military history - Sponsor's military details**
  + **P: I don’t think anyone knows their claim numbers.**
  + *Keep an eye out for confusion regarding status dropdown options*
* **Military history - Sponsor's service periods**
  + Are you prepared to answer these questions or would you need to look them up?
  + P: yeah [would be prepared]… I know a lot of people are just going to click on the application. Our biggest group of vets right now is Vietnam and they might have separate claim numbers. That might not be information that they would have on hand… I would hope for military spouses that a lot of people would have this on hand.
  + P: would save the application if he didn’t have it on hand. Would hope to go back to the same screen so he could complete filling it out.
  + P: There was that information at the beginning of “be sure to have these on hand” but would want those at the bottom to be reiterated.
  + What would you do if you didn't have this information on hand?
* **Burial benefits - Previous decedents**
  + P: [desired cemetery] that’s going to be a tough one [picking one desired cememtery, doesn’t think anyone would be ready when picking one] “that feels like the biggest commitment. I’d want to know is it possible to change that at a later date?”
  + Wondered if children would be eligible. “I would hope that my spouse, I would hope that immediate family. Even as I’m talking through it, I would want to know [what he read at the beginning]. “just clarification on what the eligibility would be would help. Selecting the cemetery is what would give me the most pause. Maybe a link to.. I know some cemeteries must be filling up. I know some people would want to be buried at Arlington so maybe some information to help people choose”
  + P: deceased person: I’m confused between the deceased and the sponsor and what the definition was there.”
  + What are your thoughts regarding the questions on the page?
  + Do you have thoughts or feedback for this page?
* **Supporting docs**
  + P: supporting docs is pretty standard for any va application. It doesn’t really say supporting documents. I guess what they’re looking for is service documents but it doesn’t say anything for burials. Ah, types of documents. Dd214. I guess that’s pretty standard for va. Dd22 – guard equivalent. I’ve got 2-5 discharge forms.
  + 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: I know on my iphone. I’ve got a folder now on my iphone. If I were doing it, I would email it as a pdf and then upload it through here. Without that, I’m not entirely certain how we’d do that through a mobile device.
  + What are your thoughts regarding the allowed file types [PDFs]?
  + P: pretty much all of mine are in pdfs. I’ve scanned them as pdfs. Some people might prefer jpegs. I think all our military records are pdfs. I don’t think that’s going to be problematic for most people. If it’s a jpeg, it might be easier on a mobile app. I think everyone knows how to save a mobile picture. If I were to do it for my dad, I could go snap a picture on his phone. That might make a little bit more sense for an older generation, but I’d like to see something where I can open up a camera app and take a picture and upload it that way. I’m thinking of my generation when I’m thinking pdfs, but a jpeg might make more sense for an older generation.
* **Contact information - Sponsor address/contact details**
  + Would you have this on hand or would you need to look it up?
  + P: doesn’t feel the need to open up additional info for contact details. “I don’t really need to think about why va wants my contact details.” [would wonder about providing more personal information, like the dd214] for something like this, I’m not going to think twice about why the va wants my contact information.
  + P: sponsor’s mailing. I think I did get confused about the sponsor’s mailing and deceased person.
  + P: need help: that’s nice [would call the phone number if he had questions] first thing he would do is determine eligibility. Would hope it’s the first thing he sees.
* Review page:
  + P: it’s good to have a standardized form.
* **Confirmation**
  + What would you do at this point?
  + When do you think you would get a decision? At least after a couple of weeks, would expect to get a confirmation in the mail. Knows that’s not the case with certain application types.

**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: Overall, it’s good. After I get off this call, I am going to look at the eligibility requirements. That’s one of the biggest thing. The phraseology was confusing me a bit between who’s the sponsor who the deceased, who’s eligible… the actual application process… very standardized for this.
* 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: 4
* On a scale of 1 to 5, how mobile-friendly do you think it is?
  + P: 5. Other than me constantly going backwards I’m not seeing anything.
* If you could snap your fingers and recreate the application process for pre-need to make it better, what would that process look like?
  + P: Just what I’ve already mentioned, having the definitions and criteria being the landing page. I don’t know if it’s just me but having the word “pre-need” rephrased.
  + How would you do things differently?
* Is there anything else on your mind that we didn't ask?
* no
* I'm going to ask my colleague [Charlie or Cindy] if they have questions at this time **If there are observers:** and also see if any of our observers have any questions. [Check Teams chat for questions]
* C: You mentioned earlier leaning towards burial in a VA national cemetery, but you weren’t 100% sure. Could you talk a little about why that is? Mentioned his parent is being cremated and that factored into their decision.
* Do you have any questions for me?