**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] Marine Corps Veteran, 41 years old, disabled
* 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?
* no
* What do you think qualifies you to be buried in a national cemetery?
* Having served
* When thinking about planning for your burial, would you prefer to be buried in a national cemetery?
* Hadn’t thought about it
* 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? yes

**Task 1: Applying for Self - Applicant is 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, a Navy 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**

**Info page –**

P: I’m just scrolling through reading the eligibility requirements [had trouble with the scrolling on the prototype on mobile] for the initial page, I think it’s good. It had information that I hadn’t even thought of. A widow being able to apply is something I didn’t even know. I guess it’s good information I could pass on to family members. [was struggling with the scrolling, but found the green apply button]

* **Introduction**
  + P: did you just want me to go through the application process now?
  + M: yes, just think out loud.
  + P: ok, so starting the application process. Reading through.
  + 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**
  + P: Seeing what the status is. Seeing it’s applying to me
  + M: so the wording is completely understandable to you?
  + P: yeah, even at first glance, it’s completely understandable to me. It’s apparent to me who it’s asking who is applying at this stage.
  + 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 info: pretty standard what they’re asking.
* **Applicant information - Applicant demographics**
  + P: did not read sensitivity messaging. “I don’t mind the question. I don’t understand the purpose of it, though. Is this whole section just to collect survey data to see who is using this survey? I don’t see how this is relevant to the pre-need eligibility for burial. The questions are written fine. I understand what the questions are asking. I don’t understand what it’s being collected for. If I read it again, it’s for statistical purposes. To me, it doesn’t seem relevant. Why do you need the statistics on who’s using this and why in depth?”
  + What are your thoughts regarding the messaging for potentially sensitive questions?
  + What are your thoughts on the questions themselves?
* **Military history - Military details**
  + P: military history, pretty standard asking for your social and claim number. Military stastus, pretty obvious what it’s asking for. It’s worded well.
  + *Keep an eye out for confusion regarding status dropdown options*
* **Military history - Service periods**
  + P: service periods, pretty standard. Asking when you served, when it started/ended. Character of service, the wording is pretty weird to me. When you click on it, it’s pretty obvious what it’s asking the discharge was.
  + Are you prepared to answer these questions or would you need to look them up?
  + P: based on my personal history, I would know to answer these. I wouldn’t have to look them up. [he knows his dates]
  + What would you do if you didn't have this information on hand?
  + P: I would look for a copy of my dd214 if I still had it. If not, just because I remember how much of a pain it was to find all the information and get updated copies of everything, I would use google and start googling how to find it which led me to the proper websites to go to, which is va.gov and where to find my actual service letters and what not. I can’t remember the website where I got a copy of my dd214, but I do remember I found it via google to get all this type of information.
* Burial benefits –
* P: so asking which cemety, I assume it would pull up a full list of all the available cemeteries because that is information I wouldn’t know off the top of my head [would be good to link to information about national cemeteries, maybe a zip code feature]. If my family wanted to visit my gravesite, I don’t know if it’s possible to. I don’t know if it’s possible to link to waze or a google maps format so I could look it up… so I would know where it’s at for the aforementioned reasons.
* P: reading the note, knowing that it’s a selection, that you’re not guaranteed to get it. So where it says after the note, we’lll try to fullfil it… I don’t know if it’s possible to list the top three places to see if your first place was denied they could try to place you in your 2nd or 3rd choice. The way it looks right now, they may try to assign you to a place that may not be suitable to your family, etc.
* P: [anyone buried] ok, I understand what it’s aking [selected yes].
* Previous decedent: it’s all pretty obvious who it is, where they’re at. It seems pretty easy to understand and fill out.
* M: how do you feel about the language of the fields on this page?
* P: neutral? I don’t think it’s inappropriate. I can’t think of a better way to word it. So I guess I’m neutral. I don’t think it’s inappropriate and whatnot.
* **Supporting docs**
  + P: it’s pretty good wording, the documents you can upload. Having the fax number and the contact information right there where you can pull it up is helpful.
  + Do you think you would need to upload something here to continue?
  + P: I would feel fine with using it. This is part of the va, I guess it’s different departments, but it’s not like they can’t get access to that information, and they kind of need it to make their determination on whether or not you’re eligible or not. I would look at it as these are required documents you have to provide.
  + How would you go about uploading this if you're on a mobile device?
  + P: I have a background in cyber security so I would not, but I would also not be doing this form on my mobile device, I would be using it on my desktop computer just because it’s easier for me. I try not to put anything on my phone that has sensitive information on it.
  + What are your thoughts regarding the allowed file type?
  + P: I would expect it to be in a pdf form, but I would expect some people to want it on a jpeg form. Some people might not know you can use a free pdf program and that there are plenty out there that are trustworthy to use. I would be ok with uploading via pdf.
  + Contact information:
  + P: pretty standard, pretty easily worded. Should be able to fill everything out… I would expect this type of information to be required.
  + Review application: review page, and being able to pull it up and see all the answers you did. I like that, so you can look through and see if you made any mistakes. So you can change it. It’s good. I like that ability. Making sure you have no typos, which is why I prefer typing things out on a computer because it’s easier than typing on a mobile device.
* **Confirmation**
  + P: they always say please print this page for your records. I don’t know if it’s possible to have a copy of this emailed out to you. Having a copy of it emailed, as well, that you put your application in is a huge help. I love the places that do that.
  + P: to mail or fax documents, I see it has the information again, which is helpful. I don’t see a place where you can edit the application after you’ve submitted.
  + What would you do at this point?
  + P:
  + When do you think you would get a decision?
  + P: sometime in the next year. I’m not sure how quickly the decisions are reached. At the beginning it said that they receive a ton of applications, so it’s taking longer than normal, but seeing the va and other departments, they all say that, so I don’t know if it’s just standard language now. I would not be expecting a decision anytime soon, I guess.

**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: pretty straightforward. I don’t see anything out of bounds. The only thing I didn’t understand is why you’re asking the sex at birth, the ethnicity and all that. I don’t understand the relevance for your burial application.
* 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: 4.5 I think it’s pretty easy. Pretty straightforward.
* On a scale of 1 to 5, how mobile-friendly do you think it is?
* P: in the current iteration, like a 3 because the problems trying to swipe with it and going back. That would be a little frustrating [invision issue]
* M: what about with the ocnsiderations without swiping?
* P: I’d say like a 3.5-4 just because of the documentation. It’d be much easier for me since I already have that information in a folder, whereas if I’m using a mobile device, it’d be adding extra steps.
* 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: that’s a… I’m trying to think of how I would change the process up because it’s all pretty straightforward. I don’t know if there’s a way where it could prepull my dd214 or my eligibility documents that are needed from the va website if it’s possible so I wouldn’t have to upload anything at all. I can’t think of a way to make it better without knowing what data it has access to on the back end.
  + 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?