**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: I can, medication assistant working in Spokane, Washington, I take care of dementia and I rehabilitate patients that come directly from the hospital. I am also an air force military spouse. My husband is active duty. I have four kids and one of them is about to graduate.
* 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: I did not know that.
* What do you think qualifies you to be buried in a national cemetery?
* P: probably military status
* When thinking about planning for your burial, would you prefer to be buried in a national cemetery?
* P: I just want to be buried with my husband, so wherever he gets buried, I would like to be buried with him if he gets buried.
* 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: Hasn’t applied. Would be interested for this purpose. It’s not something that she would just google

**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. You are married to a service member. You want to plan for the future and apply for yourself to see 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 for yourself? In this example, you are already signed in to VA.gov.

**Questions to ask as they go through scenario**

* **Information page**
  + P: I would read. I’d probably click on the little blue link.
  + M: why would you click on the blue link [scheduling a burial]
  + P: because it just stands out to me. You can keep going [Charlie was driving]
  + [had Charlie scroll down while she looked at the page]
  + M: on this page, you didn’t have the need to click on any of the links that you saw? [note to mod to not use leading questions]
  + P: in the beginning, I did
* **Introduction**
  + P: [read through the page and clicked on bottom start 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?\_
* Application routing:
* P: I would click this little box that says I’m applying for myself
* **Applicant information - Applicant relationship to service member / Veteran**
  + P: I would click the spouse or surviving spouse tab.
  + M: Do you understand how to answer the question this screen is asking?
  + P: yes, very clear
    - \_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:
* No issues
* **Sponsor information - Sponsor details**
  + P: ok. I would have to have my sponsor’s first name and last name, too, because it’s required.
  + P: [filled out rest of page without incident]
  + What are your thoughts regarding whose details you'll need to provide here?
* **Sponsor information - Sponsor demographics**
  + What do you think about the messaging for potentially sensitive questions?
  + P: it doesn’t make me feel any way. Just seems like a general question.
  + What are your thoughts on the questions themselves?
* \*\*Sponsor information - Sponsor's passing \*\*
  + P: my sponsor has not passed away, so no.
  + What do you think about the messaging for potentially sensitive questions here?
  + P: I do see death on a daily basis, so it doesn’t really bother me, but maybe someone who has just experienced death, it may upset them a little bit, but I feel it’s something that would need to be required. While they may be upset, I also understand the need for the question, especially since it tells you, we’re sorry, it’s difficult. Essentially you’re telling them we’re sorry for your loss.
  + Is anything confusing or concerning to you?
  + Why do you think this information is collected?
* **Military history - Sponsor's military details**
  + P: so I would click on the box to give the information. I would skip the claim number and I’d go to the next box down, the next drop box and click on it.
  + *Keep an eye out for confusion regarding status dropdown options*
* **Military history - Sponsor's service periods**
  + P: filled out branch of service, then skipped rest of the unrequired fields.
  + Are you prepared to answer these questions or would you need to look them up?
  + What would you do if you didn't have this information on hand?
  + Sponsor serve under another name:
  + P: I guess no
* **Burial benefits - Previous decedents**
  + P: [wanted a specific cemetery in Arizona]
  + Previous decedents: I’d say no
  + What are your thoughts regarding the questions on the page?
  + Do you have thoughts or feedback for this page?
* **Supporting docs**
  + P: [had issue with no option for active duty member since her husband is a service member]
  + 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?
  + What are your thoughts regarding the allowed file types [PDFs]?
  + P: you’d only be able to use your computer for that [uploading pdfs]. If I was more cellphone savvy, I’d have the documents on my phone or drive or google to put those documents in there, so I’d feel the need to only fill it out on the computer.
* **Contact information - Sponsor address/contact details**
  + P: honestly, if none of this stuff was required, I would probably not fill it out, and I’d hit continue.
  + Would you have this on hand or would you need to look it up?
  + Review page: I’m not a tab person so I wouldn’t click on those things. I’d probably just say I read the privacy policy and say submit application.
* **Confirmation**
  + What would you do at this point?
  + P: I’d wait for the phone call or the letter by mail.
  + When do you think you would get a decision?
  + P: when I read it, it said that they were behind a little bit, so I would hope it was at least a month or so

**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: I thought it was ok. I thought that everything that was asked was necessary. I thought it was pretty easy, too.
* 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: definitely the lowest, no I’m just kidding. I would give it a 5.
* On a scale of 1 to 5, how mobile-friendly do you think it is?
* P: like I said before, I feel it’s mobile friendly, but there should be an option for the camera to upload that document if you were strictly doing it by mobile. Let’s give it a 3 [because of the PDF limitation].
* 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 guess I would only ask the required information if it was just for the pre-need, not the other information that was not required to fill out. I would just have the required information. Other than that, it was good.
* 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]
* C: how would you get your sponsor’s military service details? [would text spouse to ask him for the details]
* Do you have any questions for me?