**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]
  + Captain in the marines, served for about 4 years.
* 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?
  + Did not know
* What do you think qualifies you to be buried in a national cemetery?
  + P: for me, personally, my purple heart
* When thinking about planning for your burial, would you prefer to be buried in a national cemetery?
  + P: national
* Have you applied before to see if you're eligible for burial in a national cemetery?
  + P: I don’t know if I’ve applied. I think I’d look up the requirements. [would be interested]
  + 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 1: Applying for Self - Applicant is Veteran - 15 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, 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**

* **Information page:**
  + P: [participant was unable to share his screen so moderator shared theirs while participant drove]
  + P: I’d say the next one would be clicking on how to schedule a burial or does it go any further? O there we go. How to prepare for a burial. Keep going down. Keep going. So for me, the next thing I would do is click, get more details about eligibility. And then that would determine whether or not I’d continue to go forward if I’m eligibible. [thought that would be helpful to have a floating window with the eligibility criteria (a modal)]… and then you unclick it and you go back to here and then I’d know I’m eligible and I’d keep scrolling down.
  + P: ok, so that would be my biggest question… this application does not apply to Arlington national cemetery.
  + M: why would you want to ask more about Arlington?
  + P: because that’s where I’d want to be buried. That’s why I’d ask that question. Ok, keep going down. [was taking his time to read the info page]
  + [read what information do I need to apply] scroll down please.
  + P: for me, personally, if it does not feed into Arlington, this is where I’d probably stop. If it at least got me into the pre-eligibity at least, then I’d continue. But with that disclaimer that it doesn’t apply to Arlington, I’d stop. So I’d hit “apply for…”
* **Introduction**
  + P: so it’ll prefill your application. That’s fantastic. I’d say start the pre-need eligibility application, so for me I have my information saved on my computer
  + M prompted them about information further down on page.
  + P: ok, keep going down, please. [was reading prepare step] ok, go down. [read rest of steps.] yeah, that’s helpful, and then I’d click on the pre-need eligibility application. I do’t care about the privacy act statement or anything like that.
  + 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?\_
  + Routing: [did well, clicked on “applying for myself”]
  + M: do you understand what this question is doing for you?
  + P: yeah, I’d assume whether it’s not me or if if I already passed like my wife or somebody trying to finish it, I’d assume.
* **Applicant information - Applicant relationship to service member / Veteran**
  + Do you understand how to answer the question this screen is asking?
  + P: did I click that wrong? Oh, the top one. Applicant is the service member or the veteran. I’d expect the question to change if you’re applying for yourself. It’s ambiguous. I’d click the top one.
    - \_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: I don’t need to fill in that stuff, right? It’s prefilled?
  + M: would you feel obligated to fill it in?
  + P: I would, yeah
* **Applicant information - Applicant demographics**
  + P: I don’t have anything wrong with them asking any of those questions. I’d answer them. So keep going. I’m fine with all the questions. I would answer.
  + What are your thoughts regarding the messaging for potentially sensitive questions?
    - P: for me, I don’t need to be apologized to. I undetsand why you need to ask those questions. I know why you do it. The whole, we understand to discomfort we may cause… I don’t need to read all that. [shorten message?]
  + What are your thoughts on the questions themselves?
* **Military history - Military details**
  + P: I don’t have any problems with any of those.
  + *Keep an eye out for confusion regarding status dropdown options*
* **Military history - Service periods**
  + P: now would this be populating or autopopulating?
  + M: wound that be beneficial?
  + P: that would be very beneficial. Branch of service and rank I don’t think is a problem for people to remember, but service dates is. [mentioned he could remember most of his info]
  + 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?
  + P: I’d go look at my dd214, which is on my computer, which helps.
  + M: if it’s required, and it says not required, would that affect your decision?
  + P: probably. If it’s something easy to remember, I’d probably put it because it’s not hard to find. I’d just plug it in.
  + Previous name: I didn’t know you could serve under another name. I guess females could use that.
  + Burial benefits:
    - P:ok, I’d fill that out and say whatever the one I found, virginia, and then just keep going down, I guess. I would click no and then go forward.
* **Supporting docs**
  + P: I’d upload my dd214 right here. [m clicked upload button for him] mine’s pdf, so click on that, upload it and move forward.
  + 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: for me, I have it on my phone, as well, so.
  + What are your thoughts regarding the allowed file type?
    - P: in regards to a pdf or a word doc? My dd214 has always been in pdf format since I scanned it when I first got out, so it doesn’t seem weird to me, if that’s what you’re asking, but I also work in the veteran space a lot so I have to provide my dd214 all the time.
    - M: I noticed that you didn’t ask to click on these information components. Is there a reason why?
    - P: I’m never going to mail or fax my documents, so that’s moot for me.
    - P: For what kinds of documents, you tell me right below. I wouldn’t click on them. At the bottom, where it says, need help, I’d say if you need to mail or fax, click this link right here, but then I’d click continue.
  + Address/Contact: applicant:
    - P: for this, I’d love for me that since you have our mailing address, that it would be automatically uploaded and if I had a change, that I’d change it. I’d scroll down. I don’t have any problem with them asking the email or phone number, since that’s usually asked with communications.
  + Review: I like that. Whoever did this..l like that you can click on your information and go through and edit wwhatever. So that’s a very nice add. I’d slide down. If something was not completely filled out, that it would highlight a note in red, didn’t fill out ssn. Didn’t fill out email. That’s something I’ve seen. I’d hit the privacy [policy].
  + M: submit?
  + P: yes sir. Ok, slide down.
* **Confirmation**
  + P: what happens after I apply? I’d probably click that and find out what happens after I apply. [took his time to read this page]
  + What would you do at this point?
  + P: for me, personally, I’d go back and take a look at the Arlington stuff. That’s what I’d do.
  + When do you think you would get a decision?
  + P: probably 4-6 weeks is how I deem the VA.

**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?
  + I thought it was pretty seamless, pretty easy. The only thing I would have liked to see is more information on Arlington before having to go to another thing, but otherwise, it was pretty easy, pretty seamless. If I had it on my computer, it would have taken me 5 minutes to complete.
* 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?
* A 5, it was very easy.
* On a scale of 1 to 5, how mobile-friendly do you think it is?
* From what I can see, I would venture to say that it’d be pretty mobile-friendly. Probably a 4. [rated it a 4 because he didn’t think he should rate it a 5 since he wasn’t doing it himself]
* 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: from just looking at it, not much. Being able to have it prefill your information from va.gov is fantastic. So I don’t think you can make it much shorter. So you’re pretty good right now.
  + How would you do things differently?
* Is there anything else on your mind that we didn't ask?
  + P: no, I don’t think so. I think all of this… I think everything is pretty easy, pretty self-explanatory. I don’t see how you’d have many problems doing that. As far as usability, I’d give it a 5.
* 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?