**Conversation Guide for a Board Appeal (NOD) Usability Study, March 2021**

**Intro - 5 minutes**

Start recording.

* I have started recording. I'd like to confirm: Are you comfortable if I record my screen and the audio as we talk today? Yes.

**Warm-up Questions - 5 minutes**

Before we look at the website, let's start with a few warm-up questions.

* Can you tell me a little about yourself or your service history? I spent 30 years in the Marine Corps as a pilot and traveled the world.
* Have you used the VA.gov website before?
* If yes, what was the last thing you were doing or looking for on the site? Yes, I was trying to find some data for my neighbor that had a questions for disability ratings so I tried to find that charts.
* How was that experience? It was okay, it wasn’t easy, not hard just middle of the road.
* Have you ever tried to file a claim for a disability with the VA?  I have.
* If yes, how was that experience? I did it BDD and it went very smooth. I received assistance from the DVA in CA. submitted paperwork, the physicals were near by and everyone was professional. I received my rating within 90 days of retiring.
* Have you ever filed an appeal on a decision you received from the VA? I did, I filed an appeal on the disability ratings I got.
* If yes, how was that experience? Probably not as good as the initial claim because I submitted a lot of information. One area where whoever reviewed it agreed with me and a few others didn’t. I feel like I was successful for a third of the requested I was making.
* Let’s take a look at the prototype now. Since this is a prototype, some buttons and features will work, some will not.

**Task 1: [Request a Board appeal]:**

Imagine that you have logged in to VA.gov and you have navigated to this page (Board Appeals Info page) because you disagree with a decision VA has made about one or more issues you have submitted a claim for.

Starting on this page, please walk me through how you would request a Board Appeal (also called Notice of disagreement). Please tell me what you see on each page, what you think the purpose of it is and what you would do on the page. (It is helpful if you think out loud, so I can follow what you are thinking, trying to do, and experiencing).

**Board Appeals info page**

* Take a look at this page and tell me what you see here, and what you would do on this page: Covid stuff gets in the way of everything. Reading can I request a board appeal. Okay. So I guess note about opting into the new process. The opt in thing is confusing.
* What is confusing: I guess the decision before, then you need to opt in but it doesn’t tell me why. This was from the legacy appeal process, but it doesn’t tell me why I need to opt in and what it does for me. There is no consequences, and why should I do it. 3 options, okay. I think it is a positive where it talks about working with a representative to remind veterans to do that. Submit evidence will take more than one year, that’s a long time especially if you have waited for a decision, it is a long time for an appeal to be adjudicated. I guess they don’t want you to submit the evidence. I guess it takes a year no matter what. It’s a long time to do an appeal then down here I guess I would click request a board appeal.
* What would you do: I think if I went here I would need to schedule an appointment with my representative, if everything takes a year the options aren’t that good, if I am going to wait a year then what’s best for me. There’s nothing that expedited for me.
* What kind of information would you like at this point: I think going over my appeal, talk about that and from looking at the website, all options look like it takes longer than a year then asking their recommendation on which to follow.
* What now: I would get an appointment to go talk to my representative. I guess I would request it and fill out the form.
* Would you keep reading under the button: if I go to here and I was going to request it I would hit the button. I might scan it. what happens next, I know what happens next. If I want to request it then it says what happens next after requesting a decision. It doesn’t make sense. Track claim should that be track appeal status; claim would be my original claim. I would go back to the button and click reque3st board appeal. That opened up.

**Veteran detail pages**

* Comments: its reviewing I am who I am, then click continue. IF something isn’t correct, I would go to the va.gov profile to update it.
* What would you do to change information: I would like it to have an edit button instead of having to go somewhere else. If it looks good I would click continue. VSO thing I would click on, clicked yes, then continue. Would not having the representatives infomration be a showstopper. If I sat down the fill this out I wouldn’t be happy not to be able to do it then I would need to finish it later. I would need to call the representative; I don’t know if I would have their email. I may already have it so it might not be so big of a deal.
* Make it not required: I don’t know the purpose of the email address is. I would probably have it if I had a representative.

**Issues eligible for review page**

* Tell me what you think the purpose of this page is and what you would do on this page: This is going to list my issues that I put in my claims for disability. Now I would be identifying which issue I wanted to appeal. I may have to add an issue, maybe click on why aren’t all of my issues listed, I would click that first.
* What do you expect under the link: to know why all of them worst list, if you can list 2 issues then you can list all of them. I would need to click add and put it in. It seems odd that I need to tell them the issue on a va website, you would assume they have all of the information as well. If not I would type it in, month day and year and click save for sure. I hit save and it now joins the list.
* Open why aren’t my issues listed here: I guess if I got a deferred rating but if I had a decision I would expect it to be there. I got it if its not in the system but if it all At the same time I would expect it to be there. That is kind of a lame excuse. I would think the VA doesn’t have their act together, especially if all issues were submitted at the same time. I would wonder why all of the issues would popup as a list.
* Is anything on this page unclear or confusing? Any time you are asked twice if you agree you have to wonder why, I thought I answered this before starting. Okay why is the va making sure I know what is going on.
* Any other comments? No.

Imagine that you see only half of the issues you have previously registered, on this page. What would you think and do?

Imagine now that you want to make a Board Appeal for 2 issues: let's say for Tinnitus and Arthritis (in your left ankle). Let's assume you have all the info and documents at hand to make a Board Appeal.

**Board review option page**

* What do you see on this page and what would you do here? The options that were initially presented and I have to pick which one I want to use. Direct review tends to be the fastest but the prior pages said each would take over a year so that doesn’t make any sense. Option B says it takes longer but it already told me everything takes over a year. You tell me direct review is the quickest but B and C take longer. Before I was told everything was over a year so I am lost here.
* Is anything on this page unclear or confusing?
* Is there any information missing on this page?

Imagine that you have learned from your VSO (Veterans Service Organization) or attorney, that you need to submit new evidence, but that a hearing is not necessary. What would you do on this page?  I would submit additional evidence.

**Additional evidence page**

* What do you see on this page and what would you do here? That is pretty good, I can upload it or mail it to you.
* Questions: can I click the link to submit evidence later. So I guess if it asked to submit it now, can you upload it. it doesn’t say
* What do you expect: if I want to submit it now, I should be able to upload it. That is what I assume.
* Questions or comments: Maybe say you can upload it now or in the next step.

Imagine you have one piece of evidence you want to submit. What would you do on this page? Okay perfect, that one is a pretty good page.

What makes it good: it tells you the file formats, heads up on the max file 25MG, pictures would be problematic. It is pretty good. This has everything I need to know.

What to do next: click upload and upload what I needed to. The make file size is 25MG no matter what, is that total or individual

What do you expect: I assume it is individual because that is maybe 4 pictures and a document, that’s not a lot. I would click continue.

**Review application page**

* Tell me what you think the purpose of this page is and what you would do here: It tells me to review my request. So I would click through the details and go through that to make sure. I guess it never asked why I was appeal. Now that it is my review, all it asked was the issues and what I wanted to submit. It never asked why I was appeal. I would think that I disagree with the rating and here’s why I disagree and present new evidence to justify it. I just don’t see where that information was put forth.
* Where would that be entered, expect questions about it: I think it would have came after the issues I wanted to appeal when I checked the issues, somewhere in there I would need to make a statement.
* Imagine the form would ask certain questions or it being an open text field or box: it would be more open but have it to where I would appeal and spell it out for why and submit evidence to justify it. it would be based off of the original decision letter. One thing it said that it was in my service record, and it was an oversight because it was in the service record with the military doctor. So you would reference the medical file and resubmit it. I never said why I was appeal but short of that everything would be right. Confirms documents uploaded, shows what I want. As far as everything is in I would say yes but I think there would be a reason for the appeal and that ahs not been addressed at all.
* What about clicked edit, here on this page or back to the page: the option for the board options it would probably take me to that page. For evidence I am not really sure because it listed what I have, I guess it would take me to add more.
* Any other comments? It is late in the game to have I have read and accept the privacy policy. No one ever looks at it anyways so it doesn’t matter where it is. I wouldn’t look at it if I were being honest. I would submit request. I didn’t check that box see, that’s good.
* Anything unclear or confusing: No its good that it shows it. I am looking at the light blue box, that is good. Okay, so after the request a decision review then what should I do while I wait, shouldn’t those be reverse.
* Other comments: I don’t know this is the place to remind veterans how long it will take. Earlier all three options were a year and I don’t know if the capability is there for the current estimate for how long it will take. I don’t know how quickly the timeframes change. When I submitted my claim it took the amount of time so my expectation was met and it was in that timeframe so I felt the va was honest and they met the timeframes.

Imagine that you come to the page called Review Application. You review all the info on this page and notice that your old phone number is listed here. What would you do?

**Post-Task Interview - 5-10 minutes**

* What information would you like added to the options: can we go back to the initial page. Everything here tells me a year then the other pages gives me quickest, longest, longest. I think that the pages don’t line up.
* Would it be helpful to add the less than year or more than year to the other page: If it is from the VA view to do the quickest times is direct review, then the others the longest. It should be consistent throughout the document and if I am making a decision I need to know what the consequences of my selection are and the time element. If it will take longer than the direct review by 30 days then big deal if one takes 12 months and one takes 13 months then no big deal.
* Blue note, what information is lacking or what you needed added/changes to make it clear and easy to understand: I guess the note to opt into the new process, I don’t see where it explains the new process. It is a caveat that isn’t explained I need more information on what exactly I am doing especially fi they are making sure I am opting in. It is like go ahead and agree without understanding it. What are my board appeal options, that may make a difference for the new or the old options. I think that they assume veterans know the difference.
* If you had the legacy appeals process explained and the difference between the new and old, would that be enough or other information missing: I guess there needs to be an explanation as to why. There is no real explanation on why you should do it. I know at one time there was a bad back log and then there should be an explanation on the time element. It’s like the privacy act that no one reads but this ahs a consequence if it is not explained.
* Having gone through the form, how was that experience? It is better than a paper form. I guess the challenge for any of us, is how good is your home scanner. I would argue that mine isn’t that good and the 25 MG I could screw up and find out that I cannot put a lot of in. I know my own technical ability I may need someone to come show me how to do it. I think everything is simplified and it is moved along but there needs to be a section after you check the issue to appeal you need to pout in your own words why you are appealing instead of it being an uploaded document.
* What was most unclear or confusing in the form?
* Was there any information that were missing?
* What was most helpful in the form?
* What is one thing that could be improved in the form? No I think I commented on the things I would change. I cant think of anything else I would change.
* Any other comments?

**Thank-You and Closing - 2 minutes**

We really appreciate you taking the time to share your thoughts with us today. Your feedback is so helpful to us as we continue to work on the site and make sure it really works for Veterans.

Thanks! Lastly, do you know any other Veterans, caregivers, or service members who might be willing to participate in a future user research session? If Yes: Thank you! I'll have our team send you an email with a little blurb that you can pass along.

Great, well thank you so much again, and enjoy the rest of your day!