**Conversation Guide: User Acceptance Testing**

**MVP Form 4142/4142a (Private Medical Records)**

**October 2018**

**WebEx logistics**

* Link for WebEx: <https://bahmeetings.webex.com/meet/JWBAH> 877-885-1087 / Code: 495 965 7710
* Link to give participant: <https://bahmeetings.webex.com/meet/JWBAH>
* *Make sure you are not showing your screen.*
* *Close other windows and turn off notifications.*
* *Confirm the participant is using Google Chrome and can share their screen.*
* *When the participant is ready, begin the session with the following introduction.*

**Intro - 5 minutes**

Thank you for joining us today! My name is \_\_\_\_\_\_\_\_\_, and I also have some colleagues on the line observing. Today we're going to have you navigate through a few new screens being added to the Vets.gov site. These new screens assist the Veteran during the claim entry process by taking the burden off the Veteran and permitting the VA to retrieve private medical records on their behalf.

Before we start, there are a few things I'd like to mention:

* We aren’t trying to sell or promote any product or service to you.
* During this session, we’ll ask you to sign in to Vets.gov with the provided username and password. Then we'll ask you to share your screen with us so that we can go through the screens together.
* We will be asking you to interact with each screen, but nothing we do today will change anything about your actual account or your benefits. The user name and password you are using is for a test user and not tied to you in any way.
* There are no right or wrong answers. I won’t be offended by any opinions you express.
* This entire session should take about 20 minutes. I want to be sure not to keep you much longer, so I may occasionally interrupt you to move on to the next question.
* If for any reason and at any time you want to stop the session, please let me know.

Does that all make sense, and sound okay to you?

Great! Any questions before we get started?

**Login**

* To start, can you tell me what type of computer you are using today?
  + *If needed*: I'm asking this question because sometimes the type of computer can affect your experience. Knowing which one you are using will help our developers make adjustments if needed.
* Today we are using WebEx which will allow us to observe you interacting with the new screens on your computer. Have you used WebEx before?
  + *If no*: Explain the screen sharing, & chat functions and how to find them.
* Would you feel comfortable sharing your screen with me at this time?

**(Pass presenter rights).**

* I'd like you to open a new tab in your browser and go to [https://www.vets.gov](https://www.vets.gov/).
* Please click the login in the upper right corner.
* Please select ID.me (the green option) and then login with the email/password that I provided you.

**Form 4142/4142a Integration**

* To provide some context, you are within the Claim for Increase workflow of Vets.gov. We already have confirmed your profile details and the condition that you are claiming has worsened. Now you are being asked to provide supporting evidence for that worsening condition. Please select the option for private medical records. This indicates that you have private medical records that support your worsening condition. Now, things that will show up on this next page include:
  + Review relevant text for Private Medical Records
  + Option to either upload the records or answer questions
  + Ability to save and finish later
  + Ability to Continue or go Back
  + Help contact numbers/links at the bottom of page
* Take a moment to look through this page. Is everything on this page as I just described?
  + *If not*: What is missing?

**PMR Upload**

* I want to make sure that you can complete both options, but first click on the option to upload. On the next page, please go through the steps that you would take to upload your private medical records. Things that you can do on this page include:
  + Review instructional text for uploading documents
  + Ability to upload one document
  + Ability to upload more than one document
  + Save the document(s)
  + View a summary of the document(s) that you upload
  + Ability to stop and finish later
  + Ability to Continue or go Back
  + Help contact numbers/links at the bottom of page
* Before you click ‘Save’, take a moment to look through this page. Based on my previous description, is everything on this page as you would expect?
  + If not: What is missing?
* Go ahead and click ‘Save’. Now click the Back button until you are back on the screen where you have the option to either upload the records or answer questions

**PMR Initiate Request | Patient Acknowledgement**

* This time instead of clicking on the upload option, click on the other option that says ‘No, please get them from my doctor.’ As soon as you select this option you should see a Patient Acknowledgement appear. Things that you can do on this page include:
  + Review the Patient Acknowledgement and check/uncheck the box for it
    - Note that you can only proceed to the next screen if the Patient Acknowledgement is checked
  + Ability to stop and finish later
  + Ability to Continue or go Back
  + Help contact numbers/links at the bottom of page
* Take a moment to look through this page. Is everything on this page as I just described?
  + If not: What is missing?
* Go ahead and check the Patient Acknowledgement and click Continue

**Provider Details | Limited Consent**

* On this next screen, we need to gather the details for the provider who you want the VA to contact to get private medical records on your behalf. The things you should be able to do on this page include:
  + Add all provider details (name, address, valid dates of treatment)
  + Ability to indicate if your consent is limited, which we will talk about more in just a moment
  + Ability to enter more than one provider
  + Ability to stop and finish later
  + Ability to Continue or go Back
  + Help contact numbers/links at the bottom of page
* Pause here for a moment. Is everything on this page as I just described?
  + If not: what is missing?
* Now enter 2 providers. Use a fictitious provider name, address, dates of treatment. Pause when you get to the limited consent checkbox.
* Check the box for limited consent, leave the limitation field blank, and proceed.
* Find the helper text for limited consent. If you didn’t already know the definition for limited consent, does this help you?
* Now enter a limitation into the limitation field (can be made up) and click the Continue button

**Provider Summary**

* On this next screen, you should see a summary view of the provider(s) you entered on the previous screen. The things you should be able to do on this page include:
  + View a summary/list of the providers you just entered
  + Ability to stop and finish later
  + Ability to Continue or go Back
  + Help contact numbers/links at the bottom of page
* Is everything on this page as I just described?
  + If not: what is missing?

**Wrap-up**

You are now finished! We really appreciate you taking the time to step through these new screens 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. Do you have any other questions before we wrap up?

Thank you and enjoy your day!