**Conversation Guide – Individual Unemployability Claims**

October 2018

**Intro - 2 minutes (until :2 in)**

Thanks for joining us today! My name is [name], and I also have two colleagues on the line, Amy and Cindy. They are observing and taking notes.

We work with a team at the VA on a website called Vets.gov, and we're interested in speaking with you today about a new section the team is designing. We’d like your thoughts on what aspects of it work well and where we might make improvements to make things even easier for Veterans

Before we start, I’d like to mention a few logistical details:

**There will 2 parts to our discussion today**

1. First, I’d like to learn a little about your claim filing experience by asking a few quick questions.
2. Next, we’ll walk through a few scenarios and you can share your thoughts on the application.

**The entire session should take about 30-45 minutes.**

* **We are interested in hearing your honest opinions**. We are in no way testing your knowledge or ability. We just want to hear your ideas and be sure the application we are designing will meet Veteran’s needs. You are welcome to express any opinions you wish. We welcome your feedback.
* **If for any reason you want to pause or stop the session at any time, please let me know.** Your participation is completely voluntary.
* **Just so you know, we will not ask any questions about your health or medical conditions.** We are interested in the online process itself.
* The online form we are designing is for Individual Unemployability (IU) benefits.   
  By testing the form thoroughly, we hope to ensure that the form is written in a thoughtful way and helps Veterans understand exactly what evidence they need to provide.
* Lastly, we generally record sessions, in case we need to confirm that we have captured your opinions accurately. **Are you comfortable if I record the audio as we talk today?**

Do you have any questions so far?

Great! I'm going to turn on screen and audio recording now. When we hear an announcement that it’s started, I’ll ask again if you are okay if we record the audio.

*[The meeting host will begin audio and screen recording.]*

Are you comfortable if I record the audio today?

**Background Questions - 3 minutes (until :5 in)**

1. **First, let's discuss your experience of filing a VA claim.**

* Approximately how long ago did you file your IU claim?
* What do you remember about the process of filing for IU?
* About how long did it take you to prepare and submit your claim? (hours, days, months, years?)
* Did you get help with your claim?
  + (Friends, family, VSO, other POA?) Why/why not?

*(If needed) I'm sorry your prior experience was so burdensome. Our team’s goal is to streamline the online application process. I’ll pass the information I learn on today’s call along to the designer, so they can make the necessary adjustments. We're planning to bring forms online one-by-one and IU is one of the first several forms that the team is tackling.*

1. How comfortable are you with technology and using websites?
2. Have you ever used Vets.gov before?

Vets.gov is a site we are working on to unify and simplify Veterans' digital interactions with the VA.

**Transition to scenarios - 2 minutes (until :7 in)**

Now we're going to shift gears and walk through a few scenarios.

**Just so you know, the prototype that we’ll be reviewing today is a mock-up, rather than a real website.**

Let’s take a look at one of the pages, so I can point out a couple of things that you’ll notice as you click through the prototype.

* Only certain links have been activated
* You’ll not need to enter any data. When you click a field, text automatically appears.
* Blue boxes will appear over the areas that are clickable.
* “$” placeholders will be replaced with whatever the user chooses.

<Have them “try it now”.>

**Think Aloud**While you are going through the site, we ask that you **Please think aloud** and vocalize your reactions, thoughts, and decisions as you see each page. This may seem strange at first, but it helps us understand what you are thinking and helps us so much with our work.

For example, if you say something like, “I’m looking for a login button” we’ll know that you are not able to find the specific thing you’re looking for on the page.

The more you say about what you are thinking and wondering, the more we’ll learn. If you have questions about what information needs to go in a particular field, it’s likely that many other Veterans will too.

Now **I'll give you keyboard and mouse control,** so we can both interact with the prototype.

Like I mentioned before, feel free to think aloud as you go through the screens.

**First Scenario: VA Form 21-8940 Completion   
15 minutes (until :22 in)**

**Scenario 1**

Let’s assume you are a Veteran who is applying for Individual Unemployability benefits. In this scenario, the issue that prevents you from working is hearing loss. You’ve been to multiple doctors and even had an operation that did not resolve the issue. At home, you have a folder that contains some of your medical records, though you know there are others that you do not have copies of.

Starting from the current page, how would you use vets.gov to apply for IU benefits?

**Steps**

[The Steps below are for information only and are not read aloud to the participant. Debrief questions are included if there is time.]

* Intro
  + *Select “I want to answer questions…”, click Continue*
    - *Where would you expect to find information about whether or not you might qualify for IU benefits?*
    - *What level of information would you like to see once you start the process?*
    - *Would you like more generic language, or would the following criteria be helpful?*
    - *“You must have at least one service connected disability rated at least at 60%, OR Two or more service connected disabilities at least one disability ratable at 40% or more with a combined rating of 70% or more.”*
* Rated, Service-Connected and New Disabilities
  + *Select “Hearing Loss”, click Continue*
    - *If one of your disabilities did not appear, would you think that unusual? What would you do?*
* Medical Care
  + *Select hospitalized and doctor’s care, click Continue*
* Hospitalization
  + *Click to enter data, click Continue*
* Doctor’s Care
  + *Click to enter data, click Continue*
* Disability Dates
  + *Click to enter data, click Continue*
    - *How would you describe the differences between these 3 dates?*
    - *In what order would you expect to see these fields?*
* Income Details
  + *Click to enter data, click Continue*
* Employment History
  + *Click to enter data, click Continue*
* Recent Earnings
  + *Click to enter data, click Continue*
* Supplemental Benefits
  + *Click to enter data, click Continue*
* Impact on Military Duty
  + *Select any of the radio buttons, click Continue*
* Recent Job Applications
  + *Select Yes or No, click Continue*
* Education and Training
  + *Click to enter data, click Continue*
* Additional Information
  + *Select \_\_\_\_\_\_\_\_\_, click Continue*
  + *What might you upload in support of your claim?*
* Upload Supporting Documents
  + *Select Upload, click Continue*
* IU Certification
  + *Check both boxes, click Continue*
* Thank you

**Things to watch for:**

* Do they access help text to view additional content?
* Do they anticipate they’d be applying for the benefit if they weren’t eligible?
* Did they have any questions about “steady job”? Gross income? Dates?
* Where else did they have questions?

Great, let’s move on to the 2nd scenario.

**Second Task: Upload Paper Application   
5 min (until :27 in)**

**Scenario**

Okay, now I’ll take us back to the first page and we’ll do a different scenario.

Let’s assume that you are a Veteran who has filled out a paper version of the application. You hear that you can send your application to the VA on Vets.gov. How would you use the site to file the application you’ve filled out by hand?

**Steps**

[The Steps below are for information only and are not read aloud to the participant. Debrief questions are included if there is time.]

* Intro
  + Click Continue
* Interview or Upload
  + Select I will upload VA Form 21-8940, click Continue
    - What questions do you have about your options?
    - Do you think of this as an interview or would you use other language to describe what you are doing?
* Upload Documents
  + *Click Upload document*
  + *Click the Document Type field, click Continue*
    - What questions do you have about uploads?

**Things to watch for:**

* Reactions to uploading a doc into the system – does this seem natural to them?
* Do they express a desire to mail it instead?

**Scenario 3: Download and upload VA Form 21-4192   
5 Minutes (until :32 in)**

**Scenario 3**

Okay, now I’ll take us back to the first page and we’ll do the next scenario.

Let’s assume that you are a Veteran who needs to get a copy of the form that Employers fill out. Starting on this page, how would obtain the form?

**Steps**

[The Steps below are for information only and are not read aloud to the participant. Debrief questions are included if there is time.]

* Intro
  + Select I want to download VA Form 21-4192, Click Continue
* Download VA Form 21-4192
  + Select the Instructions thumbnail
    - Would you take the time to read the instructions?
* Instructions Thumbnail
  + Close thumbnail image
    - What questions do you have about filling out the form?
* What is the final page for this scenario?

**Things to watch for:**

* Do they understand the relationship between 8940 & 4192?
* What do they have to say about getting the 4192 completed?
* Is it clear that the 4192 is just for “recent” employers?

**Scenario 4: Upload VA Form 21-4192 - 5 Minutes   
(until :37 in)**

**Scenario 4**

Okay, now I’ll take us back to the first page and we’ll do the last scenario.

Let’s assume that you took the employer form to your employer and rather than sending it in, they filled it out and handed it back to you. Starting on this page, how would you send the form to the VA?

**Steps**

* Intro
  + Select I want to upload VA Form 21-4192, Click Continue
* Upload VA Form 21-4192
  + Click upload.
    - Would you take the time to read the instructions?
* What is the final page for this scenario?

**Things to watch for:**

* Reactions to uploading a doc into the system – does this seem natural to them?
* Do they express a desire to mail it instead?

**Post-Task Interview - 5 minute (until :42 in)**

Now that you’ve had a chance to explore the prototype, what questions or comments do you have about the various pages you’ve seen?

What are your thoughts on the overall process?

Looks like we have a few minutes left, so I want to pause and give my colleagues on the phone an opportunity to ask any questions they may have.

[Additional questions from any observers on the phone]

Do you have any questions for us?

**Thank You and Closing - 1 minute (until :43 in)**

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, if you’d like to share this opportunity with other Veterans or Veteran groups you're a part of, I can send you an email with a little blurb so you can easily connect folks to us.

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

**Related Documents and Resources**

1. CM Research Plan
2. 8940/4192 Sprint Research Plan
3. Design prototype

**Research Goals**

1. Overall
   1. Find any major usability issues or challenges with the interview flow before we release it.
2. 21-8940 Issues
   1. Copy
      1. Are the instructions clear?
      2. Will Veterans already be aware of the criteria that qualifies one for IU?
   2. Evidence
      1. Does the Veteran understand what evidence will support their claim?
3. 21-4192 Issues
   1. Copy
      1. Are the instructions clear?
      2. Does the Veteran understand which sections they can complete?

**Screenshare logistics**

*In the Attendees section of WebEx, make sure everyone except the participant is on mute*

*In the Audio section of WebEx, click the drop-down arrow and make sure "Play Entry/Exit Chimes" is unchecked*

*When the participant is ready, begin the session with the following intro*