# Notetaking Doc: Find a Form PDF Downloading Research

## **Warm-up Questions - 5 minutes**

Let’s start with a few questions...

### **If using a screen reader**

* What assistive technology are you using today?
* How would you rate your level of experience with using a screen reader--beginner, intermediate, advanced, or expert?
* How long have you been using a screen reader?
* Are you wearing headphones today?
  + *(if on desktop)* Could you please share your audio with me on Zoom?
  + *(if on mobile)* Would it be possible for you to take them off and use your computer or mobile audio?
  + I'm asking so I will be able to hear your screen reader during the session.

### **For all participants**

* What device are you using today? *(Phone / Tablet / Computer)*

iPad

* What kind of a device is it? *(Windows / Mac / iPhone / Android)*
* Have you ever looked online for VA forms?

Yes

* + If yes, can you describe the last time you did that?

I went through the process of getting VA compensation for activities during Vietnam – so I had to find forms for that and the appeal process. This was about 4 years ago so all I remember is that I found them through some VA website. Normally I fill out forms online and then print them, but it was a while ago, so I don’t remember exactly what I did.

* + - what looking for?
    - where went?
    - how recently?
    - on what device(s)--computer, tablet, or smartphone?

## 

## **Screen sharing**

I would like you to share your screen with me so I can watch you use a specific website. I'll need to see only a blank web browser window for now. *(refer to Screen sharing instructions above, if needed)*

* *NOTE how to share URL: dictate / Zoom chat / email / text*
* *NOTE design version: Instructions once at top / repeated for every form in blue box / repeated for every form in help text above download link*
* What web browser are you using?

*(Chrome / Edge / Internet Explorer / Firefox / Safari / \_\_\_\_\_\_\_\_\_\_\_)*

## **Veteran Tasks**

Imagine that you just learned that you can complete VA forms electronically. I’m going to give you some forms to find, and I’d like you to fill them out to submit to the VA. I'll have you start from a website that I'm going to *(spell/put into the Zoom chat/email/text)* for you to click on (<https://staging.va.gov/find-forms/>).

I would like you to **talk aloud** as much as possible so that you share what you're thinking, what you're doing, what you like, what you dislike, and what you're unsure about.

### 

### **Task 1: [Form 10-2850c--most downloaded, has digital signature] - 5 minutes**

Imagine that you are a healthcare worker applying for a job with the VA. You want to find the form that you can use to apply for a health job. How would you do this?

I would look for the word application. How about I search for, “job application healthcare.” That gave me 130 results. \*Found correct form, it was the first one in the search list\*

\*Clicking did not mark the box and did not open the text box\* At this point I would go to my computer and try it. I start off every morning with my iPad for reading and searching the web, but in the afternoon I go work from my laptop. If I were completing a form for the VA I would probably open it from my computer.

\*Tried using the tab key to move between text boxes, but nothing happened\* If I were desperate to make this form work then I would find a phone number to call and ask how to make the form work.

It has instructions for how to open the form on acrobat reader, but I don’t think I have acrobat reader – I haven’t used that in years. IOS has shifted towards using native programs to do that. \*Downloaded acrobat reader\*

\*Followed instructions on page to install adobe acrobat\* I am not sure where my downloaded files are on an iPad…\*found the files (2 download files because they downloaded it twice), but they were unresponsive to being clicked on\*

When I complete these types of forms on my computer (MacBook) I can do it without Adobe. If I am not able to edit the form then I just use the annotation feature to edit and then I can save/send them.

* Please talk me through what you're doing.
  + *(Search for "health jobs" > Click on "Application for Associated Health Occupations"--form 10-2850c)*
* *(If they need prompting...After they open the form:)* What do you see here?
* I'd like you to start filling out this form.
  + *(after they've typed something into one or two of the fields)* You don't have to fill out the whole form; let's stop there.
* Clicked on "Get instructions" link?
* Navigated back to Find a Form page?
* Downloaded form?
* Noticed that file downloaded?
* Found the downloaded form?
* Opened form in Acrobat? (SUCCESS)
* Filled out form?
* What would you do if you wanted to continue filling out this form later? *Saved form?*
* Now assume that the form is completely filled out. How would you sign it? *Digitally signed form?*

What are your thoughts about the process of filling out this form?

### 

### **Task 2: [Form 10-0003k--has digital signature] - 5 minutes**

I'd like you to again open the web page you started on. Now assume that you got the healthcare job with the VA. Suppose you've started working and want to look into what scholarships you could apply for. How would you find the application form for employee scholarships?

I would probably search for “employee scholarships.” \*downloaded/opened the form\* I see something that says my PDF viewer may not be able to view this and that I can update to the latest version of Adobe. \*a screenshot of the message is below\* Anybody who is trying to use Adobe with Mac is not going to work well with Mac because IOS has its own system. It has been 3-5 years since Mac has gotten away from Adobe. I happen to have a PC so if I get stuck on something that a Mac can’t do then I can go to that computer, but that is a last resort.

Graphical user interface, text, application, letter

Description automatically generated

* Please talk me through what you're doing.
  + *(Search for "application form scholarships" or "employee scholarships"*
  + *> Click on "Employee Incentive Scholarship Program (ESPI) Application" Health Occupations"--form 10-0003k)*
* *(If they need prompting...After they open the form:)* What do you see here?
* *(skip if successful previously)* I'd like you to start filling it out.
  + *(after they've typed something into one or two of the fields)* You don't have to fill out the whole form; let's stop there.
* Clicked on "Get instructions" link?
* Navigated back to Find a Form page?
* Downloaded form?
* Noticed that file downloaded?
* Found the downloaded form?
* Opened form in Acrobat? (SUCCESS)
* *(skip if successful previously)* Filled out form?
* *(skip if successful previously)* What would you do if you wanted to continue filling out this form later? *Saved form?*
* *(skip if successful previously)* Now assume that the form is completely filled out. How would you sign it? *Digitally signed form?*

What are your thoughts about the process of filling out this form?

### 

### **If using a screen reader, switch version of page**

1. *SLACK ZACH*
2. *get confirmation from Zach that it's done*
3. Could you please refresh your browser window?
4. *NOTE any feedback on instructions positioning or frequency*

### **Task 3: [Form 20-0968--not hosted on VA.gov] - 5 minutes**

I'd like you to again open the web page you started on. You also want the form to get reimbursed for your travel to your last doctor's appointment.

I would search for, “travel reimbursement forms.” \*Same result when they opened the form\*

* Please talk me through what you're doing.
  + *(Search for "travel" > Click on "Claim for Reimbursement of Travel Expenses"--form 20-0968)*
* *(If they need prompting...After they open the form:)* What do you see here?
* *(skip if successful previously)* I'd like you to start filling it out.
  + *(after they've typed something into one or two of the fields)* You don't have to fill out the whole form; let's stop there.
* Clicked on "Get instructions" link?
* Navigated back to Find a Form page?
* Downloaded form?
* Noticed that file downloaded?
* Found the downloaded form?
* Opened form in Acrobat? (SUCCESS)
* *(skip if successful previously)* Filled out form?
* *(skip if successful previously)* What would you do if you wanted to continue filling out this form later? *Saved form?*

What are your thoughts about the process of filling out this form?

### 

### **Task 4: [Form 20-0995--most downloaded, can fill out in browser, hosted inside VA.gov)] - 5 minutes**

I'd like you to again open the web page you started on. And there's one last form for you to find: the one to request another review of your claim with supplemental evidence.

\*searched for, “claim appeal form” and opened the form. It opened, but was not fillable\*

* Please talk me through what you're doing.
  + *(Search for "request review" or "request claim review" or "supplement claim" or "supplement evidence"*
  + *> Click on "Decision Review Request: Supplemental Claim" -- form 20-0995)*
* *(If they need prompting...After they open the form:)* What do you see here?
* *(skip if successful previously)* I'd like you to start filling it out.
  + *(after they've typed something into one or two of the fields)* You don't have to fill out the whole form; let's stop there.
* Clicked on "Get instructions" link?
* Navigated back to Find a Form page?
* Downloaded form?
* Noticed that file downloaded?
* Found the downloaded form?
* Opened form in Acrobat? (SUCCESS)
* *(skip if successful previously)* Filled out form?
* *(skip if successful previously)* What would you do if you wanted to continue filling out this form later? *Saved form?*

What are your thoughts about the process of filling out this form?

## 

## **(if time) Post-Task Interview - 5 minutes**

*Type into #feedback-backchannel: "Any questions you want me to ask?"*

* What did you *like* about what you've seen today?

The find a form process seemed to work pretty well. I was surprised how easy it was to just type in a few words and get some good results.

* What did you *dislike* about what you've seen today?

As soon as I see Adobe Acrobat I know that it is going to be a problem – it may or may not work.

* What would you like to *change* about what you've seen today?

Everything seems to be fine/normal until we got to the download process.

* Is there anything else that we haven't talked about that you think I should know?
* *RECORD assessment of technical expertise: expert / in between / not expert*

## **Thank You and Closing - 1 minute**

Well 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 improving the VA website.

Thank you so much again, and enjoy the rest of your day!