# 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)*

Windows computer

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

I have a few times. I usually go into google and enter the form number or name of it. I’ve had some challenges, sometimes I get an add based fillable form from some other company or provider – so it’s hard to find the latest VA version sometimes. The fillable forms are usually from other organizations. I tried to do a copay waiver form and it was the only one that was outdated (It's from 2016), but I have Adobe Pro, so I was able to change what I needed to (last month). I think I did that from this computer.

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

\*Scrolled down entire page first\* I’m looking through to see if there is a bullet that says how to apply for work. I see Careers in VA, I could go there. Or, I could search – but I’ll start at the link first to see if anything pops up.

\*Searched, “VA healthcare job application” and found the correct form. Downloaded.\*

**\*clicking the download link from search results opens the form in browser but from the form page it downloads a file\***

It looks like it is downloading, I’m checking to make sure it is going to download properly. \*Opened in browser(Chrome)\* I’m curious if it is going to work in the browser or if I ‘ll have to do something else.

\*Able to check boxes and enter text\*

* 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?*

I would check what save options there are. \*Clicked download (down arrow) button in top right of browser and clicked “with changes”\*

I would go back to my downloads folder to open the form. \*Opened file by default to Adobe. \*Still able to edit the form\*

\*The P THOUGHT SHE CLICKED “WITH CHANGES” BUT THE FORM DID NOT SAVE WITH CHANGES (maybe check recording?)\*

* Now assume that the form is completely filled out. How would you sign it? *Digitally signed form?*

I clicked the sign button \*pen icon at top (fill & sign)(screenshot taken by Cindy)\* and it gave me my digital signature to click and drag where I need it. \*Also able to add a digital ID and sign that way\* I prefer to have my signature as it looks when I physically sign. I think I’m only able to do that w/ A.Pro.

### **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?

\*Searched for, “VA employee scholarships”\*

\*Form would not download from the link that was in the search results. When they did it from the form page it worked, and they knew it worked because the file appeared at the bottom of the browser (usual behavior)\*

\*Form opened in Chrome after clicking on the download file in browser. Got the usual error message\*

If it doesn’t work from the browser then I will go to the form in my downloads and open it from there. \*That worked, it opened in Adobe\*

\*Able to check boxes and enter text on form\*

* 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?*

\*Tried to use fill and sign again but it did not work. A message from Adobe told her to click the signature box on the form itself and use a digital signature instead. (because of how the form was set up)

### 

### **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.

\*Searched for, “travel reimbursement form” and downloaded from the search page (which worked) but they got the usual error message. Opened the form from the file explorer instead, but the form still did not work\* It look like it is still giving me the error so I would right click the download link to see if there is a different way to save it \*also tried “save link as” which did not work\*

I’m looking for another way to save that file directly rather than through the link that it is trying to get me to use. It defaults to opening the PDF in a new tab which doesn’t work. My next option would be to send it to my phone and see if I can open it from there.

I clicked the arrow next the file in my browser and clicked open with system preference (Adobe) \*Worked. Able to edit the form, but could not use fill & sign\*

* 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.

\*Able to download and edit form in Chrome\*

* 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?*

\*Downloaded form with down arrow button in top right of browser and chose “with changes.” Was not able to edit the form after opening the saved file\* I would need to open it in a different version of Adobe to be able to edit it.

\*Tried “save link as” from the download link. Edited form in browser, saved form. Opened from file explorer in Adobe, but still could not edit\*

\*Downloaded (no option to choose with or without changes) form in browser with no edits and opened from file explorer in Adobe – able to make edits\*

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