# Notetaking Doc: Find a Form PDF Downloading Research

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

Let’s start with a few questions...

### **For all participants**

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

I am on a MacBook Air

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

Not that I remember – so if I have, I don’t remember.

* + 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?

I used to be a hospital administrator in the Air Force. I would type in VHA (Veteran Health Administration) because that is where my mind immediately goes, but it doesn’t look like it is in that list. So I’ll try job application. \*Found form. Downloaded in browser (Safari)\*

\*Able to check boxes and enter text\* I find it weird that the blocks for text do not highlight until you mouse over them. Some people may not even realize that this is a fillable form because there is no distinguishable block where you enter your information.

* 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 go to “File” and then save it or export it as a PDF. Just saving it would not keep my information, nor would I want it to – so I’ll export it as a PDF. \*Saved and kept information\* I really appreciate that it saved the information because sometimes PDFs don’t when you save them.

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

I would probably print it off and sign it. I used to be able to digitally sign it with my CAC card. I have my digital signature saved on my work computer so from here I would have to print and sign.

The big X makes it look like I am not supposed to sign there. If someone was going through it quickly then they may think they don’t have to sign it.

If they told me I had to digitally sign it then I would have to Google it to figure out – it would take additional steps that may not already be set up on your computer.

It doesn’t look like there are instructions in the search results so I would go back and look for instructions on the application. If a form requires a digital signature then there should be instructions on how to do a digital signature on the VA webpage.

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 just try scholarship at first, because sometimes a broader search term is better.

\*Able to find form and tried to download, but got usual error message in the browser\* I guess this may be because I haven’t updated my Adobe in a while. At this point I would probably go back to the download link and try to “download link as” and see if there is another way to open it – I’ll try “open link in new tab.” \*same issue\*

\*Cindy: Do you have Adobe on this computer?\* I’m not sure

\*Downloaded Adobe (took quite a while to download). Opened the form by right clicking and choosing open with Adobe\*

\*Able to edit the 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?*

\*Able to save. Re-opened and was able to make new edits and edit existing text\*

* *(skip if successful previously)* Now assume that the form is completely filled out. How would you sign it? *Digitally signed form?*

\*Able to use Adobe digital signature\* The red arrow in the corner of the signature field lets me know that I can digitally sign it.

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.

\*Searched, “medical reimbursement.” Found form on second page of search results. Same error message as usual opens in browser\*

\*Tried opening preview, same issue. Tried opening in Word, but Word would not open it\*

If you don’t have Adobe then these forms won’t open – I don’t know why the first one did. It is frustrating to have some open and some not.

\*Able to open and edit form with Adobe\*

This form does not have a signature block, you are able to just type text in there.

* 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 open the form in Safari\*

\*Able to enter text\*

* 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?*

I will use the export PDF option like I did before. \*Re-opened form with saved content and was able to continue editing\* If I hit tab to go between the text boxes it moves out of order. It goes from my first name (1a) to my last name (1c) and then to my middle initial (1b) – if I tab again it takes me down to #6.

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?

In some of the forms, I liked that they had the signature block set up specifically for signatures – sometimes you want them to sign it rather than just typing a name.

I also like how many forms are available and that they let you know which version it is/when it was last edited.

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

The lack of standardization. That is such a big thing for us in the military. The fact that all of the forms came from different places is confusing. The lack of instruction can also be confusing.

It is a pain that you have to use Adobe for some of the forms. \*Did not have Adobe already because they did not need it\* I am getting a third master’s degree and I have not needed Adobe up until this point. I have been able to fill out all forms in Safari until today.

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

For me, the biggest thing is to standardize the forms. A couple of the forms for VA employees are different from other parts of the VA.

Standardizing these forms would mean that every form has the same outline and things are done in the same way. There should be common instructions that you can give for all forms. Any specific instructions for the particular form would be on the page where the form is. Some forms have block letters and others don’t.

* 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!