**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 Laptop

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

I believe so

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

The last time would have been for VA loans, which was about a year ago. I did a search for VA.gov and then searched for VA loans on the page. I am also on the GI Bill – I’ve been on it for a couple of years. There were forms I had to fill out for that process. I either did it from this computer or my load officer may have helped me.

* + - 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 through the page first to look for a link\* I am looking for the word employment. I would look for, “health care employment” first. \*Scrolled past the correct form – was directed to the correct form\* Next, I would go to the PDF. \*PDF opened in Adobe\* I hope that I can auto-populate it. I would want to be able to save it and print it. I would want to be able to attach it to an email and then send it.

\*Able to check boxes and enter text\* Why do I have to put the country?

* 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?*

\*File -> save -> desktop\*

To open the saved version I would go to the saved PDF file \*able to continue filling it out\*

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

There should be an electronic signature option. I would then have to figure out what password I need to enter to sign it. \*Clicked signature field and was able to sign\*

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?

\*Searched for, “employee scholarships” and found the form\*

\*Able to check boxes and enter text – able to sign (same as first form)\*

This seems pretty typical. The first time I had to create a digital ID I was confused about what was going on and I just had to trust what was going on – now that I have one I see that it will be used for other forms and for other reasons. I didn’t think I would ever need it again or ever use again, but it seems like other organizations utilize it as well.

* 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’ll try, “medical travel reimbursement.” \*Able to find form\* I’ve clicked the button to download the form 3 times, but nothing is happening. I was expecting to see a little box in the bottom left corner that says it is downloading. I’ve had this happen before – so I’ll look around on the rest of the page. I don’t see anything so I would go to technical support to let them know that the link isn’t working. Sometimes I go to Firefox because it doesn’t seem to have a problem. I never go to Internet Explorer. \*Unable to download in Firefox – error message below\*

Graphical user interface, text, application, letter

Description automatically generated

I don’t want to download the latest version of Adobe because I believe I already have it. I would call my son, who is a tech in the Marine Corps, and ask if I have the latest version – but I would not trust this message.

How about I open, “read more.” There isn’t anything in these instructions that would help me because I already have Acrobat. I would just call my son – he knows all.

* 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.

\*Unable to download the file in Chrome, had to use Firefox – worked in Firefox, but would only open in the browser\*

\*Text being entered to the form began to space out more than it should for no apparent reason\*

\*Able to open in Adobe by using “open with” and was then able to enter text without the spacing issue\*

* 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?*

\*Used file -> save as\* \*Able to edit the form after saving\*

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?

I really liked the digital signature because you can save it temporarily and then come back to do a digital signature – but I know there is a trust issue and a bit of confusion if you have never done it before. I’m comfortable with it now – so that’s a great way to go.

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

Having to go to a different browser or use a different format gets so confusing and bothersome. I would need to have somebody help me through that. My frustration level gets so high so quickly that I’d give up. I’ve gone through these kinds of problems often enough now that I am able to figure out some work arounds quickly – but for people who have not had to go through these kinds of issues before it will be a big issue.

I have used Firefox before because Chrome become unresponsive at times. I used Firefox before ever using Chrome – it was my primary browser, but not anymore, now it is just my backup when Chrome doesn’t work.

* 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!