# 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)*

Microsoft Surface Pro (2 in 1 Laptop/Tablet)

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

No \*has helped the Veteran with VA-related tasks before\*

* + 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 wouldn’t know if this is the place I would go for that. Normally I would scroll to the bottom of the page and looks for a careers tab. \*prompted to use search bar, searched, “job.” I don’t see it on this page. \*Cindy directed a new search and directed P to the form\*

The last updated date seems a little old – I don’t know if that matters. \*Opened PDF by clicking the download link and opening the form from the downloads in the top right corner of the browser\* If it hadn’t opened in the browser then I would’ve gotten it from my file explorer. Oh, it opened in the browser. It says to use the tab key or mouse to move between the fields. Instead of opening in Adobe this opened in my browser. I don’t know if that is because of something with the form or my computer. I don’t like opening forms in a browser because I feel limited in what I can do, I’d prefer it to open in Adobe. At this point, I would try to do it in the browser – but if I ran into problems then I would go to the file, right click, and open with Adobe.

I like that it has an estimated burden of time to complete the information. The tab key is working to move between the fields, but I can click too. The ordering of the tabbing is off, when I tab from box #3, it moves back up to box #1 instead of going to #4. It also skipped from #4 to #7, instead of going to #5.

\*Able to check boxes and enter text\*

I am a solutions developer and I work on DOD contracts with a team to develop tools for end users. My customer would be my coworkers and the government who both use the tools.

* 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 just click the save button in the browser, but that didn’t do what I expected it to do. I expected a prompt to come up asking me where I wanted to save the file – but I now realize that it was already downloaded to my downloads folder and so it just saved that version. When I open it back up it is not fillable anymore. At this point I would go back to the site and restart – but first I would try to save it as a PDF, or to a different location. I would also try to open it in Adobe, but I am not able to edit it there either. Depending on how motivated I am to complete the form, I may sign up for a free trial so that I could edit with the Pro version. Otherwise I would go back and restart the form with everything ready to complete and submit it at once.

I’ll scroll to the bottom to see if there is a save and continue later button – but I don’t see it.

\*Opened a blank copy of the form in Adobe by right-clicking and “open in Adobe.” The form was still not fillable\*

\*Right-clicked on the saved copy of the form (from Edge) and “open with Edge” – was able to edit\*

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

That’s not happy \*not able to edit signature field\*

\*Saved a copy to desktop, opened saved copy in Adobe\* I’m hoping that the sign option is still there. \*Not able to sign\* It looks like it I can do something with the box in this field, but I can’t type.

**I have version 2021.005.0060 of Adobe acrobat reader DC.**

From here, I would forward this to my work computer (where I have Adobe Pro) to sign it. I am not supposed to do that because it is a work computer, but I am confident that the Adobe Pro would be able to edit the form and sign it.

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

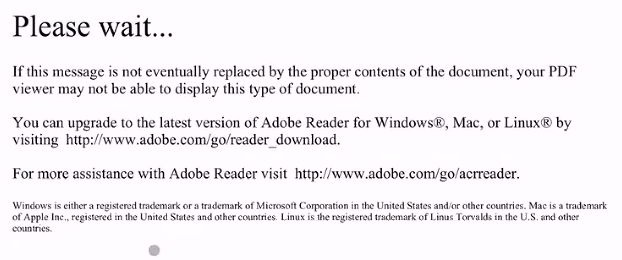
### **Task 2: [Form 10-0003k--has digital signature] - 5 minutes**

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 search, “employee scholarships.” \*Directed to correct form\*

I clicked the download link, but it doesn’t look like it worked. The window in the top right never came up – when that happens I try to click one more time. If the window still didn’t open then I would’ve opened my downloads folder to see if it worked. I see now that it downloaded twice.

\*Opened the form and got the error message below…\*



I would edit this message to give a specific amount of time that a person should wait, because “please wait” is ambiguous.

\*Right clicked the form and was able to “open in Adobe”. Able to check boxes and enter text\* The tabbing is working for this form and it looks like it is following the order that I’d expect.

* 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?*

I would click “file” and “save as” and then re-name it so that I can find it later. \*Saved, closed, re-opened – able to make new edits\*

\*Able to sign the form when right-clicked the download link on VA.gov, clicked “save link as”, and opened the file in Adobe\*

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

This is what I expected last time – it is asking me to configure a digital ID. \*able to sign\*

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 search for, “travel reimbursement” \*opened form\*

The “about this form” page does not offer any new information, so it is just an extra/unnecessary click – the other ones had “when to complete this form.”

\*Opening form in Edge gave error message again – opening in Adobe allowed them to edit\*

Signing this form is different. I would expect it to prompt me for a digital ID, but I can just type in here. I would print it and sign it that way instead.

* 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.

I know the search is not the point of this session, but the search could be better. It seems you have to know what criteria to search for to get what you want – the parameters of what is loaded are tight, so you need to know exactly what to search.

This one opened directly in the browser. \*Able to edit form\*

Just a side note: All of the other forms were last name first, but this one is in a different order.

* 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?*

\*Saved from the “save” button in browser\* I was not expecting it to refresh the page when I saved the form, but it did.

\*Not able to edit the saved copy in Adobe\* I would have to go to right click the download link, save the link, and then open it that way – like I did with the other form. \*Able to edit form when saved that way\* It doesn’t have the visual indicator that lets me know I can edit it (light blue background).

It looks like there is no option to sign this form digitally – it says you have to sign in ink.

\*Saved edits, closed form, re-opened – able to make new 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!