**Patient Check In (PCI) Conversation Guide for Unified Check-In Generative Research Usability Study**

* And, lastly, are you comfortable if I record this session today?

**Warm-Up Questions - 1 Minute**

So, before we go to the prototype, let’s start with a few warm-up questions.

* What device are you using to join this session today?
  + ***“IPhone.”***
* I will be sharing a web page link with you during this session. How would you prefer to receive the URL? For example, I could send it through the Zoom (messages) chat or email it to you.
  + ***“Zoom chat.”***
* *If the participant is using a screen reader:*
  + Are you using a screen reader or other assistive technology today? If so, what type? (For example, VoiceOver.)
    - ***“VoiceOver on iPhone.”***
  + And how would you rate your level of experience with using that technology - beginner, intermediate, advanced, or expert?
  + How long have you been using that technology?
* *If the participant is using screen magnification:*
  + Are you using a magnification tool today? If so, what type? (For example, Zoom.)
  + And how would you rate your level of experience with using that technology - beginner, intermediate, advanced, or expert?
  + How long have you been using that technology?
* Have you been to a VA health facility for a medical appointment for yourself in the last 12 months?
  + ***“Yes.”***

Great. Thank you.

**Usability Tasks**

**Pre-Check-In Text Message Tasks - 5 Minutes**

So, now we’ll review the prototype. And the prototype that we’ll be reviewing today is for the process of preparing for your upcoming medical appointments.

So, in the prototype, some things you’ll be able to select, while other things you won’t. Nothing in it is your information; it’s all just pretend.

As a reminder, I’m going to be asking you to do some specific tasks using the prototype. However, I’m going to be starting and stopping you to provide specific instructions and ask you questions along the way. Does that sound okay?

Great. So, typically the first step of the process of preparing for your upcoming medical appointments starts with the VA sending you a text message on your smartphone a few days before your appointment.

*If the participant prefers using email to receive information, skip to Instructions for Using Email.*

**Instructions for using Zoom**

So, what I’d like to do is use the Zoom (messages) chat to pretend VA is sending you a text message and have you review it. Does that sound okay?

Ok. Now go ahead and tap (or select) the screen anywhere. And, as you tap the screen you will see that menu appear at the bottom of your screen. In that menu, tap (or select) “Chat.”

Perfect. Now, let’s pretend that you have an upcoming appointment that’s on Monday, February 2 at 8:00 am. And let’s pretend that that’s in a few days from now.

Now, I’m going to send you the first text message. When you receive it, go ahead, and review the message, pretending it’s a text message that you received on your smartphone.

*Your VA appointment is on FEB 2 at 08:00.*

*Reply:*  
*Y1 to CONFIRM*  
*N1 to CANCEL*  
*D1 for DETAILS*

*For more info call 909-825-7084 options 2 or reply HELP.*

*Got a fever, cold cough, or flu-like symptoms? Stay home and phone VA first: (909) 825-7084 ext. 5085.*

*Don't catch the bug. Ask your provider to receive your flu shot! Get yours at the VA or anytime at Walgreens Pharmacy.*

*Find a location of the closest pharmacy here:*[*https://go.usa.gov/xGQk2*](https://go.usa.gov/xGQk2)

*Send STOP to end messages.*

* Great. And what would you do next?

Great. Now, I’m going to send you an automated response back. When you receive it, go ahead, and review the message.

*Your appointment for FEB 2 at 08:00 is confirmed. To prepare for your appointment, check if your information is up to date:*[*https://codepen.io/team/va-cie/live/NWORQEe*](https://codepen.io/team/va-cie/live/NWORQEe)

*Skip ahead to Pre-Check-In Text Message Task Questions.*

**Instructions for Using Email**

So, let’s pretend that you have an upcoming appointment that’s on Monday, February 2 at 8:00 am. And let’s pretend that that’s in a few days from now.

The first text message that the VA sends asks for you to confirm the date and time of your appointment. And, if you respond, "Yes" that it's correct, then the VA sends you a second text. Now, I'm going to email you what's included in that second text message. Does that sound okay?

And, when you receive that email, go ahead, and review it, but I'd like to ask you a couple questions before you take any action.

*You’ve confirmed your VA appointment on FEB 2 at 08:00. To prepare for your appointment, check if your information is up to date:*[*https://codepen.io/team/va-cie/live/NWORQEe*](https://codepen.io/team/va-cie/live/NWORQEe)

**Pre-Check-In Text Message Task Questions**

* Now, could you tell me if the information in these text messages is what you’d expect to find for an upcoming medical appointment?
  + ***“It’s pretty much what I get already. I usually get texts from the VA about my upcoming appt. I would type Y1 to confirm.”***
* Did you find any information in these texts confusing?
  + ***“No. A lot of appts you type Y to confirm. How come you guys want a 1 after it?”***
* Is there anything you would recommend changing about these texts?
  + ***“Just type Y to confirm. It makes us have to switch over to the number pad. It’s an extra step. Difficult for those with voiceovers.”***
* Great. Now, what would you do next?
  + ***“I would be done. I know my information is correct. I would close out of everything.”***

**Pre-Check-In Webpage Tasks - 15 Minutes**

Great. Now, as a reminder, some things in this prototype you can select, some things you can’t, and nothing in here is your actual information; it’s just pretend.

Now, on this page, I’d like for you to review the information on the screen, and as you’re reviewing, I would like you to talk aloud as much as possible so that you share what you’re thinking about and what, if anything, you’re unsure about before advancing to the next page. So, please start reviewing the information on the screen, but remember, don’t advance to the next page yet.

* Great. And, how easy or difficult was it to understand what to do next on this page?
  + ***“It’s easy. There is a continue button right there.”***
* Is there anything unclear to you on this page?
  + ***“I don’t know if it wants numbers for the date or dropdown. Typing in numbers can be problematic. If there are options, it would be easier. It’s normally what I would expect.”***
* Is there anything missing?
  + ***“No.”***
* Is there anything you would recommend changing or adding?

Great. So, for this session today, we don’t need you to provide your actual last name and date of birth. So, please go ahead and select the “Continue” button to advance to the next page.

*Veterans should be on the appointment list page.*

Great. Now, please start reviewing the information on this screen, but remember, don’t advance to the next page yet.

* Great. Now, without doing it yet, what would you do next on this page?
  + ***“I have to go back up the page to click ‘Review Information’. It doesn’t say it’s a link.”***
* And why would you do that next?
* And, how easy or difficult was it to understand what to do next on this page?
  + ***“Why would I come to this page to begin with? Would this link come after the Y1 message? If it wants me to review my information, it should just take me there. Why am I reviewing extra appts? With a screen reader, it’s a pain. I have to go line by line on the page.”***
* Is there anything unclear to you on this page?
  + ***“Is ‘Details’ on multiple places on this page? I don’t know if it is multiple times on this page or it’s reading this link over and over. Now it says, ‘Confirm your appt’. It isn’t saying link or button to me. I would only expect to hear ‘Review information’ once. Redundancies can be confusing.”***
* Is there anything missing?
* Is there anything you would recommend changing or adding?
  + ***“Link going straight to review my information.”***

Great. Now, let’s go ahead and proceed to the next page.

*Veterans should be on the first pre-reg question page.*

Now, for these next three pages, go through the information on the screen and then select “Yes” to each question to advance to the next page. And let’s pretend that all of your contact information is correct.

*Veterans should be on the pre-check-in confirmation page. “Your contact information is up to date.”*

Perfect. So, again, please start reviewing the information on this screen, but remember, don’t advance to the next page yet.

* Great. And what information on this page is most important to you?
* Is there anything unclear to you on this page?
  + ***“I read my name and address and then a ‘yes’ or ‘no’. I skipped over the top part. Now I see and it makes more sense. It’s going to drop focus on the top of the page. I don’t want to read the different languages. My finger will go down the page because I don’t want to read the junk at the top.”***
  + ***“There is another link for ‘Details’. Details for what? I have no idea. I read it all and still don’t know why I’m here. The only thing different than the other pages is the directions. I’ve read this information at least twice now. I find it annoying. I made sure my information was correct and now I don’t know why I’m here anymore. I would call that page ‘Directions’ or something instead of ‘Details’.”***
* Is there anything missing?
* Is there anything you would recommend changing or adding?
* Great. Now, without doing it yet, what would you do next on this page?
  + ***“That little text is costing me a lot of time. I’m not convinced I need to do this. I would just check MHV if needed. I know where all of this info is.”***
  + ***“If I don’t need to do anything else, I would close this page. I’ll wait until I receive the appt link.”***
* And, from this page, how would you find out if you had other upcoming appointments that needed to be reviewed?
  + ***“I wouldn’t expect to be able to cancel appts from that text. A text is supposed to be a quick thing. All of this stuff doesn’t matter. Unless I need to change my information, why would I keep looking at it?”***

*Veterans should be reviewing the “manage appointments” component on the pre-check-in confirmation page.*

* Great. And, how easy or difficult was it to find out if your other upcoming appointments needed to be reviewed too?
  + ***“I’ve read all of this stuff 3 times now. Having a screen reader reading this over and over again is annoying. If there is a link to review appts, it shouldn’t have been on the first page. The text wasn’t about all of this other stuff.”***
* And is there anything you would recommend doing to make this information easier to find?
  + ***“It said I was just going to review my appts so I wouldn’t expect to do anything besides reading it. I am getting too much information. It needs to be simple, or we won’t do it.”***

Great. Now, let’s go ahead and review your other upcoming appointments.

*Veterans should be on the pre-check-in appointments list page.*

Go ahead and start reviewing the information on this screen, but remember, don’t advance to the next page yet.

* Great. And what information on this page is most important to you?
  + ***“It tells me my appt is confirmed. It told me I did what I was wanting to do.”***
* Is there anything unclear to you on this page?
  + ***“If this was the new MHV interface, some of this would make since. I thought I already confirmed with the Y1 text. So, this is another appt? Ok. So, I can confirm all of my appts here.”***
  + ***“Am I supposed to forget the text? Is this my new method to take care of appts? This is too much information. I should be working on one specific task. I shouldn’t have options to go through all of these other things.”***
* Is there anything missing?
* Is there anything you would recommend changing or adding?
  + ***“Having too many ways to get to a certain point is not good. Managing appts and reviewing them is fine.”***
* Great. Now, without doing it yet, what would you do next on this page?
* And, how easy or difficult was it to understand what to do next on this page?
* And how would you recommend that we make it easier to understand what to do next on this page?

Great. Now, let’s go ahead and proceed to the next page.

*Veterans should be on the pre-check-in confirmation page. “You’ve confirmed your appointment.”*

Perfect. So, again, please start reviewing the information on this screen, but remember, don’t advance to the next page yet.

* Great. And what information on this page is most important to you?
* Is there anything unclear to you on this page?
* Is there anything missing?
* Is there anything you would recommend changing or adding?
* Great. So, overall, how easy, or difficult has it been to complete this process?
* And, why?
* And, overall, has there been any information or any step that’s been unclear?
* And, overall, has there been anything that you would change or add about this process to make it easier?

Great. Thank you.

**Check In Tasks - 15 Minutes**

So, again, let’s pretend that you selected the link from your text message, and it opened this page.

Now, please start reviewing the information on this screen, but remember, don’t advance to the next page yet.

Great. And again, for this session today, we don’t need you to provide your actual last name and date of birth. So, please go ahead and select the “Continue” button to advance to the next page.

*Veterans should be on the check-in appointment list page.*

Perfect. So, again, please start reviewing the information on this screen, but remember, don’t advance to the next page yet.

* Great. Now, without doing it yet, what would you do next on this page?
* And why would you do that next?
* And, how easy or difficult was it to understand what to do next on this page?
* Is there anything unclear to you on this page?
* Is there anything missing?
* Is there anything you would recommend changing or adding?

Great. Now, let’s go ahead and proceed to the next page.

*Veterans should be on the first travel reimbursement question page.*

Now, for the next four pages, go through the information on the screen and then select “Yes” to each question to advance to the next page.

*Veterans should be on the check-in confirmation page.*

Perfect. So, again, please start reviewing the information on this screen, but remember, don’t advance to the next page yet.

* Great. And what information on this page is most important to you?
* Is there anything unclear to you on this page?
* Is there anything missing?
* Is there anything you would recommend changing or adding?
* Great. Now, without doing it yet, what would you do next on this page?
* And, from this page, how would you find out if you had other upcoming appointments that needed to be reviewed?

*Veterans should be reviewing the “manage appointments” component on the check-in confirmation page.*

* Great. And, how easy or difficult was it to find out if your other upcoming appointments needed to be reviewed too?
* And is there anything you would recommend doing to make this information easier to find?

Great. Now, let’s go ahead and review your other upcoming appointments.

*Veterans should be on the check-in appointment list.*

Go ahead and start reviewing the information on this screen, but remember, don’t advance to the next page yet.

* Great. And what information on this page is most important to you?
* Is there anything unclear to you on this page?
* Is there anything missing?
* Is there anything you would recommend changing or adding?
  + ***“I would want a drop down for the months so I wouldn’t have to go through the entire page.”***
* Great. Now, without doing it yet, what would you do next on this page?
* And, how easy or difficult was it to understand what to do next on this page?
* And how would you recommend that we make it easier to understand what to do next on this page?

Great. Now, let’s go ahead and proceed to the next page.

*Veterans should be on the “You’ve confirmed your appointment” page.*

Perfect. So, again, please start reviewing the information on this screen, but remember, don’t advance to the next page yet.

* Great. And what information on this page is most important to you?
* Is there anything unclear to you on this page?
* Is there anything missing?
* Is there anything you would recommend changing or adding?
* Great. So, overall, how easy, or difficult has it been to complete this process? And, why?
* And, overall, has there been any information or any step that’s been unclear?
* And, overall, has there been anything that you would change or add about this process to make it easier?

Great. Thank you.

**Post-Tasks Questions - 5 Minutes**

Now, I have just a couple follow up questions for you about the two prototypes that you reviewed today.

* So, overall, how easy, or difficult was it to understand the difference between the process of preparing for an upcoming appointment versus checking in to an appointment? And, why?
* And, overall, how easy, or difficult was it to understand that you still have to complete the check in process even though you completed the process for preparing for your upcoming appointment a few days before? And, why?
* And, overall, how helpful did you find it to be able to review all of your other upcoming appointments during the process of preparing for an upcoming appointment and checking in to an appointment? And, why?
* And would you find it more helpful to receive a text message from the VA when it’s time to check in for your appointment or find instructions on how to check in written on a poster hanging on the wall at the clinic? And, why?
* Great. And, if the VA were to send you a text message when it’s time to check in for your appointment (on the day of your appointment), would you prefer to receive one message before each of your appointments? Or one message at the start of the day? And, why?

**Closing - 1 Minute**

Great. Thank you. Well, that is all the question I have for you today. Is there anything else that we haven’t talked about that you’d like to share with me?

Great. 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 the appointment check-in process and make sure it really works for Veterans.

Thank you for your feedback and thank you again so much for joining us today.

Have a great rest of your day.