**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 11.”***
* 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.)
  + 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?
  + ***“I’ve seen that several times. I can remember clicking and going through the process several times. Informative and no issues.”***
* Did you find any information in these texts confusing?
  + ***“Less information the better. Simplify and get rid of useless information.”***
* Is there anything you would recommend changing about these texts?
  + ***“More of a step process. Some of the verbiage can be confusing due to the format on the phone. Some people will look through and not fully understand it.”***
* Great. Now, what would you do next?
  + **“Y1.”**
  + **“Click on the link.”**

**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?
  + ***“Very simple.”***
* Is there anything unclear to you on this page?
  + ***“No. Everything stood out.”***
* Is there anything missing?
* Is there anything you would recommend changing or adding?
  + ***“Continue button is self-explanatory but maybe ‘To continue press here’ or if you need help, having steps.”***

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?
  + ***“Click ‘Review your information now’ right away. The instructions were to review my contact info.”***
* And why would you do that next?
* And, how easy or difficult was it to understand what to do next on this page?
  + ***“Easy.”***
* Is there anything unclear to you on this page?
  + ***“No. I got fixated on my upcoming appts.”***
* Is there anything missing?
  + ***“No. It’s all self-explanatory.”***
* 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 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?
  + ***“I like that they will let me know when to check in. Appt is bold and clear. Upcoming appts are on there as well.”***
* Is there anything unclear to you on this page?
  + ***“’Manage appts’ was confusing. Maybe ‘Manage upcoming appts’ so it’s not confusing for the current appt.”***
  + ***“The 3 questions on the bottom are odd. I just reviewed my info. Why do I need to again?”***
  + ***“’It’s time to confirm or check in for other appts now’ is confusing. I would be questioning why it’s on there now and why they want me to check-in to another appts when I’m at an appt now.”***
* Is there anything missing?
  + ***“No. Has everything I would need.”***
* Is there anything you would recommend changing or adding?
* Great. Now, without doing it yet, what would you do next on this page?
  + ***“Click ‘Details’ to see if there is something in there.”***
* And, from this page, how would you find out if you had other upcoming appointments that needed to be reviewed?
  + ***“Click ‘Review upcoming appts’.”***

*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?
  + ***“Not difficult at all.”***
* And is there anything you would recommend doing to make this information easier to find?
  + ***“Maybe the verbiage to manage future appts. Be more specific on that.”***

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?
  + ***“Click to confirm your appt. Once again, I’m confused.”***
* Is there anything unclear to you on this page?
  + ***“No.”***
  + ***“What would happen if I clicked ‘Details’? Ok, that’s helpful information.”***
* Is there anything missing?
* Is there anything you would recommend changing or adding?
  + ***“I would change it to ‘Confirm your upcoming appt’ so people aren’t confused.”***
* 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?
  + ***“Pretty easy.”***
* 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?
  + ***“Probably the date and time. I found it confusing that my provider will call me. Will they call me a few days out? I forgot this was a phone call. That makes more sense now.”***
  + ***“No text under the ‘Review upcoming appts’ is clear. I would only click on that if I needed a reminder.”***
* Is there anything unclear to you on this page?
* Is there anything missing?
* Is there anything you would recommend changing or adding?
  + ***“Maybe preface it. ‘Since this is a phone appt, your provider will call you.’”***
* Great. So, overall, how easy, or difficult has it been to complete this process?
  + ***“Very user friendly.”***
* And, why?
* And, overall, has there been any information or any step that’s been unclear?
  + ***“With the exception of my suggestions, no, everything has been clear.”***
* And, overall, has there been anything that you would change or add about this process to make it easier?
  + ***“Just the things we discussed. I like everything else.”***

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?
  + ***“Simple.”***
* Is there anything unclear to you on this page?
  + ***“No.”***
* Is there anything missing?
* Is there anything you would recommend changing or adding?
  + ***“Change it to ‘Check-in to today’s appt’.”***

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?
  + ***“I like that they are processing the reimbursement already.”***
  + ***“I’m checked in.”***
* Is there anything unclear to you on this page?
  + ***“No.”***
* Is there anything missing?
  + ***“No.”***
* Is there anything you would recommend changing or adding?
* Great. Now, without doing it yet, what would you do next on this page?
  + ***“Probably be looking for a ‘Complete’ or ‘Finalize’ button. I don’t see anything like that so I would close the page.”***
  + ***“Maybe add ‘You’re checked in. Have a great visit.’ or something. Send to a page to get out of the app.”***
* And, from this page, how would you find out if you had other upcoming appointments that needed to be reviewed?
  + ***“’Manage appts’ or should say ‘Future appts’.”***

*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?
  + ***“Why are they having me check in? Is this the very next upcoming appt? I didn’t notice you can check-in starting at 3:15. Maybe make that more colorful and bigger.”***
* Is there anything missing?
* Is there anything you would recommend changing or adding?
  + ***“None of the other appts have anything about confirming. Why is that one the only one I have to confirm? Why not Wednesday’s appt? I think that it’s already confirmed. I would add some information on there that says ‘Confirmed’ so the individual knows.”***
* Great. Now, without doing it yet, what would you do next on this page?
  + ***“Click on the ‘Details’.”***
* 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?
  + ***“Easy.”***
* And, overall, has there been any information or any step that’s been unclear?
  + ***“No.”***
* And, overall, has there been anything that you would change or add about this process to make it easier?
  + ***“Nothing additional than I’ve already mentioned.”***

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?
  + ***“Relatively easy. It’s user friendly and I feel comfortable doing it. I didn’t have to read long paragraphs. Clear and to the point.”***
* 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?
  + ***“Relatively simple due to the information provided.”***
* 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?
  + ***“Relatively simple.”***
* 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?
  + ***“I would prefer a text. I’m so used to that. Posters can be often ignored because there is so many information signs. Could be easily overlooked.”***
* 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?
  + ***“One message for each. Having reviewed this, I’m going to have the information I need for future appts.”***

**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.