**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.)
  + 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?
  + ***“Yes.”***
* Did you find any information in these texts confusing?
  + ***“I think just having one sentence for the appt being confirmed and then to prepare. Do you have to check your information? Some people just want to know their appt is confirmed. I would probably not check my information and say, ‘yes it’s confirmed’. I think that can be done in check-in.”***
* Is there anything you would recommend changing about these texts?
  + ***“The first one seems more about the flu bug and pharmacy than my appt. I don’t know if that’s necessary.”***
* Great. Now, what would you do next?
  + ***“Type in ‘Y1’.”***
  + ***“No.”***

**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?
  + ***“Easy. As far as needing help, are these resources going to answer the phone? Our VA never answers the phone. I don’t know how accurate it is to list these contacts.”***
* Is there anything unclear to you on this page?
  + ***“No.”***
* Is there anything missing?
* Is there anything you would recommend changing or adding?
  + ***“No. I think it’s pretty self-explanatory.”***

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 would review the information with the link on the 2nd.”***
* And why would you do that next?
  + ***“It’s listed twice. Once with a green arrow.”***
* 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?
  + ***“Is it listed twice as a reminder? I think the top is clean cut because the green arrow. I don’t think there needs to be a second.”***
* Is there anything missing?
  + ***“Don’t they usually tell you when to check-in? If my appt is at 8am, I will be there by 7:45am but I don’t know if having that on there would be helpful. I am a nurse and it’s just a career frustration.”***
* 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?
  + ***“To verify my appt is again at 8am in person. I probably wouldn’t look for upcoming appts until I have that appt.”***
* 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?
  + ***“If I’m going in-person to the VA, I wouldn’t need to check-in. So I don’t think there is anything else I need to do.”***
* 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 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?
* 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 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?
* Is there anything unclear to you on this page?
  + ***“I have other appts before. I don’t know why it’s focused at the top for the 9th.”***
* 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, 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?
  + ***“That it’s a phone appt so I don’t need to go into the VA.”***
* Is there anything unclear to you on this page?
  + ***“Is this a Zoom call? What’s the link here to get into this call?”***
* Is there anything missing?
* Is there anything you would recommend changing or adding?
  + ***“Have something to verify or list the mobile number for the provider to call. Some people have multiple phones.”***
* Great. So, overall, how easy, or difficult has it been to complete this process?
  + ***“Easy.”***
* And, why?
  + ***“Just a tab.”***
* And, overall, has there been any information or any step that’s been unclear?
  + ***“Not really.”***
* And, overall, has there been anything that you would change or add about this process to make it easier?
  + ***“I didn’t confirm the other appts. I was expecting for it to confirm each one. Where would I know that it’s confirmed? It doesn’t say confirmed anywhere. ‘Appt already confirmed’ or some statement.”***

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?
  + ***“Follow the green arrow ‘Check in now’.”***
* And why would you do that next?
  + ***“It’s bolded. I like arrows it’s different than the rest.”***
* 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?
  + ***“’Check in now’ repeats itself. I don’t think it’s needed. It’s confusing.”***
* Is there anything missing?
  + ***“No very clear.”***
* 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?
  + ***“That I am check-in and if I’m doing travel, it’s processed.”***
* Is there anything unclear to you on this page?
  + ***“No.”***
* Is there anything missing?
  + ***“No.”***
* Is there anything you would recommend changing or adding?
  + ***“I think it’s pretty clear.”***
* Great. Now, without doing it yet, what would you do next on this page?
  + ***“If I wanted to look at future appts, I would click that. But if not, I would be done.”***
* And, from this page, how would you find out if you had other upcoming appointments that needed to be reviewed?
  + ***“I would use an arrow button again. To me, it looks like it’s not a requirement.”***

*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?
  + ***“My appt for the 2nd is time to check-in. I would have something say it’s a CT scan at the top. That’s confusing to me as a nurse.”***
* Is there anything unclear to you on this page?
  + ***“No.”***
* 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?
  + ***“Correct answer is to probably confirm my appt for mental health. I would be more focused on my appt today. It wouldn’t be a priority.”***
* 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?
  + ***“No.”***
* 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. It was basically a click.”***
* And, overall, has there been any information or any step that’s been unclear?
  + ***“No but I would use the same green arrow for all the cues.”***
* And, overall, has there been anything that you would change or add about this process to make it easier?
  + ***“No.”***

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?
  + ***“Easy. The wording is self-explanatory.”***
* 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?
  + ***“Easy. I think any Veteran knows that.”***
* 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?
  + ***“A little confusing to me. I prefer to focus on the one that needs to be confirmed or checked in to.”***
* 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?
  + ***“Text. I’m not going to look at a poster. Text gets attention quickly.”***
* 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 that day. I don’t want my phone beeping multiple times.”***

**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.