**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.”***
* *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?
  + ***“Reply Y1.”***

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?
  + ***“The first one was longer than I expected.”***
* Did you find any information in these texts confusing?
  + ***“Yes. I was only expecting to see a confirmation for my appt. It seems the VA wants me to take action with the highlighted text.”***
* Is there anything you would recommend changing about these texts?
  + ***“Get rid of the cold and flu shot. Maybe a header for additional information would be helpful. The pharmacy part is not clear.”***
  + ***“Once an appt is confirmed, I don’t do anything with it expect add to my calendar. If it was worded differently, I might click the link. ‘Please review this information but know your appt is confirmed’.”***
* Great. Now, what would you do next?
  + ***“Add the appt to my calendar and ignore it. I make sure my info is correct with the VA frequently. I use VA.gov frequently and I receive prescriptions in the mail so it’s important I keep everything up to date.”***

**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?
* Is there anything unclear to you on this page?
  + ***“This stuff doesn’t have anything to do with confirming my appt. I prefer it’s all in one spot than multiple pages. I see it with the VA all the time.”***
* Is there anything missing?
* Is there anything you would recommend changing or adding?
  + ***“I dislike these pages. Anytime I call into the VA or providers, I have to give 5 different items (name, phone, address, email, etc.). If you’re transferred, you have to give to next person. This info makes me angry. Last name and date of birth isn’t too bad. Repeating the info multiple times is not my favorite thing to do.”***

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?
  + ***“Brief and to the point. Layout is easy to see and clear.”***
  + ***“I wouldn’t do anything. I reviewed it and it looks correct to me. I would close it. I usually ignore ‘Review your information now’.”***
* 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 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’ve never been prompted to bring my insurance cards before. That’s interesting.”***
  + ***“Checking the date, time, and provider.”***
* Is there anything unclear to you on this page?
  + ***“When I’ve been to different facilities, their check in process is not consistent. It would be better to do on the phone.”***
* Is there anything missing?
  + ***“Is there a link to change my appt? Add that under ‘Manage appts’.”***
* 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?
  + ***“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?
  + ***“Very easy.”***
* 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?
  + ***“Apparently, I haven’t confirmed this appt. I would stop what I’m doing and confirm it.”***
* 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, 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?
  + ***“No. I like that it includes a 15 min window info for phone call.”***
* 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?
  + ***“Very easy compared to the current system.”***
* And, why?
* And, overall, has there been any information or any step that’s been unclear?
  + ***“If I click ‘What if I have questions about my appt?’ will it show me the regional details? I’ve had questions in the past about what I need to do before an appt (what to bring, drink, eat, etc.). In that information is there someone I can contact?”***
* 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?
  + ***“Click ‘Check in now’.”***
* And why would you do that next?
  + ***“Prompted by the text that I need to check in.”***
* And, how easy or difficult was it to understand what to do next on this page?
  + ***“I thought the check in was when I was putting in my name and birthday, but I guess it’s 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?
  + ***“What if I need a wheelchair or an elevator? I see I would call the 411 number.”***
* Is there anything you would recommend changing or adding?
  + ***“I would want to check in first and file my travel reimbursement last. I was going to check in. I wasn’t expecting to see it. Maybe more of a transition or check list of what will be asked.”***
  + ***“Information on which clinic/location to go to.”***
* 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?
  + ***“Click ‘Review upcoming 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?
  + ***“It was easy I like that.”***
* 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?
  + ***“I like the chronological order.”***
* Is there anything unclear to you on this page?
* Is there anything missing?
  + ***“No. I like this page.”***
* Is there anything you would recommend changing or adding?
  + ***“Is there a way to add facility maps? Small link to find which clinic.”***
* Great. Now, without doing it yet, what would you do next on this page?
  + ***“No. My expectation for this page is to see my upcoming appts. I wouldn’t confirm an appt out because I’ve been conditioned that the VA is going to send me a text. I’m usually just on VA websites for information.”***
* 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?
  + ***“I’m not sure I like that. When I clicked the link, I was expecting an option to confirm, cancel, or get details like the text. Not automatically confirm.”***
  + ***“If I confirmed here, I wouldn’t expect a text to confirm. If I did, I think I would be annoyed.”***
* 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?
  + ***“Pretty easy. I like it.”***
* And, overall, has there been any information or any step that’s been unclear?
  + ***“No. Only thing that makes me nervous is having last second questions. A quick call to the clinic. I would have to go into a different system to find that.”***
* And, overall, has there been anything that you would change or add about this process to make it easier?
  + ***“No. I’m not sure how you’d make it easier. Very quick and convenient.”***

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?
  + ***“I didn’t have a problem. Everything was clear. A new person to the system might have some confusion.”***
* 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?
  + ***“A first time user might be confused but after they get it down, it’s good.”***
* 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?
  + ***“Perfect. This layout is clean.”***
* 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 message. Unless someone is directing you to the poster, you don’t know to look there. Especially if it’s a busy day. If I get a text, it’s so easy and user friendly.”***
* 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. If I check in for the first one, I’m there. If I don’t check in to the first one, you can assume I won’t make the rest.”***

**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?

***“The VA process is very painful. Technology wise, they are getting better. I can’t speak for the older vets that don’t like technology. I think it’s going in the right direction.”***

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.