Multi-channel Technologies (MCT)

Virtual Agent Chatbot Research Facilitation Guide

Date updated: May 26, 2023

Primary point of contact: Matthew Terwilliger ([Matthew.Terwilliger@VA.gov](mailto:Matthew.Terwilliger@VA.gov))

[Overview 1](#_Toc169285731)

[Team 1](#_Toc1834147606)

[Background 1](#_Toc1562936430)

[Key Objectives 1](#_Toc710454831)

[Questions by Topics 1](#_Toc1652852524)

[One-on-One Interviews 2](#_Toc873929811)

[VA chatbot prototype 2](#_Toc1436421241)

[Agenda 3](#_Toc2113890344)

[Virtual Agent Chatbot Interview 4](#_Toc747638345)

[Background Questions 4](#_Toc1260555433)

[Chatbot Testing 4](#_Toc1883591625)

[Scenario: 4](#_Toc1916073097)

[Scenario: 8](#_Toc540294100)

[Closeout 8](#_Toc412215647)

# Overview

Team  
Department of Veteran Affairs (VA) VEO Multi-Channel Technologies (MCT) – Virtual Agent Chatbot Research

## Background

The VA Multi-channel Technology (MCT) team seeks to use human-centered design (HCD) research methods to evaluate Veteran expectations and desired experiences for the VA chatbot, specifically as it relates to the user entering and exiting the prescription feature and using the voice option to request a refill.

User research will focus on testing the understanding and perceived usability of the chatbot’s prescription feature. This will be done by allowing the user to interact with the voice option to refill a prescription and by entering and exiting this specific feature of the chatbot which will inform future iterations of the chatbot. Additionally, user research will help identify pain points or opportunities for improvement for users.

## Key Objectives

* Understand user expectations and desires around the usability and interactions of the prescription voice option within the chatbot.
* Gauge the general usability and user’s understanding of entering and exiting the prescription feature.

### Questions by Topics

|  |  |
| --- | --- |
| High Priority | |
| ***Topic*** | ***Supporting Questions*** |
| Entry and exit of prescription feature | 1. Is it clear to users this is its own chatbot area with only a prescription specific domain of knowledge? 2. How do users expect to exit prescriptions? 3. Is it clear how to exit or return to the main chatbot? 4. Do users think there is anything missing, difficult, or unexpected about entering/exiting the prescription feature? 5. How does this compare to other chatbots? |
| Voice | 1. How do users expect to interact with the voice feature? 2. Do users think there is anything missing, difficult, or unexpected about the voice feature? 3. How does this compare to other voice-led chatbots? |

### One-on-One Interviews

In the first 10 minutes of the session, the team will ask a series of questions to understand in what way Veterans expect and desire to interact with the VA chatbot. One-on-one interviews allow the team to probe into the user’s past experiences and identify significant expectations or concerns for their future service interactions.

Benefits

* One-on-one interviews are designed to aid the facilitator in conducting the interview
* The conversational structure of the interview allows the facilitator the ability to react to a user’s response, improves a line of questioning that might result in unexpected findings, and reduces bias by gathering user responses before beginning the activity

Limitations

* Users may withhold information from the research team
* What the user says may not always match their real-life interactions

### VA chatbot prototype

Following the interview portion, the team will present the participant with a prototype of the prescription feature within the VA chatbot. The moderator will guide users through two scenarios that will help inform the mode of entry and exit from the prescription feature and the way the user interacts with the voice option.

Benefits

* The proposed prototype will be very close to what users will be able to access on VA.gov, allowing for accurate feedback and realistic experience.
* The facilitator can observe the habits and behaviors that a user may not realize themselves

Limitations

* The prototype may not be able to access the user's microphone resulting in a less realistic voice experience.

Facilitation Guide

Introduction

***\*Note to Facilitator to turn on camera and enable screensharing. If necessary, change observers’ names in Zoom to “Observer.”***

***Introduction Script.***

Thank you for taking the time to give us your feedback. My name is [*insert name*], and I will be facilitating today’s testing session. [*Optional: Introduce government observers and others present.*]

We are working to improve the user experience of interacting with the VA chatbot and get a better understanding of the upcoming prescription feature. Our goal is to gather feedback on this prototype you’ll see today and see if this matches Veterans desires and expectations.

With your permission, we are going to document this session using written notes, audio, and/or video recording. We will only use the information you share with us for research and analysis, and we will not share it with anyone outside of our project team at VA. Do you understand these guidelines and consent to this interview being documented via written notes, screenshots, audio and/or video recording?

Great, thank you. I will begin the recording and then ask again for our records.

[Ask again]

Before I go over the agenda for today’s session, I also wanted to let you know that your participation is entirely voluntary, and we can stop at any time. You are welcome to decline or skip any question. In our notes, we will remove any personally identifying information such as your name or benefit eligibility status, and combine them with other participants’ information, so no feedback will be directly tied to you. Is that all right?

## Agenda

To give a quick **overview** of what we will run through, here is our agenda for today:

This session is set to be no more than 60 minutes. In a moment I am going to ask you to share your screen while we are testing the prototype and turn on your camera if you feel comfortable doing so. Let me know if you need help sharing your screen.

We will ask you to go through the prototype that we will share in just a moment. It is important to remember that we are not testing you, we are testing the product. You cannot do anything wrong here.   
   
As you go through today’s session, please think aloud as much as possible. Describe what you are looking at, what you are trying to do, and what you are thinking. We especially want to know if there is anything you like or do not like, or if there is anything you find confusing. We want your complete honesty.   
   
Throughout the exercise, I will ask a few questions to better understand your thoughts and opinion.

After we complete all the tasks, I will ask you about your overall impressions of the experience and take note of any general comments you have. I cannot stress enough your honest feedback will help us make a better chatbot. Please do not hold back. Even small or nitpicky things are helpful. You will not hurt our feelings if you are brutally honest!

Do you have any questions at this point?

## Virtual Agent Chatbot Interview

Background Questions

Before we begin the interview, I have just a few general questions to get us started.

* **How familiar are you with VA.gov?** 
  + **[*If familiar*] How often do you visit the site?**
* **Are you familiar with the chatbot on VA.gov?**
* **Have you ever gotten any prescriptions through the VA?**
* **How do you typically go about refilling them?**
* **What types of devices do you use to access VA.gov?** 
  + **What types of assistive technologies do you use to interact with VA.gov (Screen Reader?)**
* **Do you have experience interacting with other non-VA chatbots?** 
  + **[*If so*] Have you used one that had a voice feature?**
  + **[*If so*] What did you think?**
* **Do you have experience using voice assistants like Alexa, Siri, Google, or devices like Google Home, Amazon Echo?** 
  + **[*If so*] What did you think?**
* **If VA’s chatbot had a voice option, how would you expect to use/interact with it?**
* **How would you describe your familiarity with technology?**

## Chatbot Testing

Thank you for your answers so far. Now let’s move on to our activity. To get started, please open a web browser, and share your screen. Then, I will send over the link to the chatbot prototype.

***Instructions for Facilitator.***

1. Send over chatbot prototype Link:

<https://xd.adobe.com/view/c97e3903-3451-4696-9f87-d9cde5d83eaf-9c2d/?fullscreen&hints=on>

Any questions, comments, or concerns so far? Great! Let’s begin.

### Scenario:

As a Veteran, you’re looking to refill a prescription.

|  |  |  |
| --- | --- | --- |
| **Chatbot Prototype** | | |
| **Testing Feature** | **Pertinent Notes – Utterances and Actions** | **Solution — desired user action** |
| **Screen/Step:**  VA chatbot home  **Interaction:**  Button options –  "Start chat” | [O*bserve]*  *How does the user interact with the chatbot?*  [Ask]   * What would you do here?   *Note user utterance and actions.* | User selects “start chat” |
|  |
|  |
| **Screen/Step:**  VA chatbot welcome  **Interaction:**  None | [O*bserve]*  *How does the user interact with the chatbot?*  *Note user utterance and actions.* |  |
| **Screen/Step:**  Authentication 1  **Interaction:**  Button options –  Yes, No | [O*bserve]*  *How does the user interact with the chatbot?*  *Note user utterance and actions.* | User selects “yes” |
| **Screen/Step:**  Authentication 3  **Interaction:**  None | [Ask]   * With the interactions you’ve had with VA, would you expect this experience to be like this?   *Note user utterance and actions.* |  |
| **Screen/Step:**  Prescription about  **Interaction:**  Button options –  Continue | [Ask]   * What do you think about the level of information the bot provided here?   *Note user utterance and actions* | User selects “Continue” |
| **Screen/Step:**  Prescription welcome  **Interaction:**  Button options –  Request Refills, Microphone | [Ask]   * (Let’s take a minute) What do you think of this information and this new layout? (Anything stick out or confusing?) * Looking at this screen, how do you think you’d communicate with the chatbot? * What do you think might happen if we were to click on the microphone? * What do you think would happen if you were to ask for something that isn’t prescription related?   *Note user utterance and actions.* | User selects Microphone |
| **Screen/Step:**  Microphone approve  **Interaction:**  Button options –  Allow | [Ask]   * Is this something you expected?   *Note user utterance and actions.* | User selects “Allow” |
| **Screen/Step:**  Microphone on  **Interaction:**  Voice options –  Request Refills | [O*bserve]*  *Is the user inclined to speak or click the “Request Refills” button?*  *Note user utterance and actions.*   [Ask]   * What are your initial thoughts here? What do you think is happening? * Is this something you expected? * What would you do or say here?   *Note user utterance and actions.* |  |
| **Screen/Step:**  1st prescription  **Interaction:**  Voice options –  Yes, No | [Ask]   * (Let’s take a minute) What do you think of this information the bot gives you here. * With the interactions you’ve had with VA, would you expect this experience to be like this?   *Note user utterance and actions.* | User selects “Yes” |
| **Screen/Step:**  Confirm Order  **Interaction:**  Voice options –  Place order, back | [Ask]   * Did this match your expectations? * Now that you’ve seen how the voice option works a few times, what do you think of it? * How does this compare to the way you expected to use the voice option? * What do you think of the voice message automatically sending here once you stop speaking?   *Note user utterance and actions.* | User selects “Place order” |
| **Screen/Step:**  Order placed  **Interaction:**  Voice options –  Yes, no | [Ask]   * Did this match your expectations?   *Note user utterance and actions.* | User selects “Yes” |
| **Screen/Step:**  2nd Prescription  **Interaction:**  Voice options –  Yes, no | [Ask]   * Now we’re at your second prescription, what do you think of the prescription refill process?   *Note user utterance and actions.* | User selects “No” |

### Scenario:

As a Veteran, you’re looking to find out about the status of your decision letters for your VA claim.

|  |  |  |
| --- | --- | --- |
| **Chatbot Prototype** | | |
| **Testing Feature** | **Pertinent Notes – Utterances and Actions** | **Solution — desired user action** |
| **Screen/Step:**  Microphone on  **Interaction:**  Button options –  Request refills, Exit | [O*bserve]*  *Does the user know they have to exit to ask that question?*  [Ask]   * What would you do here? Why?   *Note user utterance and actions.* | User selects “Exit” or “Decision letters”. |
|  |
|  |

Follow-Up Questions 

1. Did this experience meet your expectations of the VA chatbot Prescriptions feature?
   * Why or why not?
2. Was there anything that frustrated you?
3. Was there anything you were pleasantly surprised about?
4. Overall, how did you feel about the voice interaction with the chatbot?
5. After seeing this experience, would this change how you’d normally refill a prescription?
6. Is there anything you would change (Magic wand)?

## Closeout

Great, thank you for your feedback today.

[*Optional: I’m going to take a moment now to open it up to my teammates on the line to see if they have any questions that they might like to ask*.]

Again, on behalf of our team, I would like to thank you for your time today. Your feedback and insights will play a key role in helping us build an accessible and helpful chatbot experience.

Thank you and enjoy the rest of your day!