Multi-channel Technologies (MCT)

Virtual Agent Chatbot Research Facilitation Guide

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# Overview

## 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 refilling, tracking, and listing prescriptions.

User research will focus on testing the understanding and desired experience for Veterans seeking self-service functionality in managing their prescriptions through the VA chatbot. This will be done by allowing the user to interact with the chatbot and navigating through the prescription refill process. Additionally, user research will help identify pain points or opportunities for improvement for users.

## Key Objectives

* Understand user expectations and desires around the information and interactions the VA chatbot can provide about refilling, tracking, and listing prescriptions.
* Gauge the desirability and usefulness of the voice feature for refilling prescriptions.

### Questions by Topics

|  |  |
| --- | --- |
| High Priority | |
| ***Topic*** | ***Supporting Questions*** |
| Prescription Management | 1. Do users think there is anything missing, difficult, or unexpected about the refilling, tracking, or listing prescriptions processes? 2. Do users think there is anything missing, difficult, or unexpected about the voice feature? |
| **Medium Priority** | |
| ***Topic*** | ***Supporting Question*** |
| Prescription Management | 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? |

### 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 link to the VA chatbot in the development environment. The moderator will guide users through **two** scenarios that will help inform the prescription refill process and identify any associated pain points.

Benefits

* The development environment for the VA chatbot 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 HCD team is reliant on the user’s access to the internet and their ability to navigate remote conferencing platforms such as Zoom

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 long have you received health care from VA?**
* **What VA health services do you primarily use—if you don’t mind me asking?**
* **Do you seek care from any non-VA providers?**
* **How would you describe your familiarity with technology?**
* **What VA tool/method do you currently use to manage or refill your prescriptions?**
* **How do you feel about the current tool you use to manage your prescriptions?**
* **Do you have experience using voice assistants like Alexa, Siri, Google, or devices like Google Home, Amazon Echo?** 
  + **[*If so*] What did you think?**
* **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 recent experience with non-VA health care providers or tools? If yes:**
  + Have you used these tools to fill prescriptions?
  + How do you feel about the [platform/tool’s] current features surrounding managing your prescriptions?
  + What about [platform/tool] makes it useful to you in managing your prescriptions? What does it excel in?
  + Do you feel that there’s something unique that [tool/company] provides?
  + What could VA learn from [tool/company]? And how could VA incorporate some of the characteristics of [service] into their own offerings?
  + Have you used these tools to obtain medical records?
  + How do you request access to your medical records through [platform/tool]? How do you feel about the experience this [platform/tool] offers to obtain these documents?
  + What features makes this experience convenient for you, if any?
  + What could VA learn from [tool/company]?

## 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 link:

<https://dev.va.gov/contact-us/virtual-agent/>

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

### Scenario:

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

### Scenario: Rx Refill

As a Veteran, you want to refill all your active prescriptions.

|  |  |  |
| --- | --- | --- |
| **Prototype** | | |
| **Testing Feature** | **Pertinent Notes – Utterances and Actions** | **Solution — desired user action** |
| **Screen/Step:** Opening Screen  **Interaction:**  Button options –  Health care options | [Ask]   * If you had multiple prescriptions, how would you expect the bot to present them?   *Note user utterance and actions.* | User types prescription refill |
|  |
|  |
| **Screen/Step:**  Rx refill  **Interaction:**  Button options –  Rx refill option | [O*bserve]*  *How does the user interact with the selections provided? Does the user seem satisfied with the available options?*  *Do they notice/comment on the microphone?*  [Ask]   * What do you think about the information the bot provided? * Did it match your expectations? * Anything else you notice here? * What do you think the microphone would do here? * What would you do here? * [If user indicates that something is missing] What, if anything, is missing from these options?   *Note user utterance and actions.* | User selects either  “Yes”, “No”, or “Menu |
| **Screen/Step:** Refill Rx – 2nd prescription  **Interaction:**  Button options –  Rx refill options | [Ask]   * What do you think might be provided in “More details”? * What do you think of this information? * Anything missing? * What do you think about the refill process?   *Note user utterance and actions.*   *[Explain] For the purposes of this session, I will have you just return to the main menu now.* | User selects Menu |
| **Screen/Step:** RX Main Menu  **Interaction:**  Button options –  List Prescriptions, Request Refills, Track Shipments, Done | [O*bserve]*  *How does the user interact with the selections provided?*  [Ask]   * With the interactions you’ve had with VA, would you expect this experience to be like? * What do you think “List Prescriptions” would do?   *Note user utterance and actions.* | User selects List Prescriptions |
| **Screen/Step:** List Prescriptions  **Interaction:**  Button options –  Next, Menu | [Ask]   * What do you think about the level of information the bot provided here? * Does this match what you expected? How so? * What do you think about the list process? * What would you do next?   *Note user utterance and actions.*  *Explain] For the purposes of this session, I will have you just return to the main menu now.* |  |

### Scenario: RX tracking

As a Veteran, you want to track your recently ordered prescription.

|  |  |  |
| --- | --- | --- |
| **Prototype** | | |
| **Testing Feature** | **Pertinent Notes – Utterances and Actions** | **Solution — desired user action** |
| **Screen/Step:** RX Main Menu  **Interaction:**  Button options –  List Prescriptions, Request Refills, Track Shipments, Done | [Ask]   * What would you do here? * What do you think “Tracking Prescriptions” would do/look like?   *Note user utterance and actions.* | User selects “Tracking Prescriptions” |
|  |
|  |
| **Screen/Step:**  Tracking Prescriptions  **Interaction:**  Button options –  Next, Menu | [Ask]   * What do you think about the level of information the bot provided here? * Does this match what you expected? How so? * What do you think about the tracking process? * What would you do next?   *Note user utterance and actions.* |  |
| **Screen/Step:**  Types of records  **Interaction:**  Button options –  Types of records | [Ask]  What would you do think about the options listed?  Do you expect to have access to any other type of records?  How do you expect the chatbot to deliver these records to you? | User selects “Allergy records” |
| **Screen/Step:**  Allergy records provided  **Interaction:**  Button options –  Download report; Transfer report | [Ask]  What do you think it means to transfer records?  Who do you expect to be able to transfer these records to?  What do you think you would typically do here?  [If P has non-VA providers ask following Qs about records transfers]  -What’s the ideal experience of transferring to a non-VA provider? | User selects “download reports” |
| **Screen/Step:**  Download complete  **Interaction:**  Button options –  Access another record Y/N | [Ask, if they want to select yes]  Why did you want to access other records?  What else would you want to do?   [Ask]  What did you think about that interaction?  Did it match your expectations? | 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:** RX Main Menu  **Interaction:**  Button options –  List Prescriptions, Request Refills, Track Shipments, Done | [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 “Done” or “Decision letters”. |
|  |
|  |

Follow-Up Questions 

1. How did you feel about these interactions?
2. Knowing prescription management can be completed through a VA chatbot, does it change how you might interact with VA?
3. Did you feel there were any tasks related to prescription management that you would want the chatbot to perform?
4. Did this prescription feature meet your expectations? Why or why not?
5. Overall, how did you feel about the voice interaction with the chatbot?
6. Was there anything that frustrated you?
7. Was there anything you were pleasantly surprised about?
8. 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. Enjoy the rest of your day! Goodbye.