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 accessibility around refilling, tracking, and listing prescriptions for visually impaired users.

User research will focus on testing the understanding and desired experience for visually impaired 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 navigate through the prescription refill process. Additionally, user research will help identify pain points or opportunities for improvement around the accessibility of this feature.

## Key Objectives

* Understand visually impaired user’s expectations and desires around the accessibility of the chatbot and the prescription voice feature
* Identify any pain points or shortcomings around accessibility of the voice feature for managing prescriptions in the chatbot.

### Questions by Topics

|  |  |
| --- | --- |
| High Priority | |
| ***Topic*** | ***Supporting Questions*** |
| Accessibility | 1. Do users think there is anything missing, difficult, or unexpected about the accessibility of the RX feature? 2. Do screen readers conflict with the voice feature? 3. Can screen reader and keyboard only users navigate through refill, list, and track successfully? |
| **Medium Priority** | |
| ***Topic*** | ***Supporting Question*** |
| 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 led navigation in the RX feature. |

### 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 **three** scenarios that will help inform accessibility and prescription management while identifying 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 and accessibility of the VA chatbot to get a better understanding of the upcoming prescription feature. Our goal is to gather feedback on this feature and check if this matches Veterans desires and expectations, especially around accessibility.

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. Let me know if you need help sharing your screen.

We will ask you to go through the chatbot that we will share in just a moment. It is important to remember that we are not testing you, we are testing the chatbot’s prescription feature. You cannot do anything wrong here.   
   
As you go through today’s session, please think aloud as much as possible. Describe 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 or anything that doesn’t match how you typically interact with a chatbot or webpage, thinking of accessibility. 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?**
* **Have you used or heard of the VA chatbot before?**
  + **[If so] What did you think?**
* **Do you have experience with non-VA chatbots?**
  + **[If so] What did you think? Were they accessible?**
* **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?**
* **How would you describe your familiarity with technology?**
* **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?)**
  + **Have you ever had any issues or difficulties with using assistive technology with VA?**

## 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: Rx Refill

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

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| --- | --- | --- |
| **Prototype** | | |
| **Testing Feature** | **Pertinent Notes – Utterances and Actions** | **Solution — desired user action** |
| **Screen/Step:** Opening Screen  **Interaction:**  Button options –  Start Chat | [Ask]   * If you had multiple prescriptions, how would you expect the bot to present them?   *Provide test user login credentials:*  va.chatbot.team+qa.3@gmail.com  DB9exVLC!nM-hTT  *Note user utterance and actions.* | User inputs prescription refill or similar |
|  |
|  |
| **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? * What do you think the microphone (speak) 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 this? * 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?   *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.* |  |

### Scenario: RX Exit

As a Veteran, you want 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 inputs “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 shortcomings related to accessibility of the chatbot? If so, what?
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!