Multi-channel Technologies (MCT) Virtual Agent Chatbot Research Participant Screener

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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 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 feature 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.

# Method

1. What method of research are you planning?
   * Remotely moderated interviews with Veterans where they are provided a link to a VA chatbot prototype by a facilitator who will guide them using specified scenarios. Veterans will also be provided a Mural link to conduct A/B testing to gauge their preference for exiting the prescription feature.
2. Why this method? How does this methodology help you answer your research questions?
   * This approach will allow us to understand the usability of a voice option within the prescription feature and gauge the users understanding of what can and can’t be done within this area of the chatbot. This method will also measure the desirability of certain key chatbot capabilities and architecture to inform feature design and development.

1. Where are you planning to do your research?
   * Remote virtual interviews and testing in Zoom.
2. Remote: What tool do you plan to use?

* Perigean: Zoom video conferencing, screen sharing,
* Shared Mural.co remote whiteboard.

## Research questions

What question(s) do you hope to be able to answer after completing this research?

User Testing Objectives

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

## Hypothesis

What is your hypothesis for this research?

* Veterans will find the voice function helpful for refilling their prescriptions via the chatbot. They will also understand that the prescription feature within the chatbot has a limited domain of knowledge and can only help with prescription-related tasks.

## Participant criteria

What are you looking for in a participant?

* 6 Veterans who are familiar with VA.gov and the prescription refill process.

## Screening Questions

* Can they access a laptop or desktop computer with a reliable internet connection?
  + If no, then do not recruit.
  + If yes, then continue.
* During the session, they must be willing to share a web browser window on their device.
* Have Zoom downloaded to their device before the session and know how to share a screen.
* Language: Participant must be fluent in English so the researchers can communicate with them.

## Demographics

* Rationale:
  + Over-sample largest minority groups based on the national Veteran population model:   
    <https://www.va.gov/vetdata/docs/Demographics/New_Vetpop_Model/Vetpop_Infographic_Final31.pdf> and <https://www.va.gov/VETDATA/docs/SurveysAndStudies/VETPOP.pdf>
* Gender:
* 3 or more women
* 3 or more men
  + Age:
    - 1 or more 25-34 (W)
    - 1 or more 35-44 (X1)
    - 2 or more 45-54 (X2)
    - 2 or more 55-64 (Y1)
* Please track population density and geographical area type for each participant. E.g., Rural, urban.
* Please track the number of years the users or their family members have been using their VA benefits/services.

## Recruitment Strategy

Please recruit via the existing recruiting contract.

# Testing Details & Timeline ￼

## Notional Timeline

|  |  |
| --- | --- |
| Design Plan Submission | May 24, 2023 |
| Facilitation Guide Completed | May 24, 2023 |
| Test Sessions Begin | June 1, 2023 |
| Test Sessions Completed | June 6, 2023 |
| Testing Results Evaluation Completed | June 12, 2023 |
| Research Findings Presentation | June 12, 2023 |

## Testing Timeline

1. Timeline: What dates do you plan to do research?
   * June 1 – June 6, 2023

1. Length of Sessions: How long do you estimate each session will be?
   * Up to 60 minutes
2. Availability: If applicable, when would you like sessions scheduled?
   1. Our goal is to speak to 6 Veterans
   2. Please allow at least 30 minutes between each 60-minute session
   3. Thursday, June 1 – Tuesday, June 6, 2023, ET at the following times:
   * 10:30 – 11:30 am
   * 12:00 – 1:00 pm
   * 1:30 – 2:30 pm
   * 3:00 – 4:00 pm
   * 4:30 – 5:30 pm
3. Pilot:
   1. Wednesday, May 31, 2023 (preferably between 1pm and 5pm ET)
   2. We would like to include the following participants in the pilot session:
      1. Matthew Terwilliger ([Matthew.Terwilliger@VA.gov](mailto:Matthew.Terwilliger@VA.gov))
4. Additional recruiting requests:
   1. Confirm in advance that each participant has access to (and will use during the session) a reliable computer or laptop with connection to the internet.
   2. To reduce the no-show rate, please do the following:
      1. Confirm each interview with the participant in advance.
      2. Text or email a reminder to each participant the morning of their interview.
      3. Call the participant to confirm if you do not hear back.
      4. Ensure in advance that participant has screen-sharing permissions enabled for their Zoom application

## Team Roles

* Moderators:
  + Matthew Terwilliger
    - 802-750-1490
    - [Matthew.Terwilliger@VA.gov](mailto:Matthew.Terwilliger@VA.gov)
* Research guide writing and task development (usually but not always same as moderator):
  + Matthew Terwilliger
* Participant recruiting & screening:
  + Perigean
* Project point of contact:
  + Luciana Morais and Kevin Clawson (VA Project Managers); Matthew Terwilliger
* Participant(s) for pilot test:
  + Matthew Terwilliger, [Matthew.Terwilliger@VA.gov](mailto:Matthew.Terwilliger@VA.gov)
* Observers:
  + Luciana Morais: [Luciana.Morais@VA.gov](mailto:Luciana.Morais@va.gov)
  + Shane Strassberg: [Shane.Strassberg@VA.gov](mailto:Shane.Strassberg@va.gov)
  + Kevin Clawson: [Kevin.Clawson@VA.gov](mailto:Kevin.Clawson@va.gov)
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  + Dale Larue: [Dale.Larue1@va.gov](mailto:Dale.Larue1@va.gov)
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  + Helene McCarron: [Helene.McCarron@VA.gov](mailto:Helene.McCarron@VA.GOV)

**Several team members are contractors with Booz Allen. Please ONLY use VA.gov email addresses to protect Veteran PII. Thank you!**