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

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

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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.

# Method

1. What method of research are you planning?
   * Remotely moderated interviews with Veterans where they are provided a link to the VA chatbot in the development environment by a facilitator who will guide them using specified scenarios.
2. Why this method? How does this methodology help you answer your research questions?
   * This approach will allow us to measure the desirability of certain key chatbot capabilities and architecture to further inform the prescription features 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,

## 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 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.

## Hypothesis

What is your hypothesis for this research?

* Veterans desire a streamlined experience for managing their prescriptions that carries across VA platforms. A guided Chatbot experience for managing prescriptions from an instant, conversational tool should meet that need.

## Participant criteria

What are you looking for in a participant?

* 9 Veterans who are currently enrolled in VHA services, preferably those who have refilled their prescriptions recently.

## Screening Questions

* Have they refilled a prescription through the VA in the last 60 days?
  + If no, then do not recruit.
  + If yes, then continue.
* 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

* Race/Ethnicity:
* 3 non-white or Caucasian participants
* 6 various
* Gender:
* 4 or more women
* 4 or more men
  + Age:
    - 1 or more 18-24 (U)
    - 1 or more 25-34 (W)
    - 1 or more 35-44 (X1)
    - 3 or more 45-54 (X2)
    - 3 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 | August 23, 2023 |
| Facilitation Guide Completed | August 23, 2023 |
| Test Sessions Begin | August 30, 2023 |
| Test Sessions Completed | September 5, 2023 |
| Testing Results Evaluation Completed | September 8, 2023 |
| Research Findings Presentation | September 12, 2023 |

## Testing Timeline

1. Timeline: What dates do you plan to do research?
   * August 30 – September 5, 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 9 Veterans
   2. Please allow at least 30 minutes between each 60-minute session
   3. Wednesday, August 30 – Tuesday, September 5, 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. Tuesday, August 29, 2023 (preferably between 10am and 2pm 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))
      2. Tony Lee ([Tony.Lee390@VA.gov](http://Tony.Lee390@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, Nathalie Rayter, 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)
  + Nathalie Rayter: [Nathalie.Rayter@VA.gov](mailto:nathalie.rayter@va.gov)
  + Robyn Singleton: [Robyn.Singleton@VA.gov](mailto:robyn.singleton@va.gov)
  + Shannon Ford: [Shannon.Ford1@VA.gov](mailto:shannon.ford1@va.gov)
  + Kevin Clawson: [Kevin.Clawson@VA.gov](mailto:Kevin.Clawson@va.gov)
  + Hugo Padilla: [Hugo.Padilla@VA.gov](mailto:Hugo.Padilla@va.gov)
  + (Additional government observers will be present during all sessions, but our team will coordinate invitations to those observers)

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