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

Date updated: September 28, 2023

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

[Multi-channel Technologies (MCT) Virtual Agent Chatbot Research Participant Screener 1](#_Toc121826441)

[Overview 1](#_Toc121826442)

[Background 1](#_Toc121826443)

[Method 1](#_Toc121826444)

[Research questions 2](#_Toc121826445)

[Hypothesis 2](#_Toc121826446)

[Participant criteria 2](#_Toc121826447)

[Screening Questions 2](#_Toc121826448)

[Demographics 2](#_Toc121826449)

[Recruitment Strategy 3](#_Toc121826450)

[Testing Details & Timeline 3](#_Toc121826451)

[Notional Timeline 3](#_Toc121826452)

[Testing Timeline 3](#_Toc121826453)

[Team Roles 4](#_Toc121826454)

# 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.

# 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 and accessibility of certain key chatbot capabilities 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?

* 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 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.

## Hypothesis

What is your hypothesis for this research?

* Visually impaired Veterans desire a streamlined and accessible experience for managing their prescriptions that carries across VA platforms. A voice led Chatbot experience for managing prescriptions from an instant, conversational tool should meet that need.

## Participant criteria

What are you looking for in a participant?

* 4 Veterans who identify as visually impaired and use assistive technology such as a screen reader and/or keyboard navigation.
* 4 Veterans who are currently enrolled in VHA services, preferably those who have refilled their prescriptions recently.

## Screening Questions

* Do they identify as visually impaired and use assistive technology such as a screen reader or keyboard navigation?
  + If no, then do not recruit.
  + If yes, then continue.
* 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:
* 1 non-white or Caucasian participants
* 3 various
* Gender:
* 2 or more women
* 2 or more men
  + Age:
    - 1 or more 18-34 (U)
    - 1 or more 35-44 (X1)
    - 2 or more 45-64 (X2)
* 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 | September 25, 2023 |
| Facilitation Guide Completed | September 25, 2023 |
| Test Sessions Begin | October 4, 2023 |
| Test Sessions Completed | October 6, 2023 |
| Testing Results Evaluation Completed | October 11, 2023 |
| Research Findings Presentation | October 13, 2023 |

## Testing Timeline

1. Timeline: What dates do you plan to do research?
   * October 4 – October 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 4 Veterans
   2. Please allow at least 30 minutes between each 60-minute session
   3. Wednesday, October 4 – Friday, October 7, 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, October 3, 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))
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:
  + Iron Bow
* Project point of contact:
  + Nathalie Rayter, 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:
  + Nathalie Rayter: [Nathalie.Rayter@VA.gov](mailto:nathalie.rayter@va.gov)
  + Luciana Morais: [Luciana.Morais@VA.gov](mailto:Luciana.Morais@va.gov)
  + Ryan Powers: [Ryan.Powers3@VA.gov](mailto:Ryan.Powers3@VA.gov)
  + Joy Elizabeth: [Joy.Elizabeth@VA.gov](mailto:Joy.Elizabeth@VA.gov)
  + Dale LaRue: [Dale.Larue1@VA.gov](mailto:Dale.Larue1@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!**