Multi-channel Technologies (MCT)

Virtual Agent Chatbot Research Facilitation Guide

Date updated: December 28, 2022

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

[Overview 1](#_Toc1157503137)

[Team 1](#_Toc2008048945)

[Background 1](#_Toc1585328570)

[Key Objectives 2](#_Toc1872775029)

[Questions by Topics 2](#_Toc1960649373)

[One-on-One Interviews 2](#_Toc1982575942)

[Staging environment for VA chatbot 3](#_Toc1878093229)

[Agenda 4](#_Toc1134594316)

[Virtual Agent Chatbot Interview 4](#_Toc102261469)

[Background Questions 4](#_Toc160172651)

[Chatbot Testing 4](#_Toc1746692301)

[Scenario: Account types 5](#_Toc1010651226)

[Scenario: Login.gov 6](#_Toc1382887686)

[Scenario: ID.me 9](#_Toc1614582530)

[Closeout 10](#_Toc1096477805)

# Overview

Team  
Department of Veteran Affairs (VA) VEO Multi-Channel Technologies (MCT) – Virtual Agent Chatbot Research

## 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 getting login assistance for Login.gov and ID.me.

This project will focus on the desired experience for Veterans seeking login assistance for their new or existing Login.gov and ID.me accounts from the VA chatbot. User research will focus on testing the desirability and perceived usefulness of information and interactions, which will inform future product roadmaps and possibly content creation. Additional research will be conducted to garner what Veterans might expect the VA chatbot to be able to assist them with regarding MyHealtheVet and DS Logon related requests.

## Key Objectives

Understand user expectations and desires around the information and interactions the VA chatbot can provide regarding login assistance for their new or existing Login.gov and ID.me accounts.

### Questions by Topics

|  |  |
| --- | --- |
| High Priority | |
| ***Topic*** | ***Supporting Questions*** |
| Login.gov | 1. What utterance or keywords would a user expect to type in for help with a Login.gov account? 2. Are the help tasks what the user expects for an existing Login.gov account? 3. What additional tasks associated with Login.gov account assistance should the chatbot be able to perform, if any? 4. How do users feel about the button layout and navigation between button stacks? |
| ID.me | 1. What utterance or keywords would a user expect to type in for help with an ID.me account? 2. Are these help tasks what the user expects for creating an ID.me account? 3. What additional tasks associated with ID.me account assistance should the chatbot be able to perform, if any? 4. How do users feel about the button layout and navigation between button stacks? |
| **Low Priority** | |
| ***Topic*** | ***Supporting Question*** |
| MyHealtheVet and DS Logon | 1. What kind of account tasks do users expect to be aided with for these two providers?    1. Do users primarily use either of these for log-in? |

### One-on-One Interviews

In the first 10 minutes of the session, the team will ask a series of questions to understand what information Veterans expect and desire from 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

### Staging environment for VA chatbot

Following the interview portion, the team will present the participant with the VA chatbot within the staging environment to test. The moderator will guide users through two scenarios that will help inform the ways in which VA chatbot users can seek out login assistance as it applies to a new or existing Login.gov and ID.me account.

Benefits

* The staging environment is 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

* Need to ensure with developers that the staging environment is set up and stable for testing.

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 about topics related to your account and login assistance. Our goal is to gather feedback on the current version of chatbot at VA and understand how it might help Veterans in carrying out their tasks.

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 one hour. In a moment I am going to ask you to share your screen while we are testing the product 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 chatbot that we will share in just a moment. It is important to remember that we are not testing you, we are testing this 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 familiar are you with VA.gov? If so, how often do you visit the site?**
* **Do you have an account with VA to log-in with? If so, which do you typically use to log-in with (Login.gov, ID.me, MHV, DS Logon)?**
* **What types of devices do you use to access VA.gov? (Screen Reader?)**
* **Have you ever had log-in issues with an account? How did you solve it?**
* **Are you familiar with the chatbot on VA.gov?**
* **Do you have experience interacting with other non-VA chatbots?**
* **How would you describe your familiarity with technology?**

## Chatbot Testing

Thank you for your answers so far. Now we can move on to the testing activity. To get started, please open your web browser and share your screen. Then I will send over the link to the chatbot.

***Instructions for Facilitator.***

1. Send over chatbot staging Link:

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

Any questions, comments, or concerns so far? Great! Let us begin…

### Scenario: Account types

As a Veteran, you’re looking for information to learn about the different account types available on VA.gov.

|  |  |  |
| --- | --- | --- |
| **Chatbot Staging Environment** | | |
| **Testing Feature** | **Pertinent Notes – Utterances and Actions** | **Solution — desired user action** |
| **Screen/Step:**  Opening Screen  **Interaction:**  Type message | [Ask]  What do you think about the information and topics the bot provided?  What keywords do you think you would type to learn about the different account types?  What would you do here?  *Note user utterance and actions.* | User types in “Account types” or “my account” |
|  |
|  |
| **Screen/Step:**  Account picker  **Interaction:**  Button options –  Login.gov;  ID.me;  I don’t know | [Ask]  What do you think of the response and options listed?  Do you typically log-in with one of these providers?  What do you think “I don’t know” might do here?  *Note user utterance and actions.* | User selects either  “I don’t know” |
| **Screen/Step:** I don’t know  **Interaction:**  Button options –  Access another record Y/N | Ask]  How do you feel about a chatbot providing this information?  [Have user navigate to link] - What do you think of this information if you didn’t know about signing into the VA?  [Redirect user back to Login.gov flow]  *Note user utterance and actions.* |  |

### Scenario: Login.gov

As a Veteran, you’re looking for more information on how to change your e-mail for your existing Login.gov account.

|  |  |  |
| --- | --- | --- |
| **Chatbot Staging Environment** | | |
| **Testing Feature** | **Pertinent Notes – Utterances and Actions** | **Solution — desired user action** |
| **Screen/Step:** Opening Screen  **Interaction:**  Type message | [Ask]  What keywords would you use to search for sign-in assistance?  What would you do here?  *Note user utterance and actions.* | User types in “login.gov” or “my account” |
|  |
|  |
| **Screen/Step:** Account picker  **Interaction:**  Button options –  Login.gov;  ID.me;  I don’t know | O*bserve]*  *How does the user interact with the selections provided? Does the user seem satisfied with the available options?*  *Note user utterance and actions.* | User selects either  [“Login.gov”](#Login)  [“ID.me”](#ID) or  [“I don’t know”](#Know) |
| **Screen/Step:** Login.gov  **Interaction:**  Button options –  Help with my account;  Create a new account;  back | [Ask]  What do you think of the response and options listed? Do these options make sense?  Did this match your  expectations?    *Note user utterance and actions.* | User selects “Help with my account” |
| **Screen/Step:** Help with my account  **Interaction:**  Button options –  Forgot my password;  Sending my ID;  Changing my phone number; see more options; back | [O*bserve]*  *How does the user interact with the selections provided? Does the user seem satisfied with the available options?*  [Ask]  What do you think of these options?  With the interactions you’ve had with VA, would you expect this experience to be like this?  *Note user utterance and actions.* | User selects “See more options” |
| **Screen/Step:** See more options  **Interaction:**  Button options –  Changing my email;  Help with security options;  Login.gov help center;  None of these;  back | [Ask]  What do you think about the navigation with the see more options and back buttons?  What do you think about the level of information the bot provided here?  What do you think Login.gov help center might do or be for?  [If user indicates that something is missing]  Is there any information missing?  What would you do next?  How would you expect that interaction to go?  *Note user utterance and actions.* | User selects “Changing my email” |
| **Screen/Step:** Changing my email  **Interaction:**  Button options –  Yes;  No | [Ask]  What do you think about the level of information the bot provided here?  Did this match your  expectations?  What would you do next?  *Note user utterance and actions.* | User selects “Go to the Change the email address…” link |
| **Screen/Step:** Login.gov email help page  **Interaction:**  N/A | [Ask]  What do you think about the level of information provided?  Did this meet your expectations, why or why not?  What do you think about this solution?  *Note user utterance and actions.* |  |
| **Screen/Step:** ID.me  **Interaction:**  Button options –  Help with my account;  Create a new account;  back | [Ask]  Why did you make this selection?  [Redirect user back to Login.gov flow]  *Note user utterance and actions.* | User selects [“back”](#Login) |
| **Screen/Step:** I don’t know  **Interaction:**  Button options –  Access another record Y/N | [Ask]  Why did you make this selection? (If user clicks on the button on their own).  How do you feel about a chatbot providing this information?  [Have user navigate to link] - What do you think of this information if you didn’t know about signing into the VA?  [Redirect user back to Login.gov flow]  *Note user utterance and actions.* | User selects [“back”](#Login) |

### Scenario: ID.me

As a Veteran, you want to get more information on creating a new ID.me account.

|  |  |  |
| --- | --- | --- |
| **Chatbot Staging Environment** | | |
| **Testing Feature** | **Pertinent Notes – Utterances and Actions** | **Solution — desired user action** |
| **Screen/Step:** Opening Screen  **Interaction:**  Help with my account;  Create a new account;  Back;  Type message | [Ask]  What do you think about the information and topics the bot provided?  What would you do here?  *Note user utterance and actions.* | User selects “Create a new account” |
|  |
|  |
| **Screen/Step:**  Create a new account  **Interaction:**  Button options – What you’ll need;  Am I eligible?;  Verify Identity;  See more options;  Back | [O*bserve]*  *How does the user interact with the selections provided? Does the user seem satisfied with the available options?*  [Ask]  What do you think about the options listed?  What would you do here?  *Note user utterance and actions.* | User selects “What you’ll need” |
| **Screen/Step:**  What you’ll need  **Interaction:**  Button options –  Y/N; back | [Ask]  What do you think about the level of information the bot provided here?  How do you feel about a chatbot providing this kind of information?  Did this match your  expectations?  What would you do next? | User selects “Create your ID.me account” |
| **Screen/Step:**  Creating your ID.me Account  **Interaction:**  N/A | [Ask]  What do you think about the level of information provided?  How do you feel about having to leave the VA.gov website to create your account?  Did this meet your expectations, why or why not?  What do you think about this solution?  *Note user utterance and actions.* |  |

Follow-Up Questions 

1. What help options might you expect to see for a MyHealtheVet account? DS Logon?
2. How did you feel about these interactions?
3. Knowing this help can be provided through the VA chatbot, does it change how you might interact with VA.gov?
4. If not already familiar with VA chatbot, did this experience meet your expectations? Why or why not?
5. Was there anything that frustrated you?
6. Was there anything you were pleasantly surprised about?
7. Did you feel anything was lacking from the experience? Compared with other non-VA chatbots?

## 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!