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 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.

# Method

1. What method of research are you planning?
   * Remotely moderated interviews with Veterans where they have a link to the staging environment for the VA chatbot and a facilitator that will guide them through specified scenarios.
2. Why this method? How does this methodology help you answer your research questions?
   * This approach will allow us to understand 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 information and interactions the VA chatbot can provide regarding login assistance for their new or existing Login.gov and ID.me accounts.

## Hypothesis

What is your hypothesis for this research?

* Veterans appreciate the streamlined experience that the chatbot provides for receiving account login assistance and they find the options relevant to their needs.

## Participant criteria

What are you looking for in a participant? ￼

* 14 Veterans who are familiar with VA.gov. Additionally, at least 5 of the Veterans should have login credentials with Login.gov and/or ID.me to be familiar with the processes and topics.

## Screening Questions

* Can you access a laptop or desktop computer with a reliable internet connection?
  + If no, then do not recruit.
  + If yes, then continue.
* During the session, be willing to share a web browser window on their device.
* Have Zoom downloaded to their device prior to the session and know how to share their screen.
* Language: Participant must be fluent in spoken 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:
* 6 or more women
* 6 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 | December 13, 2022 |
| Facilitation Guide Completed | December 13, 2022 |
| Test Sessions Begin | January 3, 2023 |
| Test Sessions Completed | January 10, 2023 |
| Testing Results Evaluation Completed | January 13, 2023 |
| Research Findings Presentation | January 17, 2023 |

## Testing Timeline

1. Timeline: What dates do you plan to do research?
   * January 3 – January 10, 2023

1. Length of Sessions: How long do you estimate each session will be?
   * Up to 1 hour
2. Availability: If applicable, when would you like sessions scheduled? ￼
   1. Our goal is to speak to a minimum of 14 Veterans
   2. Please allow at least 30 minutes between each 60-minute session
   3. Monday, January 3 – Tuesday, January 10, 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
   * 6:30 – 7:30 pm
3. Pilot:
   1. Friday, December 30th (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
    - 845-309-2905
    - [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)
  + Ian Santarinala: [Ian.Santarinala@VA.gov](mailto:Ian.Santarinala@va.gov)
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  + Joe Hall: [Joseph.Hall4@VA.gov](mailto:Joseph.Hall4@va.gov)
  + Justin Trieu: [Justin.Trieu@VA.gov](mailto:Justin.Trieu@va.gov)
  + 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!**