# Conversation Guide

*Start recording.*

* I have started recording. I'd like to confirm: Are you comfortable if I record my screen and the audio as we talk today? Yes you do.

## Warm-up Questions (Optional) - 5 minutes

* What is your experience with VA.gov? Um I think it was ebenefits. Yes. The va.gov is a way to get to other sites like my HealtheVet and benefits. I think my HealtheVet was the most recent
* Have you ever needed information about claims? Yes.
* What information about claims do you look for? The most recent time, that was looking at a claim that I had placed looking at the results of that.
* How do/ [would] you usually find information about your particular claims? It was tricky for me. The infomration I think it was one of the button a the topish middleish of the va.gov site and used that to get to ebenefits then from there was able to open the claims history and from there I opened the most recent one.

## First Task: [Finding the chatbot] - 5 minutes

1. Can you describe what contact options there on this page? I see contact us through ask va, call us, main info line, tty version, va benefit hotline, Gi bill and benefits hotline, the help desk and local facilities and FAQ.
2. Anything above these options: now I see it the va virtual agent.
3. Go to headings first: yes towards the contact us online piece.
4. What does the option in the grey box represent… where would that take you? I would expect it to open the little box at the bottom for chatting with a bot.
5. What is your experience with chatbots been like? Yes, used in the past. Helpful. Depending on the company, Verizon has been a pain in the ass. Banfield is who I get pet care through and theirs is awesome.
6. Based on your experience,
   1. Where would you expect to find the access point to a chatbot on a web page? On some of them are at the bottom right with a small window within the window that lets us talk online with the bot or connect with live agent. Often it shows up on all of the pages no matter which you are on.
   2. Where would you expect the chat window to live on your screen once you’ve opened it? It typically stays at the bottom right side with an option to pop out into its own window.

Let’s go ahead and click on the shaded box option

1. Have you seen/used the chatbot of VA.gov? No I have not.

## Second Task: [How to sign in/Sign out] - 5 minutes

1. Where did we end up? A page for va virtual agent and it is in beta testing.
2. Did that last click take you where you expected to go? This feels logical, it feels like a good place to go.

We’re going to take a pause now- just for your awareness, you’re now going to assume the dummy personality of Hector. Hector has a few claims with VA and is looking to find out more about them. As a warning, the typing function is turned off, so we’re going to speak through the steps and I’ll instruct you on when and where to click.

1. Let’s say you wanted to use the chatbot to find information about your latest claim. If you were going to type something into that chat, what would you input into the chat window to get that information? Is this piece a screen shot of what it would look like or is there where someone would type in the box. These are the ones that would come up perfect. If I were hector I would type in where can I find benefits infomraiton.
2. OK and what kind of reply would you expect? A list of websites, maybe a descriptions of the infomration and that says the benefits page.
3. OK Let’s go ahead and click 'type your message' down at the bottom and see what Hector says.

\*Reply appears\*

Alright… let’s talk about what happened there

1. Can you describe what the chatbot responded? To sign in to view the claim status with id.me account or you can see it at the hyperlink check your claim/appeal status page.
2. What other options has it presented you with? Sign in or ask something else
3. What would you do next? Would you sign in? I would sign in if hector has an account. To view the claim status here.

Let’s say, for a moment, if you didn't want to sign in. You’re in a rush perhaps.

1. How would you proceed to continue with your claims search? If hector wanted to know about the claim status I would go to the hyperlink to check the claim. It is more general information I would ask something else.

Let say you /did/ want to sign in and continue.

1. How would you do it? Sign in click button.

OK! Before continuing to sign let’s talk about:

1. What you expect as the chatbot’s next step to you [performing sign in step]? I would expect it to open a next page to take me to the sign in.

Go ahead and click the Sign in button.

\*User clicks Sign in, takes to VA.gov Login page, if necessary guide to walkthrough.

1. Great! Now tell me where that click took us? It looks like it is an overlay of the previous site and it has a number of ways to sign in or to create an account if you don’t have one. It looks like there are answers about signing in and verifying the identity below.
2. What feels like the next step to continue signing in? I think id.me is what it said.

Alright go ahead and click that ID.me second option down.

## Third Task: [Receiving the answer] - X minutes

\*Replies appear\*

OK great!

1. Can you describe what happened after you clicked that ID.me button? Welcome hector there is information about the claims, representative same, remember to sign out before you leave. What to do next, speak with agent, check appeals ask new question.
2. What did the Chatbot reply… can you read aloud anything that stands out?

Now that we’ve read the message, I want you to scroll up on the browser and then pan back down to scan the page and take it all in.

1. Do you notice if anything has changed about the chat or browser window between the last screen and this screen? Its like one of the I spy games. I see hector at the top. It looks like hector is signed in.

Anything else or just hector: the options are different; we are able to speak with an agent when we weren’t before.

I imagine you’ve signed into accounts online before. What’s the last sign in experience you had?

1. Is it important to you to know you’re signed in? Yes, I want the information about my stuff and sometimes I have an easier time accessing it if I am logged in. otherwise I jump around more when not logged in.
   * Why’s that?
2. [If they know they’re signed in] What are some details that signify that you’re signed in? The name up at the top and you can see hectors information.
3. Without clicking anything, what would you do next? To learn more about the claim I would click myVA.

## Fourth Task: [Reading the sign out reminder] - 5 minutes

OK great- Let’s say you chatted with the bot and got all you needed.

1. How would you sign out? I would click the sign out button on the drop down here.
2. Are there any other ways would you expect to sign out: No. I don’t think so. As long as that tab was on each of the pages.
3. What if it wasn’t, next step: I would see if it was on the very bottom of the screen. If I didn’t see it I would likely give up and just exit out of the window.

## Fifth Task: [Sign out] - 5 minutes

\*Ask to click on the Sign out Hector space”

1. OK – can you describe what’s happened? It looks like the homepage. There’s updates about va facilities and COVID infomraiton. You can access the benefits and healthcare form four different square things.

Let’s say Hector wasn’t quite finished chatting.

Without clicking anything yet,

1. What would you -as hector- do next to get back to the bot? I would go to contact us to see if I could access it from there again.

Let’s say you knew right were to click to get back to it.

1. What would you expect the chatbot screen to look like? Like the first one we were looking at with the list of options with chat box at the top, numbers and tty.

Alright. We’re going to cheat a little- could you please click on the VA logo on the upper left of the screen

\*Navigate back to the start via the VA.gov header logo.

1. What would you expect the chatbot to say when re-accessing it? I would hope that it still had, if still signed in, the rest of the information from the conversation before.
2. Let’s say you had to sign in again to keep going like we had to last time, how would it make you feel? yes
3. OK Now let’s say you signed in again and the chatbot hadn’t retained the chat history, how would you feel about that? I would be bummed.

## Post-Task Interview - X minutes

OK that’s it for the prototype. Next up, I’m going to ask you a series of questions to gauge your experience today. <https://forms.gle/jK1dfYtxECgeb5Zu5>]

1. I think that I would like to use this system frequently: 3
2. I found the system unnecessarily complex: 2
3. I thought the system was easy to use: 4
4. I think that I would need the support of a technical person to be able to use this system: 1
5. I found the various functions in this system were well integrated:3
6. I thought there was too much inconsistency in this system: 1
7. I would imagine that most people would learn to use this system very quickly: 2
8. I found the system very cumbersome to use: 1
9. I felt very confident using the system: 4
10. I needed to learn a lot of things before I could get going with this system: 1

**Now for these you’ll just answer in your own words**

1. How do you feel about the voice and tone of the responses you received? Yes. I thought it was pleasant.
2. Overly so: No it felt appropriate. It wasn’t overridden with excitement but it was clear and concise and friendly.
3. Was it clear what all the buttons did (button labels) or where all the links went? I would not have known clicking the logo would take me back to the chatbot page.
4. Would you rephrase any of the buttons?
5. Based on your experience today, are you willing to use the chatbot again? If I needed it yes.
6. What do you mean: I am trying to think of questions that I would want to ask it. The VA.gov sites like myhealthevet sites I am comfortable using but if there were a question about benefits I would sue it.
7. What additional feature to the chatbot would improve your experience? I would be nice if you could navigate away form the page but still have access to the bot if you are going to the claim page. IF it would stay in the window or whatever it is called and to see the history.
8. Do you have any other feedback you'd like to share? I think that it very disability friendly if you have a color blindness or have difficulties seeing and using a screen reader looks like it would be useable for those systems. As far as advice I don’t have anything thought.
9. Any questions for me? No, I do not.

## Thank-You and Closing - X minutes

Well we really appreciate you taking the time to share your thoughts with us today. Your feedback is so helpful to us as we continue to work on the site and make sure it really works for Veterans.

Thanks! Lastly, do you know any other Veterans, caregivers, or service members who might be willing to participate in a future user research session? If Yes: Thank you! I'll have our team send you an email with a little blurb that you can pass along.

Great, well thank you so much again, and enjoy the rest of your day!