# 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.

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

* What is your experience with VA.gov? It has been pretty good. I have been able to use the site to search the site to find answers to questions or find resources I need.
* Have you ever needed information about claims? I haven’t used the site for claims. If I have questions about claims I call someone. I would use the site to make the phone call.
* Say you were going to call; would you do any research before calling? It depends on what kind of claim.
* What information about claims do you look for?
* How do/ [would] you usually find information about your particular claims?

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

* Open this website: <https://pilarmoreno461371.invisionapp.com/console/share/RD3N78UBYGK/893720979>

1. Can you describe what contact options there on this page? Looks like there are a few ways contact us online, contact your local VA facility, Virtual Agent even though that is not listed at the top. There are drop down areas.
2. What does the option in the grey box represent… where would that take you? I think it would pop up in the lower corner on this page with a chat.
3. What is your experience with chatbots been like? Yes, I have. I think I would use because they have been pretty helpful. It is standardized text. It directs you in the direction you may need to get to where you need to go.
4. Based on your experience,
   1. Where would you expect to find the access point to a chatbot on a web page? Usually on the help page or contact page is where I go to get that kind of help because I am looking for a resource.
   2. Where would you expect the chat window to live on your screen once you’ve opened it? In that lower right corner. It is usually a pop up.

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

1. Have you seen/used the chatbot of VA.gov? I have. I think I actually have done another one of did things that had me click through. Not chatting with this.
2. What this research session or on your own? A research session.
   1. What is your experience been like with it?

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

1. Where did we end up? So, this looks like it opened a new page. One this page it doesn’t show how I got to this page, but it opened another page. I was expecting this pop up, but I was not expecting it on a new page.
2. Did that last click take you where you expected 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? Probably just like 5 or less words that I was trying to search for. I see some words that some may be searching for. Just a few words of what I am looking for.
2. OK and what kind of reply would you expect? A link that takes me to a page on VA.gov where I would be able to find my information. If I typed in dental, it may ask me more information to narrow down my search. Or even information to contact someone who can further help me.
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? I asked about a claim, and it told me to sign in, and it provided a link to check my VA claim.
   * [if incomplete response] What other options has it presented you with?
2. What would you do next? Would you sign in? I would probably click on the first blue bubble to sign in, since it told me to sign in to view my claim.
   * Why? /Why not?

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? It also says I can see it if I want to view my VA claim so I would probably click that.

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

1. How would you do it? I would click that blue button that states sign in.

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]?

Go ahead and click the Sign in button. I am trying to think. It doesn’t make sense for me to sign in through the chat, so it would probably redirect me to another page to sign in.

\*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 opened a new window, I have 4 options to sign in with for ways to login.
2. What feels like the next step to continue signing in? My login is usually the DS Logon so that is what I would click on.

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? I clicked it and it took me back to the virtual agent page.
2. What did the Chatbot reply… can you read aloud anything that stands out? It says I have one compensation Claim, give me a representative.

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? So, in the upper right corner it has my name as Hector with a drop in with probably some options in there.

I imagine you’ve signed into accounts online before. What’s the last sign in experience you had? It didn’t pop up with a username and password when I clicked on this one, which is weird. Usually when I signed in it takes me to a page that I was not on, but this one took me back to the virtual agent.

1. What are some things you noticed that time that indicated you were signed in? Not off hand to me besides it says my name on top with person next to me.
2. Is it important to you to know you’re signed in? Yes, because it tells me that I have new functions. I am getting more personalized information to my account.
   * Why’s that?
3. [If they know they’re signed in] What are some details that signify that you’re signed in?
4. Do you notice anything different about the website or the chat window? What does the lock icon mean? Usually security. I didn’t notice if it was there unlocked or not. Maybe it is there now because it has information only on my account. I didn’t notice it until you pointed it out.
5. Without clicking anything, what would you do next? Can you refresh me what was typed in initially to get here? Yes, Hector typed in what is my claim status. I would probably click on speak to an agent because it just gave me generic information. I do not know how much time has passed. I would just want to talk to someone to get the information.

## 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 will tell you what I notice, it tells me to not forget to sign out, but it does not provide a place to sign out of chat so I would go to my name and click sign out there. My initial thing would be to just close the chat, but there is no way to close out so I would go to sign out of my account.
   * *If applicable-in chat sign out-* If you can't sign out from the chatbot, how would you sign out?
2. Are there any other ways would you expect to sign out? If you gave me a blue bubble to sign in I would expect another blue bubble to sign out, or if you are done with the chat click here. May even have a close x on the corner.
   * Why?

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

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

1. OK – can you describe what’s happened? It drops down and allows me to sign out. It took me back to the home page and told me that I was successfully signed out.

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 probably click on the contact us next to the sign in.

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? It would look like the contact page but the chatbot would not automatically pop up again because I am signed out.

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?
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? It wouldn’t bother me because I had just signed out. It wouldn’t be a big deal to me. I think for security reasons it would make me feel better.
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? No. I would feel okay. I guess to me it would be alarming how much information is retained on the internet. If someone was able to log onto my account and have all my information would not feel right.

## 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: 4
2. I found the system unnecessarily complex: 2
3. I thought the system was easy to use: 5
4. I think that I would need the support of a technical person to be able to use this system: 2
5. I found the various functions in this system were well integrated: 4
6. I thought there was too much inconsistency in this system: 2
7. I would imagine that most people would learn to use this system very quickly: 4
8. I found the system very cumbersome to use: 1
9. I felt very confident using the system: 5
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? I thought that it, I guess it was a neutral tone. I think it even said Welcome Hector. It was a neutral tone. It was informative. Not over-friendly, provided information, and to the point.
2. Was it clear what all the buttons did (button labels) or where all the links went? Would you rephrase any of the buttons? So, I remember the first thing it said sign in through ID.me and then there was a blue button to sign in. I think they both need to be hyperlink, or both be blue buttons.
3. Do you think they were clashing for your attention? Yes, it just didn’t make sense for them to be two different things. Either all hyperlinks or buttons.
4. Based on your experience today, are you willing to use the chatbot again? Yeah, I think it was helpful. I think it was nice once I signed in it took me back to where I was. Maybe there should be a way to tell me to sign in before chatting.
5. What additional feature to the chatbot would improve your experience? I can’t think of anything off hand. Instead of it being a new page it could be that pop up would be more helpful. When it opens a new page, and I can’t navigate through the rest of the page.
6. Do you have any other feedback you'd like to share? I guess at the very end when you and I click on the VA icon, I would have never thought doing that would bring me back to the chatbot. Maybe if you are trying to promote this as a way for people to get help than maybe. \*Participant’s connection froze and disconnected\* \*reenters the meeting\* it should be its own link on the home screen.
7. Any questions for me? I don’t think so. I think this was very helpful to go through this process with you.

## 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!