# 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? I looked up information on a program.
* Have you ever needed information about claims? Does that include Ebenefits? Sure. Yes.
* What information about claims do you look for? Everything from letters to employments, connected to appointments, refills, I think submitted evidence, changed a bank account. I use MyHealtheVet now.
* 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? Chatbot and several phone numbers. Sometimes there are emails, the last one, schedule and manage your appointments.
2. What does the option in the grey box represent… where would that take you? Honestly, open another page with a bunch of choices, and then another page to finally take me to the virtual agent.
3. What is your experience with chatbots been like? Mostly good. I like them to get directed to where I need to go. From hotel reservations to customer service. It cuts down on phone traffic.
4. Based on your experience,
   1. Where would you expect to find the access point to a chatbot on a web page? Open the bot seems to vary where to open, but usually it pops up on the lower right-hand side.
   2. Where would you expect the chat window to live on your screen once you’ve opened it?

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

1. Have you seen/used the chatbot of VA.gov? No.
   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? On a page where it looks like we have 30 more options before getting to chatbot. If we were on Disney, it would just open chatbot, but here we are where I thought we would go.
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? I will backpedal if this is the chatbot I will take back what I previously said. If I wanted to find out about claims I would write claim status
2. OK and what kind of reply would you expect? 3-4 choices about claims.
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? It says to sign in for more information, and it redirect link to a claim and appeal page. What I expect.
   * [if incomplete response] What other options has it presented you with?
2. What would you do next? Would you sign in? Sign in.
   * Why? /Why not? Because I am hoping for specific answers about my claim status and if I continue with signing in it would give me generic information.

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? I am making my unsure face because if I don’t sign in how do they give me my personal information without signing it. They would need my information.

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

1. How would you do it? I would click the blue sign in the chat.

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]? Populate the sign in choices.

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? Multi sign in page, and I would sign in with whichever logon you feel most comfortable with, which mine would be DS Logon.
2. Have you ever used the other sign in option? I have used MyHealtheVet, I do not like ID.me because that one is on a bunch of websites that my teens shops at. Why would those sites need my social security number?
3. What feels like the next step to continue signing in?

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?
2. What did the Chatbot reply… can you read aloud anything that stands out? The new browser? I can’t say I really paid attention to the browser. It looks like the chatbot answered my question so now I can log off now.
3. What are some things that popped up on the HM website? Are you talking about the lock? I didn’t even see that last time.

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?

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

1. What are some things you noticed that time that indicated you were signed in?
2. Is it important to you to know you’re signed in? With new places/websites if I have never signed in before. Not really when I type in the location of where I am going.
   * Why’s that? Either I am navigating from a saved page, or I am typing in the URL that I know is a creditable website. That is why I do not like ID.me, why would I sign in with my military information for 10% off shoes?
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?
5. Without clicking anything, what would you do next? Lower out the chatbot and sign out. The question is answered, I got what I needed, and I would close out. Based off my experiences with Ebenefits this is the most information I have gotten.
6. This is enough? If that was my only question, I am satisfied with this 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 don’t immediately see it. I would think there is an option on the top. I would click on my name and sign out there.
   * *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? I expected there to be a blue button to sign out. I am done chatting thank you.
   * Why?

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

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

1. OK – can you describe what’s happened?

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 scroll down to see if it is in the blue box, I don’t think it is, so then I would put it into the search.

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?

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? The same thing because I am not logged in again.
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? I don’t think I would have any feelings about that. I signed out so I know I would have to sign back in. That is on me.
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 don’t really mind. I don’t have a strong option. I think I would be feeling fine either way. I would not expect it to be there.
4. Do you have a preference? I guess to be there so the information is there so I could go back to it. Nice to have but not a need to have.

## 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>] **\*CAN NOT SEE PARTICIPANT’S SCREEN\***

1. I think that I would like to use this system frequently:
2. I found the system unnecessarily complex:
3. I thought the system was easy to use:
4. I think that I would need the support of a technical person to be able to use this system:
5. I found the various functions in this system were well integrated: Does not feel there is enough information to provide accurate information
6. I thought there was too much inconsistency in this system: Does not feel there is enough information to provide accurate information
7. I would imagine that most people would learn to use this system very quickly:
8. I found the system very cumbersome to use:
9. I felt very confident using the system :
10. I needed to learn a lot of things before I could get going with this system :

**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? Honestly do not remember what the chatbot said. It is clear. I like it. I think the bullet points are helpful especially for new users.
2. Was it clear what all the buttons did (button labels) or where all the links went? Would you rephrase any of the buttons? My only things are that I took a minute to find the sign in because I thought the active link and blue buttons were confusing.
3. Based on your experience today, are you willing to use the chatbot again? Yes, I really hope this replaces the 2 ½ hours on the phone.
4. What additional feature to the chatbot would improve your experience? My experience no. I didn’t pay a lot of attention on the how to, I always think of my father and spouse who don’t really interact with chatbots. I think you should have instructions on how to interact with chatbots. For my spouse I think keeping the history on the chatbot would be important because of the memory loss.
5. Do you have any other feedback you'd like to share? When we first plugged into the page, I did not think that bot was the actual bot I think you need to make it stand out more. Until you told me that was the actual bot, I did not know that was it. I figured we would have been directed to 3-4 other pages. Maybe make it stand out more.
6. Did you think it was a screenshot? No, I thought it was an instruction screen.
7. Any questions for me? I don’t.
8. Anyone on the line like to ask any questions? No, it is all good. Thank 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!