developer.va.gov - Lighthouse OAuth2.0 SAML Proxy Page Redesign Research Guide - Veteran Representatives

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Introduction (3-4 minutes) *Enable Captions*

Thanks for joining us today!

My name is [Facilitator Name] and the goal of our research is to talk with Veteran Representatives and understand your experience using a claims submission application prototype and gather insights and feedback from you.

We have some team members on the line observing. They are colleagues who will be helping to capture notes for me and who help to improve applications developed for VSOs like yourself. We will be observing and listening to your feedback and thoughts on the screens which is valuable in improving the user experience.

Are you ok with these observers joining us?

Before we start, there are a few things I want to mention:

- This entire session should take no more than 30 minutes. To not keep you much longer, I may occasionally prompt you with the next question or topic.

- In this session, we want to hear your honest opinions. We are not testing your knowledge.

- We also want to note that the information you share will not be attributed to you directly.

- If for any reason and at any time you want to stop the session, please let me know.

Do you have any questions about the logistics I've just mentioned?

- Are you comfortable if I record my screen and audio as we talk today? We use the recordings to confirm that we have captured your opinions accurately.

- The recordings are destroyed after we complete analysis. So, none of your comments will be attributed to you directly.

- [If yes] Once I start recording, I am going to confirm that you are ok with participating in this research and with me recording this session. *[Start recording.]*

Warm Up Questions (3-5 Minutes)

To get started, I want to know a little bit more about you.

1. How long have you been a VSO?

2. Where do you work?

    1. Is it a state, county or Big 6 VSO organization?

3. Are you a Veteran?

4. When you submit claims on behalf of the Veteran, what tool(s) do you use?

Prototype (15-20 Minutes)

Introduction to Questions

I'm going to paste a link to a prototype into the Zoom chat. I will also ask you to share your screen with the prototype tab pulled up. The prototype is designed to simulate a real experience although some information has been pre-populated for the study. For the rest of the session, I would like you to think aloud and tell me exactly what you are seeing, feeling and thinking.

Veteran Representative Scenario

I would like you to imagine the Veteran Service Organization you work for is trying out new software for claims management. This software lets you submit a Power of Attorney (POA) form in a way that lets you immediately access the Veteran's relevant data in VBMS. This way you have quick access to a Veteran's eFolder. When you start using the software, you begin on this screen.

To reiterate, throughout the session, I would like you to share what you are seeing, feeling and thinking aloud.

Tyler Tech Benefits Screen

What would you do here to submit claims directly into VBMS? [Proceed]

Lighthouse SAML Proxy Screen Questions [Listen, observe and probe when possible]

1. What are your initial impressions of this screen?

2. What do you think you are being asked to do on this screen?

3. Why do you think you are you being asked to do this?

    1. Do you have any questions or concerns?

        1. [If yes] What are your questions or concerns?

            1. What, if anything, might help to alleviate your concerns?

4. What do you think will happen after you do this?

5. What, if any, additional login options would you expect to see?

6. If you had a magic wand and could change anything on this screen, what would you change?

7. Have you seen a screen like this before?

    1. [If yes] In what scenario?

Veteran Representative Scenario Continued

Let's continue forward through the prototype. Imagine you want to try out the new software to immediately access the Veteran's data in VBMS. What would you do next?

In this scenario, you have an account through the identity provider ID.me that you can use to log in. To reiterate, there is pre-populated information that we will see. You will not have to enter your personal information in.

Log In Flow Screens Questions [Listen, observe and probe when possible]

Pause at the screen with 2FA code filled in.

1. What, if anything, on these pages stand out to you?

    1. Do you have any questions or concerns?

Veteran Representative Scenario Continued

Let's continue forward through the prototype and click the continue button.

Okta Consent Screen Questions [Listen, observe and probe when possible]

1. What do you think you are being asked to do on this screen?
2. Why do you think you are being asked to do this?
3. If you were to "allow access", what do you think you would be allowing access to?

      a.   What do you think will happen after you do this?

4.   On a scale of 1-10, 1 being not at all likely to allow access and 10 being very likely to allow access, how likely would you click "allow access"?

      a.   Why did you rate your likeliness to allow access in this way?

5.   Have you seen a screen like this before?

      a.   [If yes] In what scenario?

Final Thoughts and Wrap-Up (3-5 Minutes)

1.   What are your overall impressions of going through these steps to sign into your claims software?

      1.   What, if anything, stood out as especially positive or especially negative?

      2.   If these steps were needed to submit POA directly to VBMS, what would you think about that?

2.   [Only ask if participant demonstrated concern about their own data showing instead of the Veteran's they're assisting] I'm going to share one of the screens you looked at earlier. [Share screen with SAML Proxy screen] Let's say that by logging in, the information you'd see is the Veteran's you're assisting for work and not your own. What, if anything, could be added to this screen to make to make it clear that you won't see your own data?

3.   Do you have any final comments, suggestions, or thoughts?

Thank You and End (2 minutes)

We really appreciate you taking the time to share your thoughts with us today. Your feedback is so helpful to us! If you have any questions, please feel free to reach out to us.

Thanks again, and enjoy the rest of your day!