**STEM Usability Testing Discussion Guide**

**Participant 1 – Douglas Dickover**

**Intro - 5 minutes**

Thanks for joining us today! My name is Amy and I also have some colleagues on the line observing and taking notes. Today we're going to take a look at the application for a new scholarship for Post-9/11 GI Bill beneficiaries.

Before we get started, a few things I want to mention:

* This entire session should take about 45 minutes. I don't want to keep you much longer than that, so I may occasionally prompt you with the next question or topic.
* During this session, we want to hear your honest opinions. We're not testing your ability. We just want to improve these tools to better meet Veteran's needs. I won't be offended by any opinions you express and welcome your feedback.
* If for any reason and at any time you want to stop the session, please let me know.

We will be working in a prototype so some functionality will not work as expected. For example, when you click on a field, an answer or selection may pre-populate or alternatively, you may click on something and nothing may happen. In those cases, I'll let you know that the functionality isn't working and ask what you would expect to happen.

Are you comfortable if I record the screen and audio as we talk today? We use the recordings to confirm that we have captured your opinions accurately. The recordings are deleted after we finish analysis, and none of your comments will be attributed to you directly.

* If yes: Great - thank you. Once I start recording, I'll ask again so we have your audible confirmation.
* If no: Ok. My team will just observe and take notes as we go.

Start recording.

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

**Warm-up Questions - 5 minutes**

Before we look at the website, let’s start with a few warm-up questions.

\*\*Has done usability testing before

1. Are you currently using or have you ever used your GI Bill education benefits?
   1. I have not yet because was using tuition assistance and then workplace incentive. So looking to expand beyond that.

* What school are you attending / did you attend?
  + Yes, getting Bachelor’s at IT management
* What did you / are you studying?

1. Are you familiar with the Rogers STEM scholarship?
   1. Read about it, but haven’t used it

* If yes, what have you heard about it?

For our session today, I'm going to give you a couple tasks to do online. While you're going through them, it would be really helpful if you'd think aloud - kind of like you'd do if you were talking to yourself. We are interested in your first reactions, what you're thinking & wondering as you go through the process. The more you say about what you are thinking and wondering, the more we’ll learn.

When you think aloud, it helps us understand what works well and where we might want to make improvements to make things even easier. If you have questions, it’s likely that many other Veterans will, as well, so feel free to ask them along the way.

I'm going to give you control of my screen & mouse. I'll pass control to you and you should receive a message that prompts you to control the screen.

**Task 1: Navigate to STEM form - 5 minutes**

You've heard about a scholarship that the VA offers called the Rogers STEM scholarship and are curious if you could receive this scholarship. Your initial search took you to VA.gov. How would you go about finding the application for the Rogers STEM application from this page?

Not making assumptions…I see the education section right there and looking at those options. I’d probably click Compare GI benefits by school. And if that didn’t work I’d go to Apply for education benefits. Clicked Compare GI benefits link. Changed selection to online. So I’m looking for…I’m looking for scholarships…I’m thinking which GI benefit do I want to use..looking there. I’m not seeing scholarships with that. I’ve never seen Cumulative Post 9/11 before. It doesn’t mention the STEM one. So I’m not seeing the scholarships….maybe at the school. Typed grand canyon and clicked Search. Scrolling down through options…scrolling down to see options. Clicked Roger STEM scholarship in filters. Ah Rogers STEM scholarship (and made school disappear). It’s kind of hard with the lag…I’m looking to see if there’s something I can click to see if it’s eligible. I clicked my school and the Rogers STEM scholarship. There are 0 search results, so does that mean my school isn’t eligible?

Things to watch for:

* What areas of the page does the participant explore?
* What does the participant click on?
* If searching or talking about the scholarship, what terminology does the participant use?

**Task 2: Determine Eligibility - 10 minutes**

Now let's say you've reached the application form. Based on your real life field of study and the benefits you have remaining, how would you use this page to decide if applying for the Rogers STEM scholarship is a good choice for you?

BA in IT management

Right there I see “Sign in to start your application” What I’m looking for right now is determine eligibility. I see the Check your remaining benefits and then would look and see if my program is approved for STEM (that link). I’d want to verify that I was eligible. For me, I would look at approved programs to see if I’m eligible.

Checking benefits…I’d want to compare how fast I’d burn through my 9/11. I’m trying to figure out the best way to pay for it – either through work or GI benefit. So my question is figuring out how it all fits together. I’d need to talk to a VA counselor or school counselor.

For the VA, I’d be looking on this page or other page to see who I would need to talk to. Or Google VA counselor to find the right person for this. I have a regular academic advisor and a financial counselor. Those are the people I would start with to ask questions.

\*scrolled through the subway map

Click on STEM programs – would expect to see the 4 categories of STEM broken down to see if I have eligible program. Since I’m in management, I’m not sure if IT and IT management. Prompted to click STEM. Did Ctrl F and search technology…ah, only 122 results. Changed to information technology…ok, so I have 4 choices. So there’s one for basic info technology…oh look and there’s Computer IT services admin and management. This would give me confidence that I’m eligible

Prompted to return…went to initial tab and then went back (missed the middle tab)…then tried to hit back button on PDF

Using Post 9/11…Have used all or within 6 months, so no I haven’t done that. And I clicked on approved programs, so I know that I’m eligible.

Would you apply? Yes, absolutely.

Things to watch for:

* Does the user look at the subway map or click the link at the top of the page without reading anything else?
* Where does the user look to determine eligibility?
* Does the user read to determine eligibility or just start the application?

**Upon completion of task**

* What do you think the requirements are to be eligible for the STEM scholarship?
  + STEM program of study / credit hours
  + 6 months or less of benefit left
  + Using Post 9/11 benefits
* What did you think of how the requirements were communicated?
* Would you expect to be eligible for this scholarship?
* If you were unsure if your degree qualified for STEM, what would you do?
* How do you know how much entitlement you have remaining (e.g. something they track, how often do they check, etc.)?
* In terms of determining the requirements for this scholarship, on a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task?

Note: User may continue to Task 3 without a prompt

**TASK 3A: Apply for STEM - 15 minutes**

Now we're going to do some role playing. Let's say you're Sammy Smith and you're working on an undergraduate degree in **Chemistry** from **Chicago State University**. How would you go about filling out this application? For this prototype, you will log in as an authenticated user.

\*Remember to think aloud as you go through so we can hear what works for you and what doesn't.

Checking benefits... see what they say / If they don't know and say they'd check, respond < 6 months.

Things to watch for:

* Do any questions cause confusion or require additional research for users to answer?
* Does the user try to skip any questions?
* Does the user click the Additional Info component "What if I don't have a bank account?"?
* If ineligible, how does the user react to ineligibility alert?
* If they click "Check remaining benefits", what would you expect to happen (e.g. modal, new page, etc.)?

**Upon completion of task:**

* What parts of the form would be the easiest for you to complete?
* What parts of the form, if any, might you have to do some research to find? How would you track down that info?
* Did any of the questions seem unnecessary?
* For the banking information, how do you think the VA will use that information? What are your thoughts on whether the info you provide here might impact other payments you receive from VA?
* For the school ID and email, would you be likely to provide this information? What do you think it will be used for?
* In terms of applying for this scholarship, on a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task?

**TASK 3B: Triggering the Alert - 15 minutes**

Now we're going to do some role playing. Let's say you're Sammy Smith and you're working on an undergraduate degree in **Chemistry** from **Chicago State University**. You know you have about one semester left of entitlement remaining, but aren't sure of the exact amount. You would like to apply for the STEM scholarship if you can. How would you go about applying for this scholarship? For this prototype, you will log in as an authenticated user.

\*Remember to think aloud as you go through so we can hear what works for you and what doesn't.

*Prompt at "About how much of your entitlement do you have left?"*: Say you clicked "Check remaining benefits" and found out that you have 7 months left. What would you do?

Clicked Sign in to application, clicked sign in with DS logon. Scrolled down page…that’s the same as before. Clicked Start Application. Oh, my name already, I like it. Clicked Continue. Clicked Post 9/11, clicked Continue. STEM…I believe I’m eligible…Yes…More than 6 months. It appears you are not eligible…why am I not eligible? Well I don’t know…

So if you used all of your education benefits…is this scholarship only for if I have used all my benefits or is this supplemental? So I’d need to look into that and learn more.

On that page we were on before…starting page….in my thought process…(on CT page) I would hope that this Rogers STEM scholarship would be a hyperlink that would take me to info on that scholarship and in that info it would tell me that eligibility would tell me that it would be when you had used all your benefits or within 6 months of doing so.

It explains it…but I’m irritated thinking I was eligible and got this far only to find out that I’m not. I understand the process. I’ve done all my paperwork and all that…transcript to my school and I start going through the process. Maybe if I had the scholarship I would know if I was eligible.

I would say would you still like to apply – No (for himself). For Sammy, clicked Yes.

(Why would you apply if ineligible) Sometimes websites aren’t perfect, so I would want a formal No. I guess this may not be an official No.

Inputted everything.

Do you know your school ID off the top of your head? Not off the top of my head, but its in my email. It is not my SSN. I have a school email. I have a DC@edu address and I have to go into their application to check it, but I go into my personal email to check for notifications.

For email address, which one would you use? Personal

I don’t have a home phone.

Like could this interfere or worry that it would interfere with any benefits I’d be receiving? I didn’t before…I would make sure my bank information is the same so I would avoid any conflict.

I would open all these (but didn’t – summary page).

Ok, so there’s my…what I would do is print this page (blue button) and save as a PDF

How did that go? It was easy, what I’m curious on is that with all the pre-reqs, I didn’t have to enter those. When would I enter all of that? Pre-reqs? So it said your current education, I didn’t’ see anywhere to put that in? So do I have to contact my school and get my transcript and all that? So I’d wonder if I missed something because I didn’t enter any of that information. – Was expecting to have to provide more info -

I am an overthinker, so I try sometimes to think too far ahead. When you ask for something, I want to give it all to you

How do you think school id and email will be used?

* Verify information

Things to watch for:

* Does the user think the application would let them continue?
* How do users react to alerts and warnings about eligibility?
* Do any questions cause confusion or require additional research for users to answer?
* Does the user try to skip any questions?
* Does the user click the Additional Info component "What if I don't have a bank account?"?
* If ineligible, how does the user react to ineligibility alert?
* How do users exit the application if they are ineligible and don't want to continue applying?
* If they click "Check remaining benefits", what do they expect to happen (e.g. modal, new page, etc.)?

**Upon completion of task:**

* What parts of the form would be the easiest for you to complete?
* What parts of the form, if any, might you have to do some research to find? How would you track down that info?
* Did any of the questions seem unnecessary?
* For the banking information, how do you think the VA will use that information? What are your thoughts on whether the info you provide here might impact other payments you receive from VA?
* For the school ID and email, would you be likely to provide this information? What do you think it will be used for?
* What did you think of the alert?
* What would you do after you saw this message?
* In terms of applying for this scholarship, on a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task?

**Post-Task Interview - 10 minutes**

Circle back on

* Eligibility alert - For the "Check remaining benefits" helper in the form, what do they expect to happen (e.g. modal, new page, etc.)?
* STEM program dropdown - How would they categorize their "real" degree?
* School contact details - Is your school ID the same as your SSN? If applicable, what would you put down for your school email?
* Direct Deposit: For the banking information, how do you think the VA will use that information? What are your thoughts on whether the info you provide here might impact other payments you receive from VA?

Those are all the tasks I have for you today.

* Do you have general thoughts or feedback on the application that you’d like to share?
* Any questions for me?
* I want to give a chanced to the other people on the line to ask a question.

**Thank-You and Closing - 3 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, thanks so much and enjoy the rest of your day!