**STEM Usability Testing Discussion Guide**

**Participant 3 – John Fleming**

**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 - for VA

1. Are you currently using or have you ever used your GI Bill education benefits?
   1. No, never used GI Bill benefits, but have used Voc Rehab

* What school are you attending / did you attend?
  + Finished in Nov 2018
* What did you / are you studying?
  + Information and Cyber Security
  + Not pursuing a teaching certification

1. Are you familiar with the Rogers STEM scholarship? No

* 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?

I would scroll down to uhhh…went back to 4 squares. Education…ummm…I would go to the Education and training link. Click on it. Where it says VA education and training benefits and scroll down….went too far (lag)..hold on…I was looking for the tab that said more information. Clicked More information and resources. Looking through links…

What kinds of words or phrases are you looking for? I’m looking for anything that has to do with scholarship. And I don’t see that.Scrolling through options. Clicked Other VA education benefits. I see everything for the GI bill, but nothing for scholarships so far. I guess I would click on More resources and then Non-VA resources. Do you know where you are? I’m in Education and Training space. Looking…this is the way I would expect to find scholarships page.

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?

Scrolling through subway map. I was looking at qualifications and it seems as though I qualify. Looking at everything I would need to fill it out. Where I could go to get help. If I wanted to know more about GI bill programs. It’s telling me that I could. Then it tells me that VA will process in 30 days.

It says to be eligible…I guess if you wanted to know more about the scholarship you would click on the link you have there. And if you’re already signed in, you can check remaining benefits to see if you have any left. And you can see programs approved for the scholarship.

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.

I would personally probably read the whole page. I think having the Start the application at the top may cause some people to jump the gun. If I didn’t have you here with me, that’s probably what I would have done and just gone straight to the application without reading and I may not have been prepared. But it is here at the bottom…but I probably would take it at the top. After reading everything, I would start the application. And start to fill out everything. Everything looks pretty simple. I see that you have a finish application later which is helpful so I can come back later and they save all my information.

On this page, it’s asking me about my educational benefits I’ve used or are currently using. So I’d scroll down and find the right one. The one I found that I would use or had used, I’d click it. I was looking for the Voc Rehab one. And I don’t see it. Yeah, I don’t see that.

Prompted to Post 9/11

Selected 9/11 and continue. It’s asking me some questions. Are you enrolled in a STEM degree? Yes. How much of your educational benefit..if I didn’t know, I’d click the Check your remaining benefits to find out.

If I clicked on that, I think that it would tell me which GI bill I was using and if I’ve used it or haven’t used and how many months that I have available. It would take me to another page. I guess it would be whatever I was using…like an educational benefit or whichever GI bill I was using. That would be a subtitle.

Clicked check remaining benefits…Yep, this is what I would expect to see. I know its asking me to sign in because I was already signed in, I don’t know why it’s asking me again. It seems kind of redundant. Alright and it’s asking me if I’m eligible to use this tool, which I am. And it’s asking me do I have one of the free accounts. Which I do.

I don’t see…unless it’s at the bottom. I don’t see I guess see I would think that would take me back to the page I was on where I was filling out the information. I didn’t see anything that clearly said that. And I don’t know if this right here (the correct tab) and I know that links sometimes open up new tabs.

More than 6 months…then continue. And it tells me that it appears that I’m not eligible for the scholarship. It says I haven’t used all my educational benefits or are within 6 months of doing so. And if I wanted to explore other educational benefits by clicking the link and it’s asking me if I would still like to apply. At this point, probably 50/50 because sometimes even though you don’t check all the boxes, you still get in.

It takes me to the page to apply to the scholarship. And I would put in the name of the degree and the name of the school. I think you said Chicago. Then it asks me for my school student ID number and I would continue to fill that in.

School ID was not SSN. If I was filling this out and hadn’t decided on a degree, how would I go about completing this? I guess I would save my information. For the teaching, is it a certification I would get or a teaching degree? I guess I would just research a school, preferably one close to me and then whichever one I find that I like, put it in here. I still wouldn’t have a school ID number unless I had already applied. But would it let me continue without it? I may or may not have a school email. And click continue. Asking about my military details and if I’ll be going on active duty. If I had another address, I’d put it in line 2 and state, city and postal code. I would also put in my email address and confirm my email address. My home number if I have one and a mobile number, which is required. And then it asks how they should contact me. For me, I’d probably click more than one. I’d like to do Email and Mobile phone. I would expect they would do both email and mobile phone. They might send something through mail even though I clicked email and phone.

I guess it wants to know my banking information…and it wants a check number so you’d have to have a check. Well I guess there’s checking so you don’t need a check number. And if I didn’t want to use direct deposit – they would probably mail me a paper check or a Visa card or something like that. And there’s a link that if I don’t have a bank account, it would tell me what to do. So I do have one so I’m going to continue.

So this page let’s me review my application. And if I wanted to look at information I would just expand and see everything in that section. I might look at education benefit. I guess it gives me a confirmation page..and it gives me a choice to print it. Which I probably would, just in case. And if they say they had never received it, I could give them a confirmation number.

Pretty simple other than a few things – apply at the top of the page. The one where you had to expand each one…I probably just would have had it all there. That might deter me from not looking at it, the way they had it. Figuring out if it had opened up another tab or not.

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?

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!