**STEM Usability Testing Discussion Guide**

**Participant 4 – David Bullman**

**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.

Did one of these…I think it was almost 2 years ago, I think we stepped through a website that was in design

1. Are you currently using or have you ever used your GI Bill education benefits? I am currently using it – Post 9/11

* What school are you attending / did you attend?
  + University of Maryland – Baltimore county
* What did you / are you studying?
  + Asian studies

1. Are you familiar with the Rogers STEM scholarship?

* 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?

Since I’m not sure how to spell Rogers, opened Search and typed rogers and clicked button. See what that does for me…That’s a lot of non-relevant stuff. Rodgers search…nope..I’d go into VA Benefits and Health care, education and training clicked View all education. Scroll through options. Click other educational benefits…I’d probably click here because none of the others seemed to cover scholarships. Clicked More resources. At this point, I’m probably going to search again since I can’t. Search scholarship. So there is something about scholarships, but that’s survivor benefits. Here we go…scholarships and grants. So now, I’m back to that same [page]. None of these headers look like. It seems like it would be here under Other educational assistance programs but I didn’t see it when we clicked through. I’m just trying to find anything that talks about scholarships. At this point, I would…benefit forms, probably not there. I would assume its not there. I’m not sure where I would look next. That’s all managing current benefits. Click eligibility. Maybe we need like a top level scholarships sub-link. So where is it? [ Told to go to How to apply]….so you actually have to get into the form Clicked find your education benefits form…ah, there it is. So there we go…so I did see her name in the search. At this point, I would probably click that link to get more information about that. But this tells me the basics right here.

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?

[in VA.gov]

So I can answer yes to the first, I do not qualify for the 2nd, and I do not qualify for the 3rd, so I would click No. My understanding is that for Post 9/11 I have 36 months and I only used 3 semesters worth, so that would be maybe 12 months worth. If I were actually…if I was actually a STEM student, I might check remaining benefits just to confirm. But I know I’m not going to meet the 3rd requirement, so I’m not going to click there.

I would have expected to find out more about scholarships in Gi Bill benefits. I wouldn’t have thought I needed to go to the application before I knew what I was applying for. The way I ended up getting there…the eligibility one…that one helped me get to a better listing of what there is. But even here, there’s nothing here about scholarships. I think I would have gotten there faster if there was a higher level scholarship listing.

[in prototype]

Based on my internal map, I don’t think I’d click through there. I haven’t used them all and I don’t think I’m within 6 months and I do not have a STEM degree so I would be done. I might click Check remaining benefits just to see where I am. I would expect to go to some sort of dashboard and I should probably know what that looks like but I haven’t checked them. But I would see a dashboard showing used and remaining benefits. That’s about what I would expect and I would have to log in.

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?

If I’m Sammy, I’m actually going to click approved STEM programs first. This seems like the first level of disqualification to see if my major is covered by this or not. Scrolling through options…I can Ctrl F? Oh wait,…I see Chemical engineering. Search chemistry. 26 results. So there’s just regular straight Chemistry, so based on that I would assume I’m eligible. And I would say I’m eligible under Chemistry or General Chemistry. So then I would go back to application. So I’ve checked my approved programs and I would check my remaining benefits. Seven months left…that tells me that I need to give myself a reminder to come back in a month ☺ Because then I’ll be within 6 months.

My calendar reminder has gone off and I’ve gotten my prepared list of information. Looking through subway map. Click Sign in to application. So there’s my eligibility list again…and click button. Click continue on part 1. Did you tell me which one? Post 9/11 continue. Clicked Yes, 6 months of less. Continue. Chemistry. All other info.

School ID is not SSN. I use school email for all school related things.. Not on active duty.

For this email, I’d probably use my Gmail address. I don’t have a home phone. I would probably click all 3 of these (ways to contact).

My payments I already receive from the VA already go to the checking account. Other than having been in the Army long enough to know that things can get screwed up, I wouldn’t think it would cause any issues. I think it would just update or get added to my current information. I wouldn’t expect that to happen, but it wouldn’t surprise me if I did. I wouldn’t assume this application would overwrite the existing settings – for lack of a better term for it. At this point, I’m just applying so I wouldn’t expect it to impact anything at this point. But without you having asked me all that, I probably would have assumed everything would be okay. I would expand these, to double check everything (doing that).

I’m going to do what everyone does and check the box without reading the policy. And I would print this out just for my records. I’d probably just PDF and save it digitally.

It was pretty easy – it was surprisingly simple. I might have expected just based on the process I went through just to apply to school, I would have expected this to be a lot more involved. Obviously because I’ve been using my benefits, the VA has a lot of that info. But this was short, sweet and easy. Nothing hard. What am I studying and what do I want from the VA. A lot easier than my Chemistry classes.

(He didn’t see the box asked about below – disconnect between saying less than 6 months, but summary said more than 6 months)

The eligibility box tells me that it’s somewhat connected to my account. So the system clearly knows that I haven’t used it all or isn’t within 6 months. At that point I would have, like I did when I realized I wasn’t eligible yet at 7 months. If I thought I was within 6 months, I would go in and make sure that things were up to date. If there was a disconnect there, I would probably look for a phone number to call to figure out the discrepancy. The only way this application could tell me I was ineligible was if it was connected to something else. It only asked me a Yes/No question about the time period – and it had to check somewhere to make sure the answer is correct. It seems like the system is validating it. It didn’t ask me when I was using my benefits...and then it did what it did to show that we agreed to disagree.

If I had gotten this and was certain I was within the timeframe, then I would do the Yes, I would still like to apply. Especially if I had used all the benefits. There would have been communication with the VA. I would know that I didn’t have any benefits left. I would assume that would cause a human to check my benefits.

How use school ID and email? Verify my former or current enrollment in the program. That I meet. Was a student and matches what I said.

Contact all or any? All – I would check all three because I don’t have a preference. Letting them know that any of them are fine.

Veterans’ Office? Short answer is No, longer answer is that there is someone in registrar who has someone who works for us. A different department called off-campus student services that is dedicated to veterans and other student groups. They are our “go to” for help.

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!