**STEM Usability Testing Discussion Guide**

**Participant 6 – Joe Lobban**

**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.

Usability testing? Yes I have

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

* What school are you attending / did you attend?
  + Liberty University
* What did you / are you studying?
  + Double major – Christian Leadership in BS and BS in Business Administration

1. Are you familiar with the Rogers STEM scholarship? Yes

* If yes, what have you heard about it? It is available for people without Post 9/11 GI Bill and looking for a degree in STEM. And can be used in conjunction with Post 9/11 Gi Bill benefits.

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 go 2 ways first to I would scroll down and I would look at Education or I would go to normally I would go to the top and open VA Benefits and Health Care and go to Education and training. And then, \*sigh\* what I would do..what I would like is to see with Education and training. Here’s the GI benefits ,check all that. I would try and find another hyperlink for additional benefits or STEM scholarship, like down here on the bottom. (top nav). I’d probably be looking for a hyperlink. Or I’d probably just end up going to…I would look through all these because I would go to about GI Bill Benefits because it doesn’t say anything about STEM scholarship (clicked About)

Yeah, and I’m not seeing anything here on the STEM scholarship.

What are you looking for?

Others or more resources. Other benefits. Additional benefits. That’s what I would use. Now, like I said “Veterans technology education course” would probably be a rabbit hole…but that could be it.

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?

Ummm…well I would scroll down. Sign in to start your application. I would ignore that and I would look down here to determine eligibility. Have used all your education benefits. Technically I’m 8 months away from that…in the Fall would be 6 months. So yeah, I would look down there to determine eligibility. Do you have a STEM degree – which I don’t. That’s how I would figure out if I actually qualify for it.

Do you think eligible? No

Eligible in future? It depends on the definition of science. I am getting two bachelors in sciences, but one is business and the other is a Christian degree. I don’t think those fall under science degree for STEM, but I would use it if I was looking to get a teaching certification after getting those two degrees.

Determine if programs qualify?

See approved STEM programs. Clicked link. Then I would scroll down either that or I would…can I do a Find on here? I was looking to do a Ctrl F and was going to put in Business. Ctrl F…typed in business. Agricultural business and management not that. There’s 9 of them so I’m going to scroll through each of these. That says Business Statistics…yeah, I wouldn’t qualify for any of these programs. As I said, it was a stretch for business to be considered STEM.

Apply and see what happens?

Umm…I would do it….No. I wouldn’t because I’m also afraid that someone would come in and do some kind of audit. And they would say that you aren’t eligible and we’re going to pull it right in the middle. I hate this for STEM degree. Dog/Pet/Animal Grooming…washing the dog is a STEM degree. And I can’t get it for business. Taxodermist…I actually know a lot of people who quit high school and are taxodermists. Something like that. If those types of things are getting degrees and I can’t, I’d be a little upset.

How easy to figure out requirements? For me, it was easy because I knew where to look. For other people without some type of key on what eligibility requirements are or a hyperlink at the beginning, I think that would be a lot easier. About a 3.

Mentioned helpful to have listing of requirements?

Like…I do actually remember doing a study for STEM. And I told them that I thought the eligibility should be up here before the Sign in. the first thing I see is the Sign in. But if I found out my eligibility before that, there would be no need for me to sign in to start my application. Doing it from the way it is, I would just start my application if I was in a hurry.

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. the eligibility that’s the same thing from the previous screen. Continue. Continue. Clicked Post 9/11. Clicked continue. In this scenario, I am enrolled in a STEM degree? And I have less than 6 months…Continue. …prompted to use 7 months. Then clicked continue.

What does this mean? It’s telling me that because I have more than 6 months available, I can’t apply for it now. I would go back on it and think that it’s a computer error. I’d go back and click 6 months or less. But would I go ahead and click apply, I would still click Yes. By the time it gets through the VA, then I’ll probably have 6 months or less remaining. I just explain it to them that I did it a little early that by the time you reviewed it, I’d have less than 6 months remaining.

School ID is not SSN at Liberty.

Know # by heart? No, I’d have to log in to the system and copy and paste it in

Email address? That I do know – it’s first initial and last name at liberty .edu. I do use that. I use my personal address for VA stuff.

Want info for? To make sure you are still a verified student – that I did indicate that I have less than 6 months left. It means that I’m still enrolled in school and I’m not trying to get money that I don’t qualify for.

Contact info?

I’d hate to say this, but it would probably be neither of them and I’d just get in the mail. Every 8 weeks I get a packet from the VA explaining that I’m still eligible for benefits. They print those 10 pages and I don’t need those. It’s one of those frustrating things where I think my degree…I think I fall 3 days short of…how much time I have.

Phone?

Probably a phone call, but knowing the VA – probably a text message. Saying there’s something that I need to discuss and to follow this link.

Banking…so this, I know this by heart. So this wouldn’t be a problem. But if I was logged into VA, I would expect the direct deposit should just be pulled in. I would like to see if there’s already a direct deposit in my account and block out all the last numbers except the last four and I can just select that. Because I know a lot of people don’t memorize the routing number on their account.

Use one account for all payments? Yes for my VA payments…because I forget I also get paid by the Army still.

If you put in different account – would it impact other payments? I hope not, but knowing how archaic the data system is, I wouldn’t be surprised. Nothing on this page to indicate if it would or wouldn’t have an impact.

Do you want me to give you the honest thing that I would do? I’m never going to review all this stuff here. Clicked privacy policy (and would submit)

So it says it will review in like 30 days so if I was in 30 days of benefits,

I would not print or retain records, I’m too lazy to do it.

If you haven’t heard from them?

That phone number.

Use that number often?

No, I haven’t used it in a little bit since I got all my GI Bill.

Very easy – very difficult? Easy, just because like I said, some of that info would just be there. The routing information. The total months of eligibility – they should be able to see the data of how much I’ve used. It should be able to tell me how many months and days I have left. With those two things, it would be very easy.

Unnecessary? No I think every single one of them…well….I can understand the application for military question for tuition assistance, but possibly for me. This is a VA system, so they should not if I’m out of the military and using tuition assistance. They should already have that information. I can understand the reasoning, but it should already be determined.

Do you know how much you have left? Yes – because I looked it up yesterday. I have to go to eBenefits website. I looked into the education thing and clicked on View details. Because my GI bill had just processed. Processed for my Fall semester – that’s what I was looking for. To see what I was still eligible for. To see if it would cover the full spring semester…the school will get paid, but if the stipend info would be short.

Any downtime? A couple times…but up in the middle of the night…like 9 PM eastern

List? An absolute list. Can’t list anything unless approved by Congress. I don’t think it would be published without it.

So this is a debatable thing I’m talking with my wife over. The job market sucks…this part it says the STEM thing…that was one of the debatable things I was thinking of doing with my regular degree thing. Is this only for STEM degree or teaching degrees? I don’t think there’s anyone who is going to be teaching how to wash the dog.

Explained – that would kind of frustrate me. I see the benefits of a teaching degree. I wouldn’t mind doing a teaching degree after this, but a teaching certification would help me out in a lot of different places. I think I’ll use the lowest example. I’m using a teaching certification for dog washing. That kind of ruffles me a little bit.

I’m going to be done with Bachelors of Science in two semesters. Can I use STEM if I wanted to do welding or something?

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!