**STEM Usability Testing Discussion Guide**

**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? Yes

**Warm-up Questions - 5 minutes**

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

1. Are you currently using or have you ever used your GI Bill education benefits?

P: I have not used them yet. I was using tuition assistance and I’m using my workplace now. They offer an incentive, but I’ve been trying to expand past that.

* What school are you attending / did you attend?

P: I’m currently moving forward with my bachelor’s when I can.

* What did you / are you studying?

1. Are you familiar with the Rogers STEM scholarship?

P: read about it, but I have not used it or I haven’t applied for it. I haven’t needed too much financial assistance yet.

* 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?

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?

P: I would go, I see the education section right there, and looking at those options, I’d probably click on compare gi bill benefits by schools. That would be my first choice. I’d also look at the apply for education benefits as an alternative to look for a scholarship section. [navigated to gi bill on his own]

[ct landing page] so school…how do you want to take classes online?[seemed to not know where to go from there] So if we’re talking about scholarships, I’m trying to see where we’d see scholarships. [was checking the dropdowns] So I don’t see scholarships on that. I don’t see any specific scholarship info here, but let me see if I can find my school. [on srp; had searched for grand canyon university] oh, there it is! Rogers stem scholarship [veteran programs filter]

A: so talk to me about what you’re anticipating at this point

P: the screen shifted so I’m trying to figure out all the options. [kept adjusting filters as he had 0 search results] rogers stem scholarship. So if there’s 0 search results, does that mean the school is not eligible?

A: at this point, the school has not reported that it participates in the scholarship.

[A took back control to switch over to prototype] so that one did not seem to give you what you needed. Let’s say you went through apply for education benefits and you ended up on this page.

**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?

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?

P: now that we’re on the scholarship page, I’m scrolling down to see other things it says. Right away, I see the sign in to start your application. But I’d be looking for this part right here, determine eligibility. I wouldn’t even think about that right there, check your remaining benefits. And then I’d be looking at the approved stem programs. Is my program available? I know I’m it, but I’d want to verify if it is approved. [kept scrolling down to read the other steps] so now I’d want to go back up and I’d try to understand the process. For me, I’d go to see approved stem programs to see if that’s an eligible option for me.

A: you mentioned the check your remaining benefits. Can you talk a little bit about that and how it relates to your life experience?

P: with covid 19 and everything else, I’ve been allowed to telework. That gives me a chance to increase my schoolwork. I’d want to compare that to how fast I’d burn through my post-9/11. I’m still learning on using two different methods of paying for it. My workplace and then my gi bill are two parts. So I’m just getting more questions in my head on how they all fit together and I’d have to talk to a va counselor at the school.

A: when you say a va counselor or school counselor, who would you be reaching out to?

P: on this page, I’d be looking for the points of contacts because I’m not entirely sure who I could talk to. for my school, I have a military academic advisor and a regular academic advisor. They’d point me to the financial counselor instead. So I’d start asking questions.

A: you said you’d first come back up here and see if your degree was eligible. What would you expect if you clicked on approved programs?

P: that it’d be broken down by the 4 categories of stem, and looking under technology, I’d try to find something it-related. I’d try to see if it’s an eligible program.

A: want to go ahead and click on that and see what you get?

P: ok.

A: let me first ask if you can read this.

P: I can. I’d probably end up…can I do control f? I’d try to narrow down my field here [typed in technology] oh, that’s good. Only 122 options here. Ok, so now knowing that there’s a lot of choices, I’d go back to the search. Ok, so there’s 4 choices. There’s one for information technology. I’d write down the number. Oh, there we go right there. […] that gives me confidence that with my current plan, I’d be eligible.

A: [asked him to return to prototype]

**Upon completion of task**

* What do you think the requirements are to be eligible for the STEM scholarship?

P: [read the 3 bullet points after Amy asked him what he thought of them]. So I know that I’m eligible for that. I hit those tickets [?].

A: do you think you’d be likely to apply for the scholarship?

P: yes, absolutely

* + 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.)?

P: I’d click on sign in to start the application.

A: are you familiar with this screen? We’re going to pretend we’ll sign in with the ds logon

P: ok…so now I’ll start the application. Sammy smith, that’s me. Very hard social to remember. Ok. I’m on the next page. Post gi bill. Ok. stem, yes, I believe I am eligible. Oh, wait. Are you enrolled… yes, that’s me. I have more than 6 months of benefits.

[stem summary page] ok, it appears. Why am I not eligible? Well, I don’t know. So if I’ve used all of the education benefits or am within 6 months of doing so. Is this scholarship for if I want to use my scholarship or is it supplemental?

A: [explained the exhaustion requirement] it’s designed to give a little extra cushion so people can finish their degree and they don’t have to worry about where the money’s coming from. So it’s designed for people who are within the 6 month window or have run out of benefits and still need to finish their degree. Is there a way that you think we could phrase that or language that would have made it a little clearer to you?

P: so on the starting page, this one right here, in my thought process is [ct search page] is where there should be something..well, either one [seemed confused] [tried clicking and unclicking stem filter] I would hope that either of these would be a hyperlink that would take me about information regarding the scholarship. By clicking this stem scholarship, it would let me know if I was eligible or not instead of having to go through that whole process.

A: what does this say to you? [items on summary page]

P: this explains it, but I wouldn’t have gone this far without knowing that I’m eligible at this point. I might think that I’m eligible for something. I found my paperwork. I want to make sure I have all my paperwork to apply for this, I’d want to know ahead of time so I don’t waste my time applying for this.

A: what would you do now?

P: I would still expect this to apply [would try to get a formal approval]

A: [asked him to continue. He started answering questions on the school page] do you know your school id number?

[?]

A: Is it the same as your social?

P: no

A: what about your email address?

P: I have that too [?]

A: perfect. That’s great information.

P: ok, are you currently on active duty? I am not. Ok so now it wants all my personal information. address…putting in all my personal information that is required.

A: would you be likely to use your csu email for that or would you use your personal?

P: I would use my personal. I would click 3 out of 4.

A: Is that in real life or is that Sammy?

P: that’s Sammy of course.

A: for here, since you have the 3 options, what are your thoughts on picking one option and saying, this is the way I want va to contact me vs providing a lot of ways to contact you?

P: if I were to rank them, I would do it by email, mobile phone, and then I’d do it by mail.

A: excellent. do you want to continue.

P: ok, direct deposit. The banking stuff’s in there.

A: what are your thoughts on this information and how it might relate to other payments you’re getting from the va?

P: like would it interefere with other benefits I’m receiving?

A: yeah. Do you have any concern that it might impact other direct deposits?

P: I didn’t before, but I do now. I would make sure my bank information is the same as my bank information that I’m using right now so I’d avoid interference. I wouldn’t want this to disrupt my current benefits. Click continue?

A: yes please

P: ok. Let’s see. Review. I would open all these, make sure everything is looking good. I’d click the privacy policy, then I’d click I have read and accept, and then I would submit.

A: did you click the submit application yet?

P: nope. I didn’t know if you wanted me to yet. So I would save this page as a pdf so I could have this reference.

A: how do you think that went?

P: it was easy. All the prereqs that it asks for, where would I enter all of that?

A: could you be more specific?

P: so like your social. I didn’t see anywhere where I would input that in. I have to [?]

A: so you did have a leg up because we went through as if you were signed in, so your social was already in there. you didn’t have to get any of that. Your information about your program, that’s what you answered. What’s the name of your degree program? For you, it would be it management. So that was helpful that you thought you needed a lot of information, but really you needed a little information. on one hand, we did a really good job by making it easy to fill out. On the other hand, you [?]

P: I am an overthinker so I always try to think ahead.

A: sounds like you’re in the right line of work.

**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

* Eligbility 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.

J: when you inputted the school id and email, how do you think the va is going to use that information?

P: I guess they could use it to verify that I am enrolled in the program. So they would compare it to what I’m enrolled in with the school.

C: How do you know how much entitlement you have remaining?

P: since I know that it is a known good way to do it, I’d go back to the main education page, am I eligible? How much time do I have left. I’d use that.

**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!