**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?

**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: Yes, ma’am. I’m using it.

A: which one?

P: chapter 33.

* What school are you attending / did you attend?

P: at the university of maryland, Baltimore, md.

* What did you / are you studying?

P: biochemistry and molecular biology.

A: wow, that’s got to be fascinating.

1. Are you familiar with the Rogers STEM scholarship?

P: yes, ma’am. I’m using it last semester and I’m. using it this summer.

A: your name looks pretty familiar to me

P: yes, I’ve been in the study with you guys.

* 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’d scroll down until I see education. And then I’d probably click apply for education benefit. Oh, there’s more actually, [down the page] or maybe go down to education and training. Anything with education.

A: you want to click on that and see where you end up?

P: [edu how to apply page] I’d probably just read until I find what I’m looking for. [scrolled down past green find your form button]

A: what are you looking for?

P: I’m looking for stem scholarship. Anything that says stem scholarship. [looked around some more]. Ok, then I’d probably do find your education form since I don’t see anything with the stem on it. [opened it] ok, then apply to extend my benefit. That’s what I’d click. [skimmed the requirements] then answer the question, yes. Apply now.

A: Alright, and that’s as far as we’ll go with that one. When you first applied for the scholarship, how did you get to the form?

P: I don’t remember, to be honest.

A: did you end up on the va site and looked around for it or do you think you might have gotten an email or learned about it online on social media?

P: yeah, I learned about it on social media. I learned about it on facebook. So then I googled it and the va page came up.

**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: [scrolled down the page, hovered over the blue sign in button] [clicked blue button]

A: and you won’t be using your real credentials

P: see I don’t have any of this. I thought it would be with ebenefits.

A: we’re roleplaying as Sammy

P: [?] then it has start the education application which is obviously for the stem scholarship [clicked start 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.)?

P: [started filling out form] so for me, is it the chapter 33, right? So I’d click on that.

A: in your real life, are you just using chapter 33, or do you have other benefits?

P: I’m just using chapter 33. [answered yes to undergrad and none to benefits remaining] what’s the name of your school? Chicago state university

A: let me ask you about your degree. What’s the first thing that came into your mind?

P: I would put bs in biochemistry and molecular biology. So not just chemistry. Then the school id. School email address

A: do you know your school id off the top of your head?

P: yes, I do, but it’s not this long.

A: for your school email address, do you have a umbc email address? Do you use it?

P: yes, I use it for everything. Military details, are you currently active duty? No.. address…ok. So for the email address, does it have to be the same as the previous email or does it have to be a different one?

A: that’s a good question. This is the email address va would use to get in touch with you if they have questions about your application. Which would you use?

P: I would use my school’s email. [selected mail] cos I check my email almost every hour. I would pick email over phone. Ok, direct deposit. [read the content at the op] see, I like this one compared to the first one because the first one, after your application had been approved, you had to let them know about a direct deposit.

A: for the banking information that we were looking at before, how do you think va would use that information?

P: actually, I don’t think it would have any impact. This is for this, and whatever else you have, that’s separate. I don’t think it should have any impact.

A: sorry I interrupted you. So you were…

P: submitting my application. I usually don’t go back and check [didn’t review and clicked submit]

[confirmation page] I think it would be nice if students got an email saying their application had been received.

A: would you print this page?

P: no.

A: how do you think this compared to the one you did before?

P: way better. It’s a lot more simple. I like that you can put your direct deposit info down. I had a message in my email that I hadn’t checked for a while and you need to submit your direct deposit info.

[overall understood the requirements for the scholarship]

[would check ebenefits for her remaining benefits]

**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.

**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!