**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: no, never used my gi bill benefits, but I have used vocrehab.

* What school are you attending / did you attend?

P: I finished back in november 2018.

* What did you / are you studying?

P: information and cyber security

1. Are you familiar with the Rogers STEM scholarship?

P: No, I have not heard of that.

* 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 and see education. [scrolled down]. I would go to the education and training tab [hub], click o it, where it says va education and training benefits then continue to scroll down. I went too far. I don’t know. Ok, more information and resources [clicked jump link] and just look around and see… go down some more just to make sure I see everything.

A: what kind of words or phrases are you checking for right now?

P: right now, I’m looking for anything that has to do with a scholarship, and I don’t see that. Go back up. [clicked on other va education benefits] I’m expecting to see something for scholarships, but I see nothing so far. So I guess I’ll click on more resources [left nav item] and then non-va resources. [took him to benefits.va.gov site]

A: this page looks very different than where you were before

P: yeah, it is. I didn’t see any area to find the scholarship.

A: it seems like you’re focused on the scholarship part of it and the keyword and your eyes are not seeing it,

A: let’s say you found a link that says scholarship. I’m going to hop you over to a page you would end up on, so it would take you to 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: [on unauthenticated intro page, he started scrolling down silently]

A: if you want to think out loud…

P: I was looking at the qualifications, seeing if I qualify. Looking at everything I would need for the application, and if I need help, where I can go to get help, and if I wanted to get more information about educational programs, and it mentions the gi bill comparison tool. It’s telling me that I could print out the application or form or confirmation after I complete the application for my records. It says va usually takes about 30 days and they’ll let me know by mail.

A: let’s talk more about [?]

P: I guess if you wanted to learn more about edith nourse, you’d click that link there. if you wanted to see if you had any benefits left, then you’d go down there. You’d also see the programs that are approved for stem scholarship.

**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: I would personally probably read the whole page. Having to start the education application at the top, some people would probably jump the gun before reading, so I’d probably put that at the bottom. If I didn’t have you here with me, what I probably would have done is go straight to apply to education benefit instead of reading everything and I may not have been prepared with all my education history, bank account details, but it is here at the bottom. [button] I see it now. After taking everything, I’d probably go to the top and start the application and start filling everything.

A: any questions here?

P: no, everything looks pretty simple. [started form] I see you have a finish application later so I can save the application and come back later. On this page, it’s asking me about my education benefit, and which one I’ve sued or am currently using. I’m going to scroll down and find the correct one. If I was trying to find the one I was using or have used, I would just check it and continue. If I was unsure, I could click on learn more and see if it’s the correct one.

A: which one are you looking for right now?

P: I was looking for the vocrehab one. And I don’t see it. Yeah. I don’t see that.

A: let’s go ahead and have you select post 9/11.

P: I would select that and continue. It is asking me some questions. Are you enrolled in an undergraduate stem degree? Yes. How much benefit left? If I didn’t know, I’d check my remaining benefits. It would tell me if it’s more or less than 6 months or if I’ve never used it at all, I’d select that one.

A: a quick question on that, if you click on the check remaining benefits, what do you think would happen if you clicked on that?

P: it would show which gi bill I was using, like the post 9/11 and if I’ve used it or haven’t used it.

A: where do you think that would take you?

P: it would take me to another page, whatever I was using, like an educational benefit. Whatever gi bill I was using, that would be like a subtitle.

A: do you want to…?

P: click on it? Yep. This is what I would expect to see. Now I know it’s asking me to sign in, but if I was already signed in, I don’t understand why it’s asking me to do it again.

A: good point. You expect if you’re signed in, you’re a single sign on and you wouldn’t have to do it again,

P: yeah. It seems kind of redundant. It’s asking me am I eligible to use this tool? Which I am and it’s asking me do I have one of those free accounts with my healthevet, ds logon, id.me, which I do.

A: can you return to the application we were looking at?

P: ok. I don’t see, unless it’s at the bottom. I don’t see…see I would think that would take me back to the page where I was filling out information. [went back using the tab]

A: let’s say that you have more than 6 months of remaining benefit

P: ok, I have more than 6 months, and continue. It tells me that it appears that I’m not eligible for the scholarship, and it says that have used all the education benefits or are within 6 months of doing so. I guess that’s what’s making me ineligible. If I wanted to explore other education benefits, I could. And it asks would I still like to apply at this point. I don’t know. I’m probably 50/50. It depends. Sometimes, even though you don’t check all the boxes, there’s still a possibility you’d get in. it wouldn’t hurt to apply.

A: ok, do you want to try to apply?

P: ok, and still hit the continue button. And it takes me to a page to apply for the scholarship. I would put in the name of the stem degree, which would be chemistry. The name of the school where I plan on using the scholarship, and I think you said Chicago something

A: yeah, if you click on it it’ll…

P: it asks me for my student id number

A: was your social security number the same as your student id number?

P: no, it wasn’t. if I hadn’t decided on a school yet, how would I go about completing the scholarship?

A: that’s a good question. What do you think you’d do?

P: I guess I could save my information, research a school. If I already had my degree and I wanted to do the teaching scholarship, or the teaching certificate, is it a certification that I would get or do I have to go back to school?

A: yes to both of those. To be able to teach kindergarten thru 12th grade, public schools need a teaching certification. You would have to go back to a school and take some courses and then do student teaching. When you finished that program, you’d end up with a teaching certification

P: I guess I would research a school, preferably one close to me, and then whichever one that I found that I liked, put it in here, but I still wouldn’t have a school id number unless I had already applied. Would it let me continue if I didn’t have a student id number?

A: interestingly, that’s one of the few fields in the form that’s not required. Good question

P: if I was finished, I wouldn’t have a school email. If I was in school, I would have one. No, I take that back. Some schools don’t. it’s not required, but I’ll click into it. And I’ll click continue. It takes me to step 4 of 6. It asks me about my military details. It asks me if I’m active duty or will be going active duty while receiving the scholarship, and I’ll guess no and continue. It asks for sammy’s address. United states as a country, street address….i would also put in my email address, and confirm it in the second box. Then it asks me how should we contact you? I’d probably want to click that one [mobile] email and mobile phone [clicked both].

A: how do you expect to get contacted? Would you expect them to use both?

P: I would expect them to do email and mobile phone. Yeah. Maybe they might send some things through mail even though I updated my email and mobile phone….so continue. It’s asking me about my personal information. It wants to know my routing number. If I’m approved, they’ll deposit the funds. And it wants a check number, so you’ll have to have your checkbook and pick the next one available, but it also asks for a savings account, but I guess you don’t have to have your checkbook for a savings account. [clicked fields to populate accounts] if I didn’t want to use direct deposit, I would think they’d mail me a paper check or a visa card or something like that. Then it has a link that if I don’t have a bank account, I would expect it to tell me what to do if I don’t have a bank account, but I do have one, so I’d continue.

So this page, it’s to review the application. If I wanted to review the application, I would expand and I’d see everything that was in each section.

A: have you filled out any applications on va.gov that looked like this?

P: I think I have.

A: and this has a particular order. So you would go through and check?

P: to be honest with you, I wouldn’t. other sites, it would just have [?] other than that, I wouldn’t look at anything else if I saw it like this. Then I would check this to make sure that I sign the privacy policy, and then I’d submit the application. Then it gives me the confirmation page, and it gives me the option to print it. [would likely screenshot it].

A: well, that was fantastic. how did you think that went?

P: I think it went really well other than the parts I mentioned. I think it was the scholarship at the apply for education. Oh, actually, it was 3. [one was the application button, to not have it at the top]. The other one I mentioned was where you had to expand each one. I’d probably have it all out there and scroll down instead of clicking each one. That might deter me from looking at each one. [also mentioned the issues with the tabs]

C: dd question,

P: Good question, if I was already receiving [?] benefits… I guess they would just want that information if they wanted to go to a different account. [expected va to keep a record of different accounts ] I don’t know if they would update that. [would want to see a message saying if his account with va would be updated or what would happen].

**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!