**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: I’m currently using it.

A: which benefit are you using?

P: the post 9/11

* What school are you attending / did you attend?

P: the university of Maryland, Baltimore county

* What did you / are you studying?

P: the program is called ancient studies

1. Are you familiar with the Rogers STEM scholarship?

P: no

A: It’s a new scholarship the va is offering to post 9/11 beneficiaries and fry

* 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: since I’m not how to spell rogers, I’d probably give it a try and search for it [searched for rogers]. Yeah, that’s a lot of non-relevant stuff. I might try this. Nope [no search result matched] so I’d probably go here and search for education [nav menu; went to edu hub]. I’d probably look here for other benefits because none of those other benefits seemed to cover scholarships [other va education benefits]. More resources. Alright, so at this point, I’m probably going to just try searching again because I’m not seeing anything that says scholarship. [went back one page and searched scholarship]. So there’s something about scholarships. I see that it’s in survivor and dependents [fry scholarship]. Oh ere we go, scholarships and grants [clicked va education and training benefits] so now I’m back to that same [page]. None of these headers look like, it seems like it would be here, but I didn’t see it in there when we clicked through.

A: Just to clarify, at this point, are you looking for information about the scholarship or are you looking for the scholarship?

P: I’m just looking for scholarship. I’m not sure where I would look next [still on edu hub page]. Let’s see if I’m eligible for gi bill and other benefits and see if if tells me. TUndhis looks like a likely candidate [took him to other va education benefits page] I think I was down here before. Maybe we need a top level for scholarships. So how would you get here?

A: you could go to the how to apply page. That’s one way.

P: [?]

A: It’s kind of a chute that you get routed down

P: oh, there we go [routing wizard 3rd radio button]. At this point, I’d click on her name and get more information,

A: tell me what you think

P: so I can answer yes to the first one. I do not qualify for the second bullet and I don’t qualify for the third bullet, so I’d click no because I don’t meet the 2nd and 3rd requirements.

A: talk to me about the second one.

P: my understanding is that the post-9/11 has 36 months of benefits and I’ve only used 3 semesters worth, so maybe that’d be 12 months worth. For number 3, I’d probably click that just to confirm [approved programs].

A: how easy or difficult do you think it was to find the application?

P: It would have been easier if up here, or maybe at this level, va education and training benefits, I would expect to find information about scholarships. I wouldn’t have expected to go through the point of applying with the application before I found out what I was applying for. The eligibility one, that ended up getting me to a better listing of some of the stuff that there is but even here, there’s nothing about the scholarships [other va education benefits].

**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: so eligibility. Here’s the eligibility list again. Have you used all your education benefits? Based on my internal math, I wouldn’t click on there because I don’t think I’ve used it all.

A: what would you do at this point?

P: out of my own curiosity, I might go ahead and check remaining benefits, just to confirm where I am.

A: what do you think would happen?

P: I would expect to go to some dashboard. I would expect to go deeper into my account. At this point, it doesn’t look like I’m signed in. I would hope that would take me to some dashboard where I would see my remaining benefit for that.

A: if you want to go ahead and give that a click

P: ok, yeah, and that’s what I would expect [to see on the page]

A: if you could return to the page that we were on.

**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: if I’m Sammy, I’m actually going to do this first. [clicked approved programs pdf] because this seems like the first level of disqualification, to see if my major is covered by this or not. Alright, so we got top level alphabetization. I would probably search for chemistry. I would control f.

A: I think you can do that

P: oh, wait. [?] chemistry. Engineering chemistry. So there is just regular straight chemistry. Based on seeing that, I would start to assume that maybe I’m eligible for this, and that I’d be covered under chemistry or general chemistry or perhaps organic or inorganic. Based on that, I think I have a good chance at what I’m eligible for. So I would go back here [to application intro] now, I would go and check my remaining benefits.

A: and we kind of did that when you said you wanted to check out that page later. So let’s say Sammy checks out and he’s got 7 months left. So based on that, it tells me I need to give myself a reminder to come back in a month because then I’ll be within 6 months and I could get the extra scholarship.

A: so time flew and now it’s 6 months.

P: so my calendar reminder went off, and I’ve prepared my list of information because sammy’s high speed and he’s got everything at his fingerstips. Sammy’s too smart and he doesn’t need help fillig out the application, [started reading the below steps for the subway] so I would start by signing in here and begin my application.

A: for these, you can just cick on one of them, the ds logon

P: alright [on signed in intro] so there’s the eligibility list. We already did that so hit the big green button. [started filling out form] [on benefits page] I’m sorry. Did you tell me which one?

A: we’re going to use the post9/11.

P: yes, chemistry. 6 months or less. [started filling in degree/school details] [filled in id/email]

A: for your school, is your id your social security number?

P: it is not.

A: do you use your school email address?

P: for my school stuff.

A: great thanks.

P: are you currently active duty? No. [filled out contact info] for this one, I’d probably use my gmail address I use for va stuff. Mobile phone, I don’t have that. I’d probably click all 3 of these. That’s all fine

[dd page] a: for this one, we’re curious to know, do you have any thoughts about whether this might impact any other payments you might be getting from va?

P: that’s a really deep question. My payments that I already receive from va go to my checking account anyway so, other than having been in the army long enough when they start messing with pay, I wouldn’t have any particular concerns about it. I’d assume it would either get added to or replace whatever education benefits are coming to that account.

A: [?]

P: I wouldn’t expect that to happen, but it wouldn’t surprise me if it did. I would assume this new application would override the existing account settings for lack of a better term for it. At this point, I’m just applying. I haven’t been awarded anything. I wouldn’t expect this to impact.

A: [?]

P: [on review page] I would expand everything….i’d probably print it to pdf and just save it digitally.

**Upon completion of task:**

* What parts of the form would be the easiest for you to complete?

P: it was pretty easy. Surprisingly simple. I would have expected this to be a lot more involved. This is just some basic contact information. because I’ve been using va benefits, the va already has a lot of those details in my background. I thought this was short and sweet and easy.

* What parts of the form, if any, might you have to do some research to find? How would you track down that info?

P: [challenges?] no, I don’t think so.

A: can you talk about the gray box that said you were ineligible?

P: well, that tells me that this application is tied in at least, somewhat to my current account. Like the prefilling. So clearly the system knows that I’ve not met that step either because I haven’t used it all or I’m not within 6 weeks. At that point, I would go back, if I felt like I was within that six months, I’d check my account to make sure my benefits are up to date. If that side of it showed that I wasn’t eligible. [?] It didn’t ask me that, whether I was within that time period. So since I said yes, it had to look somewhere to say whether my yes is correct.

A: so you think the system is validating it on the back end?

P: it seems like it. It just asked me are you meeting one of these two criteria? And it gave me the criteria that it disagreed. So it wasn’t matching up on that end. [Amy was confused that they had gone through the initial summary page, but he had just seen it on the review page].

A: [took him to summary page and explained how it works] what are your thoughts on this?

P: if I got to this and I was certain that I was within the 6 months of using my benefits, I’d probably go ahead and do the yes, I would still like to apply. Especially if I had used all the benefits. There would have been communications from va about that. I would know if I didn’t have any left. And I’d assume that would cause a human to check whether that was right.

J: [contact info he’d prefer being contacted] [?]

C: would he know who to ask for help? Sco? how he’d enter his stem degree name [?]

* 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?

P:

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.

P:

**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!