**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. Post-9/11

* What school are you attending / did you attend?

P: Right now, I’m going to school. SUNY Empire.

* What did you / are you studying?

P: my major is public affairs, but my concentration is in emergency management. That’s geared more towards the fire side. If there’s a huge fire, how to control all the aspects from the logistics to the personnel to the location. that’s what I’m trying to do, more the administrative side of firefighting.

1. Are you familiar with the Rogers STEM scholarship?

P: no, I heard something prior to that. I didn’t really pay attention because I don’t think it applies to my degree program.

A: let’s say you heard about the stem scholarship, and it’s additional moneys to help you finish up your degree.

* 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 probably just start with education and see what they have there [quick links] probably the apply for education benefits link. [how to apply page] I don’t see it on here. I probably should have searched the page like I’m doing now.

A: what are you looking for?

P: I’m looking for scholarships or stem. So probably go to the search bar. Hmm. [searching “stem” brought up irrelevant results]. [tried “stem scholarship”, didn’t work either]. I can’t find it on here using the keywords. It really isn’t prominent. It’s going to take a little while to find it.

A: in the real world, what would you do at this point?

P: I’d keep searching on this site or go to google and type in stem scholarship for va or va stem scholarship.

A: I was trying to do this earlier too. Let’s go ahead…

P: [had clicked on a link] [later went to resources for schools page] it really would be easy if it was under education where the gi bill is to find it.

**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: I would apply for it just in case. [would save it for later on] [read eligibility requirements]

A: tell me about what this means to you

P: that it doesn’t apply to me. It doesn’t apply to my degree. The closest one would be engineering construction. I’d have to see if my program would be approved [opened programs pdf] I’d have to see if that’s the case. [scrolled down the long programs pdf]. Yeah, I don’t see anything close to where mine is. Probably if I go back to my school for the paramedic, I’d have this. I already have my emt. I’d just have to go back to school for my paramedic. I’d have this in my back pocket if I wanted to do the paramedic stuff. It would coincide with the degree I have now. Or I could do a double major and do both. Yeah, there’s nothing to do with fire or emergency management on here. Does it have to be only the veteran or could the veteran’s child apply to this?

A: that’s a great question. Normally I’d have you look at the page for it, but it’s so hard to find.

P: my stepdaughter is going to college next year, and what she wants to major is in here. Her dad retired so she’s a military child and she’s able to get her gi bill and stuff.

A: let’s circle back to this

P: I’d probably double major if I could do this.

A: one of the criteria for the stem scholarship, and we’ll take a closer look at this, so you’re using your chapter 33 benefits?

P: no, I don’t have gi bill benefits anymore. I’m trying to get vocrehab. I have a vocrehab appointment tomorrow.

A: good luck with it. I’ve heard very good things about that program.

P: one of my friends got his master’s degree with that program, mental illness.

A: what are your thoughts on whether you’d be eligible?

P: for me right now, it wouldn’t. I’d probably try to apply as a paramedic to be eligible.

**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:

**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.)?

P: I’d check my eligibility. So I have my eligibility already? Yeah. [started going through form]. It just looks like a regular va application. It’s not like ebenefits. That’s the best part. It’s not as difficult as ebenefits used to be.

A: let’s say you’re post9/11

P: it’s really easy. It’s not like anything that…[arrived at stem summary page] oh [went back to previous page when he saw he wasn’t eligible]

A: so here, let’s say you have about 7 months of benefits remaining

P: ok, it says I wouldn’t be able to if I have 7 months remaining. It doesn’t really explain. It would be a lot easier if it had more details about the scholarship itself. The qualifications or the amounts that it has.

A: would you expect to get that information in the application or would you expect to have had that information before you even started to apply?

P: I’d look at the information prior to applying because I wouldn’t want to waste time to know that I couldn’t.

A: can you talk to me about where it says your responses, where it has the x’s and the checkboxes. Can you talk to me about that?

P: I would still [?] it needs some exclamation. Do you have under your benefits? If you have over your benefits, then you need more time. It would need more clarification on the other page. It would need to say, do you have 6 months remaining to apply before you even start the application.

A: if you were Sammy at this point and you’re using your post 9/11 benefits, and you have 7 months remaining, what would you do at this screen?

P: I’d still apply, just to see what happens.

A: you want to keep going, then?

P: [selected yes to would still apply q] [filled in degree/school details]

A: where you’re going to school, does your school use your social security number as your school id?

P: no, I have a different number

A: do you use your school email address?

P: I forward it to my regular email

A: do you ever have to log into the system to see it?

P: no

A: alright, if you want to continue. And if you click these, they’ll fill in automatically.

P: [contact details] [opted for email contact method]

A: just one second. When you’re going through the bank information. I have a question for you on that. Do you think that inputting that information for the bank, what are your thoughts on whether your info would impact other payments you get from the va?

P: I don’t think it does. When I was getting bah, that was going to a dfiferent bank account than my regular benefits.

A: so you’ve had money coming from the va and going to different accounts?

P: yeah

A: and that worked out pretty well?

P: yeah

A: ok, you want to click those and fill them out?

P: alright.

A: alright, and then…

P: [submitted form]

A: [conf. page] ok, and if we landed here, what would your next steps be?

P: I’d print out…I’d take a screenshot actually, and just save it in case I need it in the future.

A: what do you think happens next?

P: normally the va takes forever to process

A: do you have any ideas on how you’d check on the status of your application?

P: I’m sure it’d be the same way, check under benefits or just call the va folks.

C: q about daughter majoring in stem using parent’s ch33 benefit and being eligible for stem scholarship

P: [he seemed to think that she’d be able to use the benefit. Amy checked on stem page and saw it was for veterans]

**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!