**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: Currently using

A: which one

P: post 9/11

* What school are you attending / did you attend?

P: liberty university

* What did you / are you studying?

P: double major. Christian leadership, a b.s. and a b.s in business administration

1. Are you familiar with the Rogers STEM scholarship?

P: yes. It’s available for people who do not have a gi bill and they’re looking for a degree in one of the stem fields

* 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 first scroll down and then I would look at education [quick links] and what I also do is I would also go to the top and I would click here and go to education and training [nav menu]. What I would do, I know that it’s not a program, but what I would like is to see with education and training, here is the gi bill benefit. I would like to find another hyperlink there that tells me additional benefits or stem scholarsips. Down here on the bottom [nav menu beneath education benefits] down there, I’d probably be looking for a hyperlink [understands gi bill benefits is most important link]. I would probably go to about gi bill benefits because it doesn’t say anything about the stem scholarship. [clicked link] I’m not seeing anything right here about the stem scholarship.

A: what kind of words are you looking for there?

P: others or more resources or something they’d have on there. other benefits, additional benefits, more gi bill benefits that you’d pull off on. Like I said I’d probably fall down a rabbit hole going down this veterans technology education course thinking that could be it

A: well, that gives us a pretty good sense of where you think that might fit well. [took back control to switch to prototype]

**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 scroll down right there. the sign in, I would ignore that. See, here down there. determine eligibility. [started reading requirements bullets]. Ok, I see where it’s saying right there. I would look right down there to determine eligibility. That’s what I would do. That’s how I would figure out if I would qualify for it [looking at 3 list items].

A: do you think you’d be eligible?

P: no

a: do you think you’d be eligible in the future?

P: it depends on the definition of science. I am getting two science degrees. One is in business administration. The other is in Christian leadership. I might try to stretch them to see if they’d fit.

A: how would you figure out if they fit within what va thinks of as stem?

P: I would click on approved stem programs. I would look down or try something easier. Can I try a find? [tried a control search; command f]

A: are you on mac? It’s triggering something on my side I don’t typically use

P: [kept trying to control f] [searched for business] agricultural business, I’m not that. I’m not that. There’s not one, so I’m going to scroll through each one of these meetings. Let’s just say it’s a stretch for a general business degree to be considered a stem.

A: would you try to apply for stem? Or if it’s not on the list, I’m not going to try to apply?

P: no, I wouldn’t because I’m also afraid that somebody would come in and try to do some kind of audit, and when they do that audit, well, you got a business degree and now you’re trying to get a teaching certificate. But here’s something that bothers me. I hate the stem thing. Washing a dog is something I can get a scholarship for but it’s not something I can get for a teaching certification?

A: that is interesting. I haven’t heard of a 4 year degree for something like that

P: and taxidermist. Doing that doesn’t take much. I’ve known people that have quit high school and are now a taxidermist. If those types of things are getting degrees, and I can’t, I’d be a little upset.

A: in terms of the requirements, how easy or difficult do you think it was to find out what the requirements for the scholarship were?

P: for me, it was easy because I know where to look. For other people, maybe some kind of key to show them what the eligibility requirements are or maybe a hyperlink at the beginning of the page, that would be easier.

A: [had him return to the proto]

**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?

P: about a 3.

A: you had mentioned that it would be helpful to have a listing for the requirements.

P: I remember doing a study for usability a couple of months ago. I told them the requirements should be up here before I start the application. The first thing I do is I see the sign in option, which I know is the action of the page. But if I determine the eligibility for the application, and I’m not eligible, there would be no need to start the application. If I were in a hurry, I’d just start the application [without looking at requirements].

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: alright, and then I would go in here [ had signed in] I would just start. Ok, Sammy smith. Click continue. What benefits am I currently using? So I’m using the post 9/11 gi bill. And in this scenario, I am enrolled in a stem degree?

A: yeah, he’s studying chemistry.

P: and I have less than 6 months.

A: if you could go back for a second, I would love it if Sammy would approach it as if he had 7 months.

P: ok, so I got a little more than 6 months left. Alright, continue [at stem summary screen] so I’d still like to apply

A: what are you seeing here?

P: it says I haven’t used up my benefit. it’s telling me I can’t apply. I’d probably go back and just click no and just start over again [thinking it was a computer error]

A: [?]

P: [?] it’ll probably take about a month before I get some action in there, so i’d have 6 months by the time my case comes up for review. If I do get contacted, if someone reaches out, I’d just explain it to them, I’d do it a little bit early because by the time I reviewed it, I’d have less than 6 months remaining in my post 9/11 gi bill.

A: ok, and if you want to keep trucking

P: ok [started filling out school details page] I know a lot wouldn’t be as fast as I’m doing that.

A: for your student id at liberty, is that your social security number?

P: no, I have my own id.

A: do you know that number by heart?

P: no, I’d have to copy and paste it. I know the last 4 digits. I’d just copy and paste it.

A: what about your school email address? Do you use that often?

P: for school, yeah. Not for social. I use my own personal email account for any va stuff. If I needed my school address, I would just put it in there.

A: what do you think va wants this information for?

P: to make sure I’m a verified student in there. it would definitely behoove me to tell them where I’m going so they could check that I’m still actually enrolled in the school and I’m not blowing smoke up their butt. Just for verification.

A: alright. When you’re ready, click continue

P: ok. Are you currently active duty? I’ve captured that. I would do that anyways [tried clicking country field in contact page] I always try to click country anyways. [selected email and mobile phone]

A: what are your thoughts on what the va would do? Do you think they’d use both of those?

P: I hate to say that, but just with my experience with the va, it would probably end up being neither of them. I’d get them in the mail. Every term, I get a packet from va explaining my benefits. They print 10 pages for me. They don’t mean anything to me because I can get that information online. I always end up getting that in the mail.

A: we’ll make a note of that

P: it’s one of the frustrating things. I think I fall 3 days short of the whole semester for spring of 2020 so I’ve been trying to find ways to see how much time I have. I end up getting one of those packets [?]

A: for the mobile phone, do you expect that to be a phone call?

P: it would probably end up being mail. I hate to say that, but that’s what I’d end up getting.

A: alright, if you want you can click continue.

P: this one right here. I know this by heart. This wouldn’t be a problem for me. The only thing is if I’m already logged in to this va program, it should already have my information if I’m already using my gi bill benefit. I’d like to see if there’s already an existing direct deposit account set up with the va, and it could say, use this account and have all the numbers blocked out except the last 4. And I’d be able to reuse that account instead of having to enter that again [?]

A: do you use one account?

P: yes, for my va payments I do. I forget I still get paid by the deparment of the army

A: do you think if you put in a different number here, do you think that would have an impact on where those other payments went?

P: I hope not, but knowing how archaic the data system is, I wouldn’t be sureprised.

A: does anything here indicate whether it would or it wouldn’t have an impact on that?

P: no.

A: ok. When you’’re ready, if you want to click continue

P: alright [went to review screen]. Do you want me to give you the honest thing of what I would do? [clicked checkbox and was ready to submit app], but just for this one, I’ll review [started opening tabs]. Alright, and everything looks right, and I would just hit submit application. Would you like me to do that?

A: yes please

P: so this is where I said 7 months. I submit the application and it gives me 30 days. That would basically be it. I would probably click “what happens after I apply?” and give it a quick gloss over

A: would you print a screenshot?

P: no, I’m too lazy to do it.

A: if you haven’t heard from them in 30 days, what would you do?

P: that phone number right there ( gi bill #) I’d call them up

A: do you use that number often?

P: no, I don’t use it often, but I’ve used it.

A: [?]

P: easy. [thought it was easy to apply] if that other one was in [direct deposit pre-filled] I’d say it was very easy

**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:

**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.

C: [asked about any parts he thought were unnecessary in form] [?] [he knew how many remaining benefits he had left as he had checked yesterday. Has personally experienced downtimes with the system]

J: [asked about the approved programs list and if he thought it was a comprehensive list]

P: [was wondering if he’d be able to get a teaching certification]

A: [explained he needed a stem undergrad degree]

P: that would frustrate me. You have someone like me that would like to do a teaching certification. I have two degrees that could fall into many areas. [?] I could use a teaching degree for dog washing. Yeah.

A: it would be really interesting to see what the 4 year degrees are for pet grooming.

P: that I can see as a tactical thing

A: someone like that wouldn’t be eligible for the benefit because they haven’t gone through the program.

P: would I be able to use my stem scholarship after I’ve exhausted my stem degree. I have a community college across the street. If I wanted to do welding, would I be able to do local certifications with my community college with this?

A: [shared the scholarship link with him] the page we were looking at is for someone who has done some research. You came in cold and you still had some knowledge… this has more detail. This is kind of that page where we were talking about, where would you go to find out more information about this scholarship? This is more, who’s eligible? So that’ll give you some more information and see if that’s an option for you.

**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!