**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, I have.

A: which benefits are you using

P: post 9/11 to pay for classes

A: are you using it right now or are you done?

P: I am using it between semesters. Now that I’m working I’m about to start using it up

* What school are you attending / did you attend?

P: University of florida tampa campus

* What did you / are you studying?

P: Information technology

1. Are you familiar with the Rogers STEM scholarship?

P: I am not

* 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: first, I’d scroll down to education and then it looks like none of those options are there, so I’d scroll down further. Education and training [hub link]. And then scroll down and see if there’s anything about scholarships there. other education assistance programs looks like something that might cover it. [went to page] what was the name of the program again?

A: edith nourse rogers stem scholarship is the full name

P: so, if I don’t find it here, then I might just click on education and career counseling to see if there’s options there to take me to [clicked left nav link].

A: what kind of words are you hoping to see?

P: I’m hoping there’s something like educational options, something that covers scholarships, grants, something like that. There’s nothing like that that I can see. If there’s something in educational counseling, I’m hoping I could talk to someone that might help me with that.

A: ok

P: so, I’m not findin git there. I guess go back and do a direct search for scholarships. [went back to homepage, searched for “scholarship”] that looks like it’s a general scholarships thing [clicked scholarships and grants page] [on edu hub page, was looking under “more information and resources section”

A: are you looking for anything that says scholarshps and grants?

P: I’m looking for anything that doesn’t say gi bill specifically

**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 still have benefits left, so that part wouldn’t apply to me. I’m enrolled in a stem program. I’m currently using post 9/11. So technically I wouldn’t apply since I haven’t used all my benefits

A: do you know how much you have left?

P: well over six months. Maybe a year or two. I just started using the benefit.

A: if you weren’t sure how much entitlement you had remaining, how would you check that?

P: I like the link here that says check remaining benefits. So I’d go there

A: what do you think would happen if you clicked on that link?

P: I would hope that it would take me to a page where I could see how much remaining benefits I have left.

A: do you want to give that a click?

P: [went to remaining benefits link]

A: what are your thoughts on that you have to sign in to check your remaining benefits left?

P: it makes sense that I have to sign in [?]

A: excellent. We’re not going to have you login to test that. [had him switch 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?

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’d scroll down and make sure under the prepare that I have all of that information. now when I was ready, making sure I had all that stuff, my ssn, information about my stem degree…then I’d click on apply.

A: I saw that you went through to sign in. do you think that you would normally do that?  
P: I would sign in, yeah. I would hope that it would prepopulate some of my information

A: if you want to go ahead and sign in, for sure. And this is prototype so you can click on any of them to get through.

P: alright [signed in]. so it says what I was reading there. [clicked apply button] [started filing out form].

A: Sammy is also receiving post 9/11 gi bill benefits.

P: you said he was in Chicago? We’ve used it all?

A: let’s say that he has about 7 months left.

P: [got to stem summary screen] so that would have happened to me. I wouldn’t have been eligible because I have more than 6 months

A: what would you do at this point?

P: I would explore other education benefits.

A: would you click right on that link?

P: the other thing here is you said I had more than 6 months, right? I’d still apply depending on how close I am. Does that make sense?

A: yeah. Talk to me about where that line might be

P: I guess if I’d just signed up for classes and I hadn’t completed them, by the time I finished, I’d be right at that 6 month point. By the time I finished, I’d be eligible for this.

A: you feel there is some wiggle room?

P: right. I don’t know how long the application process would take. By the time I completed the last of my classwork, I’d be now eligible

A: is there a line where if it was more than this, I would abandon? Can you ballpark where that amount would be, no I’m not going to apply now?

P: just really depends on the specific amount on the amount of time I have left vs the number of hours I’m using in these classes. I’m not sure how to answer that.

A: it’s a hard one. There are a lot of factors. It’s pretty hypothetical

P: if I was taking a full time load, then it’d be minimal for that

A: let’s say Sammy was pretty close. Let’s say it was 6 months and 5 days, so Sammy decided to go ahead with the application.

P: ok [said yes to would still apply]

A: [on school page] what would you put for the name of the stem degree?

P: I would put information technology.

A: ok, cool. And then before you click continue? So a couple of questions on this. Is your school id the same as your ssn?

P: it is not.

A: do you know it by heart?

P: I do not

A: do you use your school email address often?

P: about 50%.

A: how often are you checking that/  
P: about daily when I’m in school

A: ok, that’s all the questions I had for that. You may continue

P: [military active duty] my answer would be no since I’m retired. Continue or did you have more questions?

A: yes. Would you normally put a home number in there? [contact details] yeah, just in case. What are your thoughts on how va would contact you if they had questions?

P: preferably email unless it was something that needed to be answered immediately

A: do you think they might prioritize one or the other?

P: in my experience, they kind of prioritize it unless it’s emails and I haven’t responded to an email [had selected email and mobile phone]

A: ok. Do you have va payments that are going to other accounts presently? [on dd page]

P: yeah all my va money goes into my checking

A: do you think this might have an impact on your other va payments?

P: not really. [got to review page; looked through all accordions] [clicked privacy policy] I’d usually go through the privacy policy real quick but I won’t do that right now.

A: what do you look for in there?

P: all kinds of information they’d share, email, phone number, information act. Things like that.

A: if everything looks good, hit submit. Alright. What would you do when you got to this page?

P: I would look for the confirmation page to make sure I have that information [?]

A: what did you think of the process?

P: it was relatively easy [mentioned issues with the initial search for the stem scholarship]

**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?

P: no, most of it was pretty straightforward. It seemed pretty straightforward

A: any parts you would need assistance with?

P: not me personally, no. it seemed pretty straightforward.

A: if you use your back button on your keyboard and go back to the page that says you’re not eligible, and get your thoughts on that. [took him back to the page] can you talk a little bit about what this means to you and how you would interpret this?

P: this looks like the post gi bill scholarship that you’d apply if you’re towards the end of your degree and you just have a little bit to finish for your degree program.

A: in terms of letting people know, hey you qualify or don’t qualify, how does this strike you?

P: it seems pretty effective. The first time I saw it, it was pretty clear that, unless you’re almost at the end you wouldn’t be eligible. It does say it applies to undergraduate programs. Does this apply to graduate programs?

a: it doesn’t apply. What they’re finding is that it takes people, generally, longer to get through stem programs, so they want to make sure they are able to finish their undergraduate degrees for this program [?]

P: ok. Makes sense

* 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?

P: the actual application process was very easy. [rated it a 5] The process of getting to the application was more difficult. It wasn’t easy to find on the education page. It wasn’t advertised. Finding scholarships was not easy. Unless it was somewhere else or on social media, I wouldn’t know where to find it.

A: [?]

P: the 3 criteria were pretty straightforward. I didn’t notice that it was for undergraduate or for those pursuing a teaching certification initially [until he saw it at the stem summary page].

A: [went to the stem info page] [mentioned that the stem page will move to the va education and training benefits page/hub]

**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.

J: [asked about school id/email and how va would use it]

P: [expected it to be used for verification purposes]

C: do you know off the top of your head how many remaining credits you have left to complete your information technology degree?

P: basically 2 semesters. About 12 credits. [would be able to get this information fairly easily]

C: how would you expect to learn about the STEM scholarship? [had mentioned social media and VA newsletters].

**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!