**Moderator logistics before the session:**

* *Mute your Microsoft Teams\* notifications*
  + *\*Our team is ready to accommodate whatever platform Perigean uses*
* *Send out the* [*observer instructions*](https://github.com/department-of-veterans-affairs/va.gov-team/blob/master/platform/research/during-research/howto-observer-instructions.md) *to your observers*
* *In the Attendees section, make sure everyone except the participant is on mute.*
* *Check your [screensharing setup] and share permissions for participants.*

**Usability Testing Prep:**

* *Confirm that the participant has consented to the study before starting the session*
* *Have InVision link ready for sharing in the meeting chat*
  + *Check that guests can access and navigate through the prototype*

## **Intro - 5 minutes**

Thank you for joining us today! My name is [NAME] and I also have some team members on the line observing and taking notes. We’re working with the VA to improve the digital GI Bill experience for all users. Today we're going to ask you to complete a series of tasks that will simulate the experience of applying for GI Bill benefits.

Before we start, a few things I want to mention:

* **This entire session should take about 45 minutes to one hour.** I want to be sure not to keep you much longer, so I may occasionally move you along to the next question or topic.
* **You'll be interacting with a prototype.** his is a tool that may not function exactly the way you would expect a normal website to function. Some areas of the prototype will be clickable, and some will not. Since it's a protype, none of your actions will affect your actual VA information or benefits. When using the prototype, please pause before navigating the page in case there are initial questions.
* **Remember, you are the expert.** In this session, we want to hear your honest opinions. We are not testing your ability and there are no right or wrong answers. Your input will help us understand the educational benefit needs for GI Bill students, and we welcome your feedback.
* **On the consent form you acknowledged that you were comfortable with us recording this session**. **Are you still okay with this?** The recording will be used for reference in case we miss any notes. It will be deleted once our analysis is complete.
  + If yes: **Once I start recording, I am going to confirm that you are ok with me recording this session once more.**

*Start recording.*

* **I have started recording**. I'd like to confirm: Are you comfortable if I record my screen and the audio as we talk today?
* **If for any reason and at any time you want to stop the session, please let me know.**

**Say: *Now, let’s begin!***

**To kick us off, we wanted to start with a few warm-up questions (5 mins):**

1. What is your overall experience with the VA?
2. What is your history of applying for education benefits?
3. When was the last time you used your benefits?
4. What is your comfort level with technology?

1. Very uncomfortable, 2. Uncomfortable, 3. Neutral 4. Comfortable 5. Very comfortable

## **First Task: [Start Your GI Bill Application] – 5 minutes**

* **Impressions**
  + What are your first impressions of the page?
    - What do you like?
    - What is good about it?
  + Are there any other parts of this page that you notice?
  + Why do you think this information is needed?
  + Is there anything missing or confusing on this page?
* **Set a Scenario**

### o Imagine you’ve just gotten out of service, and you want to go back to school using the GI Bill. You’ll need to sign-in to start your application. You’re on the VA Education website and click on the Sign-In button, and then login using your ID.me credentials. Once you’ve logged in, you are at this page, which takes you here.

### o Without clicking on anything, talk through how you would start your application?

### o What do you expect to see next?

### o What would make this page easier to navigate or understand?

### After talking out loud, they can move through the prototype

### **Things to watch for**

* If users understand the purpose of the page
* If they notice the Start Application button

## **Second Task: [Review Beneficiary Info] - 5 minutes**

* **Impressions**
  + What are your first impressions of the page?
    - What do you like?
    - What is good about it?
  + Are there any other parts of this page that you notice?
  + Why do you think this information is needed?
  + Is there anything missing or confusing on this page?
* **Set a Scenario**
  + **Happy Path:** Imagine you’re reviewing the application and you see that your personal information is correct, how would you proceed through the application?
    - Without clicking on anything, talk through how you would proceed
    - What do you expect to see next?
    - What would make this page easier to navigate or understand
    - *After talking out loud, move through the prototype*
  + **Sad Path:** Imagine you’re reviewing the information on the application, and you see your date of birth is incorrect, how would you fix it?
    - Without clicking on anything, talk through how you would fix your date of birth.
    - What do you expect to see next?
    - What would make this page easier to navigate or understand
    - *After talking out loud, move through the prototype*
* **Things to watch for**
  + If users understand the purpose of the page
  + If users notice the Continue button
  + The order in which users understand and navigate the page
  + If they understand how to edit their personal information

## **Third Task: [Review Service History] - 5 minutes**

* **Impressions**
  + What are your first impressions of the page?
    - What do you like?
    - What is good about it?
  + Are there any other parts of this page that you notice?
  + Why do you think this information is needed?
  + Is there anything missing or confusing on this page?
* **Set a Scenario**
  + **Happy Path:** You’re continuing to review the application and you see that your service history already listed.
    1. How would you see more details of your service history?
    2. Where would you go if you have questions about your service history?
    3. If you needed to pause your progress and resume later, how would you do that?
    4. Once you’ve reviewed that your service history is correct, how would you proceed through the application?
       - Without clicking on anything, talk through how you would proceed
       - What do you expect to see next?
       - What would make this page easier to navigate or understand
       - If you needed to pause your progress and resume later, how would you do that?
       - *After talking out loud, move through the prototype*
  + **Sad Path:** You’re continuing to review the information on the application, and you see there is a discrepancy in your service history where the dates of your Navy service is incorrect.
    - Without clicking on anything, talk through what you would do
    - What do you expect to see next?
    - What would make this page easier to navigate or understand
    - *After talking out loud, move through the prototype*
* **What to watch for**
  + If users understand the purpose of the page
  + If users notice the Continue button
  + The order in which users understand and navigate the page
  + If they understand how to edit their personal information

**Fourth Task: [Service Information Considerations] - 5 minutes**

## **Impressions**

* + What are your first impressions of the page?
    - What do you like?
    - What is good about it?
  + Are there any other parts of this page that you notice?
  + Why do you think this information is needed?
  + Is there anything missing or confusing on this page?
  + Do you understand the questions being displayed?
* **Set a Scenario**
  + **Happy Path:** You’re continuing to review the application and you see that more details regarding service history information listed. Once you’ve reviewed your additional service history information and you agree that all information is correct, how would you proceed through the application?
    - * Without clicking on anything, talk through how you would proceed
      * What do you expect to see next?
      * What would make this page easier to navigate or understand
      * *After talking out loud, move through the prototype*
  + **Sad Path:** You’re continuing to review the information on the application, and you see there is a discrepancy in your service details. You are listed on active duty, even though you retired from service five years ago. What would you do?
    - Without clicking on anything, talk through what you would do
    - What do you expect to see next?
    - What would make this page easier to navigate or understand
    - *After talking out loud, move through the prototype*
* **What to watch for**
  + If users understand the purpose of the page
  + If users notice the Continue button
  + The order in which users understand and navigate the page
  + If they understand how to edit their personal information

**Fifth Task: [Select Benefit] - 5 minutes**

* **Impressions**
  + What are your first impressions of the page?
    - What do you like?
    - What is good about it?
  + Are there any other parts of this page that you notice?
  + Why do you think this information is needed?
  + Is there anything missing or confusing on this page?
  + Do you understand how the benefits are being displayed?
  + Where would you go if you have questions about education benefits?
* **Set a Scenario**
  + You’ve just finished reviewing your service history and want to select the benefit you want to use. You will also need to give up another benefit you are eligible for. How would you do this?
    - Do you understand why you need to give up a benefit?
    - Do the options make sense to you?
    - Do the program names resonate with you?
    - Without clicking on anything, talk through how you would proceed
    - What do you expect to see next?
    - What would make this page easier to navigate or understand
    - *After talking out loud, move through the prototype*
* **What to watch for**
  + If users understand the purpose of the page
  + If users notice the Continue button
  + The order in which users understand and navigate the page
  + If they understand how to edit their personal information

**Sixth Task: [Review and Submit] - 5 minutes**

* **Impressions**
  + What are your first impressions of the page?
    - What do you like about it?
    - What is good about it?
  + Are there any other parts of this page that you notice?
  + Why do you think this information is needed?
  + Is there anything missing or confusing on this page?
* **Set a Scenario**
  + You’ve finished completing the sections of the application and are reviewing the information.
    1. How would you see the details of the section?
    2. Where would you go if you needed to update anything on your application?
    3. How would you submit your application?
       - Without clicking on anything, talk through how you would proceed
       - What do you expect to see next?
       - What would make this page easier to navigate or understand
       - *After talking out loud, move through the prototype*
* **What to watch for**
  + If users understand the purpose of the page
  + The order in which users understand and navigate the page
  + If users notice the Submit Application button

**Seventh Task:** **[Download your COE] – 5 minutes**

*Option 1 – with COE*

* **Impressions**
  + What are your first impressions of the page?
    - What do you like about it?
    - What is good about it?
  + Are there any other parts of this page that you notice?
  + Is there anything missing or confusing on this page?
* **Set a Scenario**
  + You’ve submitted your application and it has been approved and you’ve received your Certificate of Eligibility. How would you download it?
    - Without clicking on anything, talk through how you would proceed
    - What do you expect to see next?
    - What would make this page easier to navigate or understand
    - *After talking out loud, move through the prototype*
  + On the COE:
    - What are your first impressions of the letter?
    - How do you understand the information?
    - Is there anything missing or confusing?
* **What to watch for**
  + If users understand the purpose of the page
  + If they notice the Download COE button
  + The order in which users understand and navigate the page
  + If they understand in the information displayed on the COE

***(Eighth Task****) Option 2 – without COE*

* **Impressions**
  + What are your first impressions of the page?
    - What do you like about it?
    - What is good about it?
  + Are there any other parts of this page that you notice?
  + Is there anything missing or confusing on this page?
* **Set a Scenario**
  + You’ve submitted your application and it has been approved and you’ve received your Certificate of Eligibility. How would you review it?
    - Without clicking on anything, talk through how you would proceed
    - What do you expect to see next?
    - What would make this page easier to navigate or understand
    - *After talking out loud, move through the prototype*
* **What to watch for**
  + If users understand the purpose of the page
  + If they notice the Download COE button
  + The order in which users understand and navigate the page

**Ninth Task: [Download your Denial Letter] – 5 minutes**

* **Impressions**
  + What are your first impressions of the page?
    - What do you like about it?
    - What is good about it?
  + Are there any other parts of this page that you notice?
  + Is there anything missing or confusing on this page?
* **Set a Scenario**
  + You’ve submitted your application and it has been denied and you’ve received your Denial letter. How would you review it?
    - Without clicking on anything, talk through how you would proceed
    - What do you expect to see next?
    - What would make this page easier to navigate or understand
    - *After talking out loud, move through the prototype*
  + On the Denial Letter:
    - What are your first impressions of the letter?
    - How do you understand the information?
    - Is there anything missing or confusing?
* **What to watch for**
  + If users understand the purpose of the page
  + If they notice the Download Disallowance button
  + The order in which users understand and navigate the page
  + If they understand in the information displayed on the Denial Letter

## **Tenth Task: [Your Application Needs Further Review - Navigate to your Dashboard] - 5 minutes**

* **Impressions**
  + What are your first impressions of the page?
    - What do you like about it?
    - What is good about it?
  + Are there any other parts of this page that you notice?
  + Is there anything missing or confusing on this page?
* **Set a Scenario**
  + After submitting your application, you see that it requires further review. You want to go back to your dashboard. How would you go to that page?
    - Without clicking on anything, talk through each component that you notice and what they mean to you
    - What do you expect to see next?
    - What would make this page easier to navigate or understand
    - *After talking out loud, complete the prototype*
* **What to watch for**
  + If users understand the purpose of the page
  + If they understand how to navigate through dashboard
  + The order in which users understand and navigate the page

## **Post-Task Interview – 5 minutes**

* What did you think of the session today?
  + What worked well?
  + What could we improve on in future sessions?
* Do you have additional questions?

## **Thank-You and Closing – 5 minutes**

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 develop the site and make sure it works for Veterans.

Thanks! Lastly, would you be willing to participate in future user feedback sessions and/or do you know any other Veterans, caregivers, or service members who might be willing to participate?

*If Yes:* Thank you! I’ll have our team send you a follow-up email for you to send us their contact information.

Great, well thank you so much again, and enjoy the rest of your day!