**Moderator logistics before the session:**

* *Mute other computer notifications*
* *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**

Good [morning/afternoon], may I ask what name you prefer to go by? Well, thank you for joining us today, [NAME]. My name is [NAME] and I also have some team members on the line to observe and take notes. We’re working with the U.S. Department of Veterans Affairs Education Service to improve the GI Bill experience for all users. Today we're going to ask you to complete a series of tasks that will simulate a secure inbox and notification center within your VA account.

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

1. **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.
2. **You'll be interacting with a prototype.** This 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. And, since it's a prototype, none of your actions will affect your actual VA information or benefits.
3. **Remember, you are the expert, here.** 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 communication preferences for GI Bill students, and we welcome your feedback.
4. **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.

*Start recording.*

* **I have started recording**. Can you confirm that you are okay with me recording this session?
* **If for any reason you want to stop the session or take a break at any point, please let me know. If there are no questions or comments at this time we can jump right in!**

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

1. Would you like to tell us about your overall experience with VA?
2. What is your history of applying for VA education benefits?
3. When was the last time you used your VA education benefits?

So now let’s click that [LINK] that you can find in the chat. It will take you to the prototype. The password is: **[PASSWORD]**. I’m going to ask you to share your screen if possible, so please let me know if you need any assistance with that. …

*(Backup Plan – HCD facilitator may need to share their screen to scroll/click for the participant)*

## **1. Email Notifications from Va.gov (3 Potential Screens)**

* **Impressions: Before we do anything here, I would like to ask what you think about the screen in front of you. Feel free to scroll around but please do not click the links, yet.** 
  + Potential Probes (*use these questions to guide the discussion, not mandatory every time*)
    - What are your first impressions as you scroll through the page?
    - Are there any other parts of this page that stand out to you?
    - Is there anything missing or confusing on this page?
* **Now I’m going to ask you to complete a task: Based on the directions of this notification, how would you navigate to your secure inbox?**
  + *START CLOCK (or record time)*
  + Potential Probes
    - *If navigating quietly*, Can you please talk aloud your thought process for this task?
    - Is there anything that could make these screens easier to understand or navigate?
* **Task Succession Metrics**
  + The participant follows the shortest path to arrive to arrive to the secure inbox (code: “1ST TIME, SUCESS”; “TASK 1”)
    - The participant does not follow the shortest path to arrive to the secure inbox, but eventually arrived without assistance from the moderator (code: “SUCCESS W CONFUS”; “TASK 1”)
    - The participant does not follow the shortest path to arrive to the secure inbox and needs assistance (code: “DID NOT COMPLETE”;” TASK 1”)
  + Does the participant understand the purpose of the secure inbox center?
  + Does the participant understand the content of the email notification and directions to the secure inbox?

## **2. Find a New Message**

* **Impressions: Before we do anything here, I would like to ask what you think about the screens in front of you. Feel free to scroll around but please do not click the links, yet.** 
  + Potential Probes (*use these questions to guide the discussion, not mandatory every time*)
    - What are your first impressions as you scroll through the page?
    - Are there any other parts of this page that stand out to you?
    - Is there anything missing or confusing on this page?
* **Now I’m going to ask you to complete a task: Can you please find the new message from VA Education Services about your benefit eligibility application?**
  + *START CLOCK (or record time)*
  + Potential Probes
    - *If navigating quietly*, Can you please talk aloud your thought process for this task?
    - Is there anything that could make this task easier to understand or navigate?
* **Task Succession Metrics**
  + The participant follows the shortest path to arrive at the new message screen (code: “1ST TIME, SUCESS”; “TASK 2”)
    - The participant does not follow the shortest path to arrive at the new message screen, but eventually arrived without assistance from the moderator (code: “SUCCESS W CONFUS”; “TASK 2”)
    - The participant does not follow the shortest path to arrive at the new message screen and needs assistance (code: “DID NOT COMPLETE”;” TASK 2”)
  + Does the participant understand the purpose of the new message screen?
  + Does the participant understand the content of the new message screen?

## **3. Archive a Message**

**Task: (Once the new message has been located) If you wanted to delete the message from [Date], how would you do that?**

* + *START CLOCK (or record time)*
  + Potential Probes
    - *If navigating quietly*, Can you please talk aloud your thought process for this task?
    - Is there anything that could make this task easier to understand or navigate?
* **Task Succession Metrics**
  + The participant follows the shortest path to archive a message (code: “1ST TIME, SUCESS”; “TASK 3”)
    - The participant does not follow the shortest path to archive a message, but eventually arrived without assistance from the moderator (code: “SUCCESS W CONFUS”; “TASK 3”)
    - The participant does not follow the shortest path to archive a message and needs assistance (code: “DID NOT COMPLETE”;” TASK 3”)
  + Does the participant understand the purpose of archiving a message?

## **4. Reply to a Message**

* **Impressions: Before we do anything here, I would like to ask what you think about the screens in front of you. Feel free to scroll around but please do not click the links, yet.** 
  + Potential Probes (*use these questions to guide the discussion, not mandatory every time*)
    - What are your first impressions as you scroll through the page?
    - Are there any other parts of this page that stand out to you?
    - Is there anything missing or confusing on this page?
* **Task: Reply to the message from Edu Services that you just located. In your own words, please notify them that you would like to verify your benefit expiration date. When you’re finished, you can send the message.** 
  + *START CLOCK (or record time)*
  + Potential Probes
    - *If navigating quietly*, Can you please talk aloud your thought process for this task?
    - Is there anything that could make this task easier to understand or navigate?
* **Task Succession Metrics**
  + The participant follows the shortest path to reply to the new message screen (code: “1ST TIME, SUCESS”; “TASK 4”)
    - The participant does not follow the shortest path to reply to the new message screen, but eventually arrived without assistance from the moderator (code: “SUCCESS W CONFUS”; “TASK 4”)
    - The participant does not follow the shortest path to reply to the new message screen and needs assistance (code: “DID NOT COMPLETE”; “TASK 4”)
  + Does the participant understand the purpose of the reply message screen?
  + Does the participant understand the content of the reply message screen?

## **4. Create a New Message to Send**

## **Impressions: Before we do anything here, I would like to ask what you think about the screen in front of you. Feel free to scroll around but please do not click the links, yet.**

* + Potential Probes (*use these questions to guide the discussion, not mandatory every time*)
    - What are your first impressions as you scroll through the page?
    - Are there any other parts of this page that stand out to you?
    - Is there anything missing or confusing on this page?
* **Task: Next, I would like you to try to send a message to your School Certifying Official, asking them whether they have received your certificate of eligibility. You can use your own words when drafting the message.** 
  + *START CLOCK (or record time)*
  + Potential Probes
    - *If navigating quietly*, Can you please talk aloud your thought process for this task?
    - Is there anything that could make this task easier to understand or navigate?
* **Task Succession Metrics**
  + The participant follows the shortest path to compose the new message (code: “1ST TIME, SUCESS”; “TASK 4”)
    - The participant does not follow the shortest path to compose the new message screen, but eventually arrived without assistance from the moderator (code: “SUCCESS W CONFUS”; “TASK 4”)
    - The participant does not follow the shortest path to compose the new message and needs assistance (code: “DID NOT COMPLETE”; “TASK 4”)
  + Does the participant understand the purpose of the create a new message screen?
  + Does the participant understand how to navigate the create a new message screen?

## **5. Attach a File to your Message, Send to SCO**

## **Impressions: Before we do anything here, I would like to ask what you think about the screen in front of you. Feel free to scroll around but please do not click the links, yet.**

* + Potential Probes (*use these questions to guide the discussion, not mandatory every time*)
    - What are your first impressions as you scroll through the page?
    - Are there any other parts of this page that stand out to you?
    - Is there anything missing or confusing on this page?
* **Task: Before sending the message to your SCO, let’s pretend that you would like to attach the letter as a copy. How would you attach the file and send the message?** 
  + *START CLOCK (or record time)*
  + Potential Probes
    - *If navigating quietly*, Can you please talk aloud your thought process for this task?
    - Is there anything that could make this task easier to understand or navigate?
  + **If you wanted to save this response for later instead of sending it now, how would you do that?**
    - Is there anything that could make this task easier to understand or navigate?
* **Task Succession Metrics**
  + The participant follows the shortest path to attach the file and send the message (code: “1ST TIME, SUCESS”; “TASK 5”)
    - The participant does not follow the shortest path to attach the file and send the message, but eventually arrived without assistance from the moderator (code: “SUCCESS W CONFUS”; “TASK 5”)
    - The participant does not follow the shortest path to to attach the file and send the message and needs assistance (code: “DID NOT COMPLETE”; “TASK 5”)
  + Does the participant understand the purpose of the attach file feature?
  + Does the participant understand how to attach file feature?
  + Does the participant understand how to send the message?
  + Does the participant understand the save as draft feature?

## **6. Locate your Files and Download one**

* **Task: how would you get to your file storage screen** 
  + *START CLOCK (or record time)*
  + Potential Probes
    - *If navigating quietly*, Can you please talk aloud your thought process for this task?
    - Is there anything that could make this task easier to understand or navigate?

## **(when arrived at their file screen) Impressions: I would like to ask what you think about the screen in front of you. Feel free to scroll around but please do not click anything.**

* + Potential Probes (*use these questions to guide the discussion, not mandatory every time*)
    - What are your first impressions as you scroll through the page?
    - Are there any other parts of this page that stand out to you?
    - Is there anything missing or confusing on this page?
* **Task: How would you download a file if you wanted to?**
  + ***Note:*** *Talk aloud – no time metric*
  + What do you think about this process?
* **Task Succession Metrics**
  + The participant follows the shortest path to reach the file screen and download (code: “1ST TIME, SUCESS”; “TASK 6”)
    - The participant does not follow the shortest path to reach the file screen and download, but eventually arrived without assistance from the moderator (code: “SUCCESS W CONFUS”; “TASK 6”)
    - The participant does not follow the shortest path to reach the file screen and download - needs assistance (code: “DID NOT COMPLETE”; “TASK 6”)
  + Does the participant understand the purpose of the file storage page?
  + Does the participant under how to download a file?

## **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?
* Would you like to add a comment about your experience today that we can pass on to future potential participants?

## **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