**Estimate Your Benefits Usability Testing Discussion Guide - Desktop Assistive Tech**

**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 GI Bill Comparison Tool. Specifically, we're looking at how to calculate your GI Bill benefits for institutions and programs within the Comparison Tool.

Before we get started, a few things I want to mention:

* This entire session should take about 50 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.

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?

**Setting up Screen reader & Sharing**

For our next step, I'd like you to share your screen and screen reader audio with me.

In Zoom, can you select the Share button?

On this screen, let's go with the default selection.

Also, there is a checkbox in the Share Screen option that says "Share computer sound." This will let us hear your screen reader. Can you make sure that it's checked and select "Share"?

\*Confirm that the screen reader is audible. \*Confirm that screensharing works. If it doesn't work immediately, suggest they restart the screen reader (order of operations isn't typically isn't critical)

[DYZAL – his screen magnifier.] “It’s probably one of the better ones I’ve seen.” [It is a physical object that he can move around, not computer software.]

**Checklist for Screen Reader Participants**

* Are you using a computer or mobile phone during our session today? Mac or Windows? iOS or Android?
* What browser are you using today?
* Are you using a screen magnifier today? Yes
* Do you have the latest version of Zoom (4.3.1) installed? Check under Zoom > About.
* Which screen reader are you using today?
* Are you wearing headphones today? If so, would it be possible for you to take them off and use your computer or mobile audio? I'm asking so that I can hear your screen reader during the session.
* Would you mind setting your screen reader to its default speed? We want to accurately hear and record what you’re experiencing on VA.gov.
* Do you know your screen reader's verbosity setting? High, medium, low? Is that your standard setting (or do you tend to change it depending on what you're working with)?

**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: I have used and will use them here in a little bit. I used the majority of them 2011 to 2015 to secure a master’s degree and several certifications. I will be using what’s left over for ph.d work.

* (If applicable) When did you start school? Where are you going to school?

P: University of southern California [?]

1. How did you (or would you) find out what benefits VA provides for your education and housing?

[Used housing benefits before, then education benefits]. Marine corps decided that I retired too early to use that benefit for my daughter, so that happened. I wasn’t too happy about it. I told my boss, who said I should use my benefit to pay for my degree. I said I didn’t need taxpayers to pay my school. He said they give you a housing benefit too. I told him I didn’t want taxpayers to be paying my mortgage. He said, Rob, you are so stupid. You can pocket the money and use it for your daughter’s degree. [he ended up using the benefits]…keep pressure on the va and others. When funding goes away, the money goes away, so don’t break the contracts…Very generous benefits. Very awesome experience on the education side. I can’t say enough about them.

1. Have you ever used the GI Bill Comparison Tool before?

P: I have, I’ve used that. When I came in, it was the 80s, 82, which was the veep. You paid a couple of bucks and the va paid into that. It wasn’t even worth it. They transformed veep into the Montgomery bill. When the post-9/11 was signed, you had to do it again. You had to do certain elections.

* If yes, fantastic!
  + When do you think the last time you used it was?
  + What were you looking for?

P: I think the first thing you’re trying to make sure you’re getting the best coverage for the time period you’re looking for. It becomes two phased-I need to know the amount of money and the time phrase for which I’m operating…the example I give is on the post-9/11 gi bill. If you fail a course or don’t complete a course, you’re going to pay the va back without a tuition rate. That is a comparison item that needs to go. Not that anyone means to fail. Whem my wife found that out, she said, you need to get upstairs and go study. It’s a balance, but there’s just so much detail in some of these programs, which, quite frankly, unless it’s some sort of ai, it’s not conceivable to build one.

* + Do you recall how you first learned about it?
  + If no, no worries. We're checking that out today and always appreciate getting a fresh perspective on it.

Okay. Now I'd like you to open a new browser window or tab.

I have a website I want you to visit - I can send you the link via chat in Zoom or I can spell out the Url - which would you prefer?

* Fill in link here

**First Task: Calculate Benefits at School / IHL - 15 minutes**

You are considering attending **UNIVERSITY OF CALIFORNIA-BERKELEY** for data science and want to know what costs (including tuition, fees, etc.) are covered under the Post 9/11 GI Bill. How would you use the Comparison Tool to find out what benefits you would receive if attending University of California-Berkeley?

*Potential prompt:* Let's say you were interested in taking classes at this school remotely, how would you go about incorporating that information?

P: Knowing me, I’d probably already have tried to find out all the programs and costs for the school I wanted to attend before I came to this school. you’re already ahead of me. I should have just come straight here. I’m going to assume that I don’t have to do any pre-work, any type of having the other school website open. So I gotta drill straight into here, the dropdowns. What’s your military status? I tend to go through all the options. Obviously veteran works. So you’re already prepopulating all the ones I’d choose, but I’m a little ocd. I’m predominantly post-9/11, so I’m a chapter 33. Ok, so this is a little bit much, but I wouldn’t have thought purple heart service is in there. that’s a little bit of a surprise. Obviously my 36 months is what I’m predominantly going to look at. Type of institutions, schools, ok. How do you want to take them? I’ll take a look at both. Can I try calstate Berkeley?

A: yeah, see what happens?

P: [had no luck with typing calstate Berkeley] I guess I’m messing up. I don’t see Berkeley. Did I misunderstand you?

A: no

P: ok. As soon as Bakersfield popped up, I should have see…is it no longer calstate university? [tried berk] ok, now I’m frustrated.

A: we know we have an issue on this particular search. We’re looking for the university of California Berkeley.

P: oh, yeah. I was doing California state university. I’m sorry. I thought it was calstate.

A: we’re trying to work through this [search issues] but that’s not what we’re here for today! [reminded him of task]

P: [opened profile] looks like I got the right school. that seemed intuitive. I’m going to back up for a second if that’s ok. [went back to search] What are you asking me here on the left? Ok, that seems to be more search. I don’t know why I’d have warnings or school closures, but there’s probably a good reason for that. This portion of the screen, I wouldn’t even scroll to. I would have gone straight to the school, let me see the view details.

[profile] 518 students there, that’s neat to know. Link, that’s helpful. I’m assuming what I see on the right is based on what I clicked in. if I had changed something, [went to your benefits and looked at military status dropdown and cumulative]

A: were you expecting something to happen there?

P: yeah, I was hoping to see a recalculation. Wow, I didn’t realize they were getting that kind of money. Wow. Ok. Did you use your post 9/11 for tuition for a term that started before…ok, so I clicked that. Hmm, I didn’t see it change on that. Now I’m curious what the qualifier here was for, so now I’m going to go learn more [501 modal] hmm, interesting, ok. Good to know.

A: you mentioned that you didn’t see any change happening?

P: yeah. Ok, I see it. Very good. [had switched length of service] I thought, if I expand this out, it will tell me what the following year will be, right? I thought if I’m only getting 50%... I figured x amount of dollars will only give me tuition and fees… I guess I would expect that to go to zero is what I’m saying. If I’m only going to get half the money for someone that only went for 36 months, I would assume that I’d only get half for that amount of matriculation. [had clicked the T&F learn more in benefits panel] hmm, ok. [went back to profile] so, I think I’d want to see per term like a standard traditional 4 year framework. If I was going to calstate for 2 years, I’d expect to see it for 2.5 years. You get what I’m saying?

[IDEA: Two options, add update button within each each instead of calculate button at bottom or move benefits panel to the bottom].

Oh, I didn’t see that part there, learning format and schedule [opened it]

A: what do you think is going to be in there?

[?]

P: if I was doing a master’s degree, how would I change it? Is there a means to change this?

A: how do you think you’d do that?

P: I guess “about your school”. I got my master’s degree at boston university. It was every other weekend for 2.5 years. It was a great program. Yeah, you got me on that one, I’d have to stare at this for a while.

A: yeah, there’s not a direct line to do this. It would be part of the kicker bonus. Are you familiar?

P: yeah, a little bit.

A: excuse me, the yellow ribbon

P: ah, there you go. I see what you’re doing. [played around with control, hit calculate button] I didn’t see where it adjusted. Maybe highlight it red or have the old number next to it.

A: up on the right hand side, there’s a section, the gi bill pays to school. there was a change there. do you see what it is? It’s pretty subtle.

P: oh, I see it. Yeah, I’m the type I don’t catch subtle changes well. That could have been highlighted in a different color, like in a green change. I would have immediately seen it.

A: that was really helpful.

Veterans education assistance program. You kicked in, I want to say 1 dollar and you got 1 dollar from the federal government. I was a young lieutenant when I did it. By the time I was a captain, I’d maxed out. I think I had 5,000. I know the 80s were cheaper, but it wasn’t going to help you get a college education. The post-9/11 gi bill is much more generous than that.

Things to watch for:

* How does the user select the school (School name or View Details)?
* Where does the user initially look for their benefit information?
* How often and after what actions are users viewing “Estimate your benefits” panel to track changes there?

Accordions

* Does the user engage with the accordions without prompting?
* Which accordions does the user open?
* When making changes to inputs located in several accordions, do users go back and check previous accordions to see if changes are holding?

Calculate button

* Do users click calculate for every accordion or just once after all changes are made?
* When users click Calculate, do they notice which values have changed?
* When do users expect re-calculations to occur (as they are making them or after clicking Calculate)?
* Assistive: How well can users navigate the EYB section using assistive devices?
* Assistive: Are there any parts of the interface that the user struggles with (e.g. accessing any inputs, movement of the focus, opening accordions, etc.)?
* Assistive: What do users think of the process of making selections and recalculatingWhat are user thoughts on the bottom sheet (e.g. helpful, obstructive, indifferent)?

Upon completion of task:

* How did you think that went?
* On a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task?

I wouldn’t put you on the extremes of the scale. I think it was easy, but there were things I had trouble with. I think it’s doable. It’s fine. [gave it 4]…one of the reasons why I got my degree through boston university because the woman who was there at the admin shop took care of all the paperwork for the va. That was a big selling point, like, hey, you got somebody here who’s helping with all of that. That really helped…when it comes to, perhaps most of us, we have an idea of the school we’d like to go to, but unless I’m going for a specific program or a specific state, I’d probably be open to what’s available.

* Were you able to find what you were looking for? Did it seem like anything was missing?
* Do you have any questions about the benefits you would receive at this school?

Accordions: Let's take a look at the Estimate Your Benefits part of the page.

* What did you think of the accordions (Your benefits, Learning format and schedule, Scholarships and other funding)?
* What did you think of how the questions were grouped together?
* When you were clicking through the accordions, what did you think about how they opened and closed?

**Second Task: OJT or VET TEC - 10 minutes**

OJT - A friend of yours told you that **RAGING WIRE DATA CENTER in Sacramento, CA** does on-the-job training for veterans in data science. Can you find that data center and let me know what benefits you would receive if you trained with this employer?

VET TEC - A friend of yours told you that **GALVANIZE INC** is a VET TEC training provider with a program in San Francisco, CA for data science. Can you find that provider and let me know what benefits you would receive if you took this program?

Things to watch for:

* How does the user navigate to this program/employer?
* What, if any, fields do they change within the EYB section?
* How often and after what actions are users viewing “Estimate your benefits” panel to track changes there?

Upon completion of task:

* How did you think that went?
* What did you think of this information versus University of California?
* Were you able to find what you were looking for? Was anything missing?
* Do you have any questions about the benefits you would receive at this school?
* 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 - 5 minutes**

* Do you have general thoughts or feedback on the Comparison Tool 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: could you talk about the veep program?

J: could you describe your screen magnifier?

**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!