**Estimate Your Benefits Usability Testing Discussion Guide - Standard Desktop**

**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?

**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’ve been using the Post-9/11 GI Bill for the past 4 years at two different institutions.

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

I just finished the semester at George Washington University.

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

P: I think I ended up just googling it and looking for blog posts on other sites that had information about it. IT was fairly difficult to get precise information from the VA.

A: when you say precise, what was it that you were looking for?

P: It was difficult to get information based on the housing stipend based on the location of the university that I was confident in. I wasn’t sure if it was where you lived or where the school is located. I eventually figured out that it was based on the school’s location, and not your house.

A: Do you recall where you found the information?

P: I don’t recall.

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

P: I don’t think I have.

P: Before we begin, I have one addition to my previous comment. It wasn’t until I got my housing benefit that I figured it out…It was very difficult to find information about that in general.

A: where did you study?

P: I was at the free University of Berlin.

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

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.

**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: That’s very convenient because I did consider going to Berkeley for engineering a while back. [started looking at landing page fields ] How do you want to take classes? In person. I guess I will search for UC…sorry, I had my keyboard settings messed up. [searched for school]

[srp] Ok, so may be eligible for…housing. That’s significant! [clicked on view details]

[profile] So, looks like gi bill pays tuition. I’m responsible for nothing out of pocket…book stipend. The housing allowance is larger than anything I’ve ever seen before. [he had scrolled down and first read the last question in first mini accordion ] Are you an in-state student? I’m going to say no. [seems he was expecting benefits panel to change]

A: did you notice anything change when you did that?

P: I’m going to say no. [kept trying to calculate benefits but didn’t hit calculate button.] oh, I guess I had’nt hit the calculate benefits button. [went back to look at previous accordions] I guess that stayed the same. I’m going to select Yes for Yellow Ribbon. I

A: are you familiar with yellow ribbon?

P: Yes, but I guess it’s not available for undergraduates at Berkeley. Went back to first accordion] I guess I’m getting a little confused whether I’ve updated to in-state or out of state because it hasn’t returned the out of pocket tuition to being zero. I may have misinterpreted what the benefits were for out of state students. [went back to tweaking fields] Oh, I guess there is a difference between in-state and out of state students.

P: Ok, one student complaint [started scrolling down page]. That’s not a lot. Ok, it looks like, as an out of state student, I’d be responsible for a significant amount of tuition. The housing allowance would be the same, the book stipend would be the same. It would be a significant amount for the out of state tuition.

A: do you think you have a good handle on the benefits?

P: Yes.

A: how do you think that went, generally?

P: I think in general, it was very easy and very straightforward. I’m not sure if I misspelled UC Berkeley at first. It may not have popped up when I typed in uc Berkeley. If I did misspell it, it’s not the program’s fault. Other than that, it seemed pretty straightforward. I was expecting it to update automatically as I changed my benefits. I think that’s partially over the lag with the screensharing, not necessarily because of the layout, though.

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)?

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?

P: I would give it a 4.5. It was fairly straightforward, other than the Berkeley thing.

A: did it feel like anything was missing?

P: I think in terms of what the va offers, I don’t think so. I am curious on UC Berkeley’s limits on the Yellow Ribbon program, but that’s something I’d have to go to UC Berkeley for. I’m assuming they have pretty firm limits on the money they give out for the program. Just because I’m now more responsible, as an out of state student, for the tuition, using the yellow ribbon would be useful.

A: do you know why that is?

P: Each school decides how much they give out for yellow ribbon. I assume UC Berkeley only gives it to graduates since the option is not available.

A: what if you got a scholarship from your local rotary club? How would you factor that into your equation?

P: I would just enter the amount [put it in scholarships field and hit calculate button].

* 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.

A: thoughts on area?

P: Your benefits makes sense to me. I was at first not sure what about your school meant. I would have had to open it up to figure out what that meant. So I guess I can edit the amount of in state tuition and fees per year, or the tuition per year, but I’m not sure under what circumstances I’d need to modify that. Going to their website and figuring out a different tuition, I’m not sure I would necessarily need to do that. Otherwise, that makes sense I can tell that this is how I choose the options for the school.

A: what did you think would be there before you opened it?

P: I’m honestly not sure.

A: is there a different name you think might make sense?

P: I’m having trouble coming up with something that’s reasonably descriptive. The school option is not super helpful.

A: let’s look at some others and that can percolate in the back of your mind.

P: learning format and schedule makes sense. That’s reasonable. I guess, going into this, I’d probably already know what classes Berkeley offers for their data science degree. So that’s pretty straightforward. Scholarships and other funding, I don’t know what the kicker bonus is. Does that link work?

A: yeah, sure.

P: [read kicker modal] ok, interesting. So that would tell me I’m not eligible if I didn’t know about it already. And the option to enter scholarships. That’s for me to enter any additional calculations for what the va is going to give me, but that’s helpful. Yeah, otherwise, it mostly makes sense.

* What did you think of the accordions (Your benefits, Learning format and schedule, Scholarships and other funding)?

[think this area needs to present Q’s sequentially, not have all accordions at once]

* 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: Ivy League school - 10 minutes**

You know that the Post 9/11 GI Bill covers Ivy League schools like Brown University, Harvard, Yale, Dartmouth, Princeton. Let's say you wanted to know what costs would be covered at one of those schools. Pick an Ivy League school of your choice and see what benefits you would receive at that institution.

Things to watch for:

* How often and after what actions are users viewing “Estimate your benefits” panel to track changes there?

Upon completion of the task:

* How do the benefits at this school compare to what you'd get at UNIVERSITY OF CALIFORNIA-BERKELEY?

**Third 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?

P: ok. [landing page] so same status, same benefits. Wait, you said it was raging wire data center? I’m actually not sure if it’s an employer or a training provider. [was toggling those two institution types]

A: what do you think the difference is?

P: the va may not provide as much benefits for one or the other. It seems like the vet tec training provider has some sort of relationship with the va that maybe there’s extra benefits for working through that. Let’s see [opened and read modal] ok, interesting. It looks like training pipelines, probably an apprenticeship style program. Let’s see what is in there. [clicked search] ok.

[srp] [typed in sacramento, didn’t see it in search, went back to landing page to search for employers]. [found it in search, clicked view details]

P: got a housing allowance and a book stipend. I guess there’s no tuition because it’s on the job training. [kept going back and forth through all the mini accordions] so overall, $2100 a month for housing, $83 a month for book stipend. It looks like the program is only 24 months and the housing allowance goes down every 6 months. I don’t know much about the on the job programs. Does that also mean my salary goes up? So that seems fairly straightforward.

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/Ivy League school?

P: it’s consistent. It looks very similar, so it’s very easy for me to compare what I’d be getting. I remember the housing allowance for uc berkely was 3400. So this is expected. The book stipend ends up being 83 a month. That seems like more than uc berkely, but now that I think about it, uc Berkley gave it per year and this is per month, so it’s a little difficult to compare them directly. Maybe they come out being the same thing. 83x12 is close to a thousand, but I’m not sure if it’s the same.

* 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?

P: I don’t think so. I don’t know much about on the job training programs. I guess a question I have is what my salary is going to be or whether we get a salary at all to figure out when my housing allowance goes down, how is that going to change my total monthly income over the course of two years. Going from 2100 to 840 a month is significant. In sacramento, 840 is not enough to cover housing.

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

P: I’d say it’s probably about the same, 4.5 or even a 5. The trouble I had finding it was because I didn’t know what type of organization it was. Being able to go to its website, I would have been able to find it a lot faster. Maybe the fact that I was able to choose the type of organization it was made it more confusing. If I would have been able to type it out instead of knowing whether it’s an employer or vet tec would have been easier.

A: so anticipating on that main page, just giving a general search that was all the providers together?

P: so I guess the radio button, it seems like it restricts your search to a particular type of institution. If I don’t know what type of institution something is, I don’t know what type to choose…so for people that don’t know what it is, it might be useful to search the whole database without having to filter beforehand.

A: ok, that’s good input.

**Fourth Task: Benefits Change - 5 minutes (Optional)**

You recently found out that you are eligible for the **Vocational Rehabilitation & Employment** GI Bill. You are curious how your benefits with this bill would compare to the Post 9/11 GI Bill. How would you go about changing your GI Bill selection within the Comparison Tool?

Things to watch for:

* Where do users try to change their benefit?
* Do users realize they can change “Your benefits” values on Search Results page?

Upon completion of task:

* 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?

P: …if there was some way to directly compare benefits across schools, that might be useful for people.

A: do you want to take a second to search for university of berlin?

P: I’m not sure if that will show up. The va was paying money to them because it was a partnership program. Let’s see [searched in landing page for free berlin university berlin] [searched for berlin instead]

[srp] oh there it is. Now that I think about it, I may have gotten a lower housing amount.

* I want to give a chanced to the other people on the line to ask a question.

C: you mentioned the University of Berlin. Was that one of the two institutions you mentioned you used chapter 33 with? How did your housing benefit work out with a foreign school?

P: George Mason was one the two institutions. I think I got the standard international rate for housing at Berlin.

C: Initially when you were adjusting the questions for uc Berkeley, you mentioned you thought the amounts on the right would update. Can you tell me about your thought process there?

P: I thought there might have been some screen lag, so I assumed that the amounts would update automatically, but then I saw the calculate button below.

J: sister schools…?

P: [would be helpful for comparing benefits.]

**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!