**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: Yeah I actually just exhausted the entirety of my 9/11 benefits for grad school here in Washington, dc. I finished up in may of 2019.

A: congratulations. What was your degree in?

P: public policy… I always tell people that the gi bill got me the rest of my undergrad degree and all of my graduate degree, so…It made a huge difference in my life. Amazing, amazing, benefit. I always tell veterans to fully exhaust the benefit.

A: did you get a head start on graduate courses?

P: I started my degree in 2007, then the financial collapse happened. I was well prepared for my classes. My parents were naval officers…much like many students are doing now, I waited it out, and started school in 2013, 2014….that’s my full background. I took a few classes before I got out, tuition assistance is what it was.

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

1. How did you (or would you) find out what benefits VA provides for your education and housing?
2. Have you ever used the GI Bill Comparison Tool before?

P: I think I have. I’d have to look at it to figure it out.

* 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.

A: this is the comparison tool. Does this look familiar to you?

P: it looks like other VA sites… I don’t remember looking at this specifically.

**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: right, so just looking at this page, I’d just systematically go through the tabs, make sure I’m a veteran. I want the post-9/11 gi bill so I’d make sure that’s selected. I’m glad they have that list because there’s so many benefits and so many versions of the gi bill throughout the year…type of institution, instead of school, I might say institutes of higher learning. Schools can mean other types of training programs. I like in person classes, but I might just for option availability click that one [in person only] and then int’s in Berkeley [typed in ber, seemed to expect suggestive search, didn’t see it] so let’s do university of California. That should bring up the u-cal schools. Ok, u-cal Berkeley. So then this would bring me to another search page. This tells me the tuition, which is 100% in-state. housing allowance, which is significant. And then the book stipend. The only other detail I’d want to know is, but I guess since it’s 100% in-state, you wouldn’t have a need for yellow ribbon program. [clicked view details], but I guess if I was going on a fact-finding mission, it would be nice if I could save this and compare it to another university…

[IDEAL: BRING UP SCHOOL COMPARISON FEATURE AGAIN]

P: What’s your next question?

A: let’s say you received $3000 from your local rotary club. How would you calculate that?

P: I guess I would go to the scholarships and other funding tab, but I’d want to know if that could be funded out of pocket. I guess I’d go to the scholarships and funding. Will you be a yellow ribbon recipient? I guess yes. I don’t know, that’s a good question. I’d probably call the VA and say, I have this additional scholarship provided to me. How does that factor in with my benefits? I’d click on this thing, has school of business, and I guess the va matches the $10,000. I might also contact the school, I guess. I’d contact the school, probably starting with their veterans group, GW.

A: what kind of thing, in terms of that scholarship question, what kind of thing would you be looking for?

P: so, you mean if va estimated including that in my benefits? I’d probably go back to this [scholarships accordion] since I’m not seeing other…[read down the accordion] I don’t know what the kicker bonus is. I guess I’d put it here, scholarships excluding pell grant. But if this is a small private scholarship… I’d probably put it here. [typed in 3,000.00 then changed to 3,000] I guess the decimal function doesn’t work. [went to read right benefits] I guess it puts it here…you know, it’s good for the va. Some scholarships help you pay for things other than tuition, so I would consider 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)?

Upon completion of task:

* How did you think that went?

P: I think it went well. I’m a person that likes talking to someone, so I would just air, if I don’t find something immediately, I’d probably contact the va and figure it out. Maybe some sort of tagline that says, scholarships or other funding from any source, something to kind of highlight that area... It just didn’t seem as direct. I really appreciate having this breakdown, your housing allowance, the stipend. And the division or school, having that is really important to me.

A: you quickly selected yellow ribbon for that one. I’m curious what your thinking was for that one?

P: I was thinking of Berkeley as being a private institution for some reason. I know the gi bill pays an entirety of a tuition, maybe it’s up to a certain amount. I’d want to make sure the gi bill pays for the entire amount. I’m inclined to think about the yellow ribbon consideration.

A: as you’re looking through this left-hand side of the page, what do you think might be in there, under About your school?

P: I would think it would be information about demographics, basic historical information, size of student body, graduation rate, 5 year salary outside school…should I research this a little more?

A: no, I’m just curious…what about the learning format? What do you think might be int here?

P: …I guess it’s not going to give you any specific schedule information. if you’re applying to a specific school, maybe it could give you semester start times.

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

P: 3

* 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: 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: [went to search for vet tec program on landing page] […] some say immersive, some say something else. I guess I’d click this one [the one in sacramento] [clicked view details] ok, what was the, was there a follow up question?

A: yeah, you want to find the provider and the benefits you’d receive for the program.

P: so you’d go down here to estimate your benefits [benefits panel] ok, so that lets me know that you’d have to be employed following completion of the program which is a very good incentive following the tech school. so do you still want me to enter a scholarship amount?

A: id you’d like. The rotary club really wants you.

P: [entered 3,000 into scholarships field then clicked calculate] I think that would cover the entirety. Man, san Francisco, 4,368 dollars. That is insane. So yeah, that’s all the information I’d want to see. I’d want to know, if I wasn’t starting at a zero balance, what would happen during that last semester if my benefits expired before the program did. I’m sure that’s very specific, but it applies to a lot of veterans. I guess there’s other programs down here? [scrolled down] oh, this is great, application process. Contact details…having a lot of names available to begin my inquiry process and set up a campus visit, that’s great that they have all of that information there…this seems really comprehensive. I don’t remember if I saw the zero balance line on the other one, but that’s good to see in very black and white terms. I’m sure the tuition and fees is broken out for the other one. That’s good to see. I guess, choose the training program, this is good to see if it would vary. I don’t know if these are different training programs within the same university, but that’s really good. It’s very helpful. I don’t know if it’s more helpful than the other one, but it’s at least equally as helpful.

A: what is your assumption about who’s offering those training programs?

P: to me, this could be one of two things: training programs within the same technical university or comparison program. I really don’t know, if I’m taking data science, these are similar. [scrolled up] the following training programs are approved for vet tec. I don’t know. Vet tec is a va thing. I guess vet tec is a group of schools you could utilize your benefits with. I would be wary of, since I don’t know the tuition and fees, I would contact the va [tbd]. I don’t know much more. I’d probably go to the learn more part, that would probably be helpful [additional resources]

A: we’re doing this really out of order and having you look for a specific thing, whereas someone else might be looking more generally.

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?
* 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?

P: I’d say a 4.

A: [asked about rating for uc Berkeley]

P: since I was conditioned less, I’d say a 3…with this one, I had to keep in mind the city. It looks like they operate a lot of these in different cities. Maybe having the state or city italicized or set off in a different way would be helpful.

A: Generally, when we’re looking at this vet tec page, so vet tec is a funding stream or a funding program that’s available to folks who have the post-9/11 gi bill, and you could have one day of benefit remaining, and you could appy for vet tec. You could take classes like general assembly style courses where you go in for like 8 weeks and learn some technology and it doesn’t use up your benefits. It is a benefit, but it doesn’t use up your benefits… it sounded like all those pieces weren’t coming together for you

P: yeah, if I was more familiar with it, it would make more sense… here it says, the following programs are approved for vet tec. It makes it seem like the programs are a subset of vet tec.

A: what do you think the green check mark does?

P: I think it means I selected data science… and maybe it would change if i selected something else [tried radio buttons, didn’t click calculate] maybe since I’m on the data science immersive page. [seemed to expect the selected program to change in the table by changing the radio button].

**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?

P: No, not really. If promoted enough, I’d definitely utilize something like this. It gives a lot of the information I’d be looking for in one place. I must have gone to something back in the day. It seemed to be a giant table. It didn’t seem to have this degree of information.

* Any questions for me?
* I want to give a chanced to the other people on the line to ask a question.

**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!