**Estimate Your Benefits Usability Testing Discussion Guide - Mobile**

**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**

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

In Zoom, can you select the Share button?

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

\*Confirm that screensharing works.

**Checklist for Participants**

* Are you using a mobile phone during our session today? iOS or Android?

P: iphone

* What browser are you using 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 used it last semester. I think that was my last little bit of GI Bill benefits.

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

P: 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 just went to the GI Bill website and just made sure that it was covered, and covered in full since it’s a private university, and then just going to the GW website asking them the questions in their center.

A: so you checked out the gi bill website and crossreferenced that aginst the school?

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

P: I might have. I’m pretty sure I did when I was getting my master’s degree. I’m in a ph.d program so I first used the gi bill when I was getting my master’s program.

* 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?

P: probably on the gi bill website.

* + 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?

* If link via chat - open Zoom, click the 3 dots on the bottom right of your screen. Click Chat to access.
* If spelled out, [**https://bit.ly/2xARJgI**](https://bit.ly/2xARJgI)

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.

Since we are testing on mobile, we can't see what you are tapping on the screen, so if you could tell us what you are tapping, that would be very helpful.

**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: ok, so the first question is what’s your military status. I know I’m a veteran but I’d probably click on it just to make sure that’s the best option. I always like to make sure I’m not choosing the wrong answer. The cumulative post 9/11 active duty service. So I’d click on the options to make sure what they are. And then I’m 36 months at 100%. What does basic mean? [clicked on learn more] I’m just curious about the basic, includes basic. It’s so hard to remember what you signed up for at the beginning of military stuff. I was right on the cusp where you could do the Montgomery gi bill and the post-9/11…I’m always trying to remember what I actually qualified for.I would need to enter the city school. you said university of California Berkeley? [she searched and pulled it up right away]. Oh, look. I love it when the option pops up.

[srp] so I see it says 100% in state and then you get housing, 3500, books, 1000. I’m going to click on the view details because I’m curious, what if I’m out of state. what is that pop up? Gi bill…sorry, the pop up at the bottom says…[?]

A: how would you find out the costs for in state vs. out of state?

P: I would go to the school website…I guess there’s a contact button at the bottom of the page.

A: how would you find out the actual dollar amount for whether it’s in state or out of state?

P: I would go to the university of California website.[?]

A: when you were on the previous page, you clicked through to view details. What kind of view details were you anticipating would be on the page where you landed?

P: I was thinking it would be more information about my benefits, not necessarily of the school. I don’t really know what I was expecting. [went back to srp] let’s see, view details. [went back to profile] I think I was expecting more information about what benefits I’d be getting by going to that school. if I’m going to that school, I probably know a little bit about what Berkeley is.

A: what are you looking at?

P: I’m looking at the options. I’m looking to see what happens if I click on no to in-state student [clicked modal for Q]. and I’m just clicking on the tuition and fees per year. Probably looking at learning format and schedule, scholarships and other funding. This one’s talking about are you yellow ribbon. That probably helps if you’re out of state or private school tuition. If I was an out of state student, I’d be curious about the yellow ribbon. So I’d just click through most things and see, what does this say?

A: some people say they’re curious, but they go right to the interface. You really are!

P: yeah, especially this thing. You want to make sure you can do it. Is your program covered by the gi bill? I don’t want to pay much out of pocket. That was one of the things for me going back to school. can I afford it?

A: did you use yellow ribbon for your graduate studies?

P: I did not. My tuition fell under the amount that was covered, but my school is a yellow ribbon participant, so I didn’t need to use it. I knew it was there. [scrolled down] oh, they have veteran programs at the bottom. If you scroll down, there’s complaints. There’s more information at the bottom. Certifying officials, now I’m just looking at the additional information that’s at the bottom because it’s there. [clicked on the student complaints link] oh, it just talks about the student complaints.

A: let’s say you were getting a scholarship from your local rotary club. I would probably click on this, scholarships and other funding, and I would plug in 3000. Then it says calculate benefits. So that just reduces the out of pocket tuition.

A: what’s your out of pocket going to be now?

P: I guess about 20,000. It was 19000 before. Man, this school is so expensive. I don’t remember if this was the in-state.

A: do you remember where that was?

P: [went to about your school] oh, there you go. If I’m in-state, it’s $0. Look at that. It’s benefitted if you’re in-state tuition. So I’m just looking at the benefits per term amounts.

A: talk to me about what you’re seeing there.

P: I’m just looking at the tuition and fees. I was thinking why it’s different for fall and spring. And then housing allowance is 15,000, which they talked about up here. That’s like 5 months housing, looks like. And then I’m just looking at the book stipend. When I got this, it wasn’t clear that you got this as a prorated amount towards the semester that you’re in. that’s all I’m looking at.

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)?
* Mobile: Do users expand and collapse the bottom sheet? If so, how?

Upon completion of task:

* How did you think that went?

P: to get to this page from the va webpage? I think that was fine. I think we were on the previous page, and I know I wanted to go to university of California and it popped up all the different campuses. That was pretty easy.

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

P:

* 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)?

P: this little pop up thing at the bottom, it doesn’t seem to stay and it takes me a minute to get it up. It’s taking a while to get it there. I think that could be better. I almost want to see this pop up information instead of changing the status. I think the wording is weird. I’m just trying to think [?] and then about your school. this makes more sense because it tells you about your school. are you an in-state student? And then it plugs in the school calendar. scholarships and other funding, this section, the radio buttons make sense. It wasn’t as clear to me that that’s what you’re doing there to calculate your out of pocket. I think that could be more clear. I didn’t see what my out of pocket was until you had me plug in the scholarship. I almost wonder if you bolded here’s what the va has to pay. Here’s what you have to pay if you get a scholarship.

* 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?

Mobile:

* Mobile: What did you think of the sticky pop-up/bottom sheet displayed within the EYB section?

P: When I first clicked on your benefits, it pops up, but it doesn’t stay up, and sometimes it seems to come up right away. If that flashed out right away, I would be frustrated. It’s almost more annoying than anything else. I’m annoyed that I can’t get it back up. That’s just annoying, like what is that? Why can’t I get it back up? If your estimated benefits is down there, it doesn’t seem necessary to get that to pop up.

* Mobile: What did you think of the values shown in the sticky pop-up/bottom sheet (collapsed and expanded)?
* Mobile: When do you think those numbers should update? (as you make selections or after clicking Calculate)
* Mobile: When do you think that pop-up/sheet should appear? When should it disappear?
* Mobile: What do users think of the size of the expanded sheet (e.g. too big, too small)?

**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?

P: [selected vet tec and went to search] [on srp, typed in san Francisco] so when I did that, it still pops up on the los angeles one. I see galvanize, but I don’t see the san Francisco one [she filtered additionally] data science, hack reacktor. Ok, so I see that now I can see the program I’m looking for. Do you want me to click on one of those?

A: you are looking for data science

P: so I would click on the title. So I would just start looking through the things. Ok, so it’s an approved program, 480 hours, and 17,000. Estimate your benefits. Use the fields to calculate your benefits. I’ve chosen the data science, tuition and fees. I don’t have scholarships, so it calculates it at… the va pays it at 25% and then upon employment. And then the out of pocket tuition is $0. I think one thing I’m curious about is that payment schedule if that’s normal for the program. I’m going to click learn more. Oh, that’s how they pay [had read the modal for va pays to provider] oh, it doesn’t count against your gi bill entitlement. I’m going to remember that. I would be like, oh, this looks good. $0. [kept scrolling down] how do I apply? And then you get to choose your provider, and then just other information. and then I’d click on the application just to see what they’d require. Do you want me to do that?

A: that’s ok.

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?

P: I think that was great. Like here it tells you that the out of pocket tuition is bolded in that line. It tells you the tuition and fees, out of pocket tuition, and then I get a housing allowance. I could do this without needing to do a job. [?]

A: what do you think that green check mark is for?

P: I have no idea. if I start to rationalize it, why is galvanize approved and the other ones are not approved?

A: you said you couldn’t click on them

P: on the names, there’s not a way to change. In my head, when I think about a checkmark, sometimes it’s a selection, versus being approved. If I click on that, it’s not a selection. It’s just that the checkmark has some other meaning that I don’t know [IDEA: HAVE YOUR PROGRAM SECTION FOR PROGRAM SELECTED AND A SEPARATE PROGRAM SECTION FOR THE OTHER ONES]

[?] [Was able to select a different program and calculate benefits that way] I see TBD. I would be curious about what’s going on. I’d contact galvanize to see what that’s about. I might call va, but I would probably get a quicker response from the school, and if they didn’t have an answer, then I’d wait for the va to answer.

A: asked about task score for uc Berkeley.

P: that was easier. I give it a 5. It was harder on this one, using the city and state. it was nice that the options popped up.

* 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?

Mobile:

* Mobile: What did you think of the sticky pop-up/bottom sheet displayed within the EYB section?
* Mobile: What did you think of the values shown in the sticky pop-up/bottom sheet (collapsed and expanded)?
* Mobile: When do you think those numbers should update? (as you make selections or after clicking Calculate)
* Mobile: When do you think that pop-up/sheet should appear? When should it disappear?

[mentioned it may not be needed since you get down to the eyb panel pretty quickly]

* Mobile: What do users think of the size of the expanded sheet (e.g. too big, too small)?

[mentioned it didn’t have as much information as the full benefits panel] [This should provide more value for users].

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

[she was most interested in what va covers and her out of pocket]

[learned about the comparison tool on her own]

**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!