**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 8 or older

* 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: Yes. My semester at George Washington ended on may 12. So technically as of right now, I’m not. I’ve been using it for two years.

* (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 VA is finally good about communicating via email, so there’s not 2 or 3 days that go by when I don’t receive communications from va. Quick background, before I left active duty, I transferred all of my benefits to children that are now of college age. They’re not using the benefit, so here we are 6 years and I am incrementally transferring the benefits back to myself. Only those two children, the benefit can only be shared among the 3 of us. Since I‘ve gotten married and had another child, the benefit can’t be transferred to them. I do that online through the va portal.

A: that sounds exciting

P: I typically get a counselor online… I do typically back up my actions with a call to the counselor. The letter comes in the mail after a month of my action.

A: are you talking to a person at the school or with the va?

P: with the va. I make that call twice a year, maybe 3 times a year, so infrequently.

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

P: vaguely. I believe that is where a veteran would have options between the Montgomery and the 9/11, right?

A: yeah.

P: [?] I haven’t ventured out to compare my benefits to something else. I do believe it’s the superior benefits to my specific 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?
  + 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?

[amy had to share her screen and he directed her actions as he was unable to share his mobile screen]

P: so far, the first 3 things I see, the default would work. The schools is also checked. I would check to see if the schools would appear. I would enter university of California-berkeley, California. I used to live in California. I would enter Berkeley, but I don’t think it would pop up. And there we are! [srp] from there, I’m trying to determine the tuition, that’s what I’m trying to achieve?

A: yes

P: so I’d scroll down to see what else might be an option. I can see the scroll down. Ok, here we are. Is the tuition 100% in-state? I guess I’d view details to see what else is available.

A: so click that?

P: yes, please. This seems to be for undergraduates given that it’s a 4 year program. what am I trying to see?

A: you are looking to see at what benefits you’d receive

P: …also, the 3500 a month for the housing allowance. Besides those 3 core benefits, I’m not sure what else I’d expect to get out of the website besides those 3 major pieces. [?] I’d look for chapter 33 with yellow ribbon to see what that amount would be. If I’m going to Berkeley, I think we need to back out of that now. [had amy go back to srp] oh, wait a minute. I see yellow ribbon [had amy check the checkbox] so, post 9/11 chapter 33, can we get that toggle and see if yellow ribbon is among those, and it appears not to be… I’d have to rely to see… can we see what’s available under 36 months? Ok, I’m disappointed that…maybe we can do view details [went back to profile] scroll down further and see where the yellow ribbon has been captured. I don’t see that it has been captured yet. [had amy scroll down the page] ok, housing allowance [ in benefits panel ] I still don’t see that choice for if I’m out of state. maybe we can expand that option for yellow ribbon. [had amy check under your benefits for the gi bill dropdown] at this point, I’d probably make a phone call. There’s a way to google how generous Berkeley would be with their match. I wouldn’t be satisfied that the site has helped me with how generous the yellow ribbon program is.

A: I’m going to close out of this, which gi bill benefit you want to use

P: maybe it’s “about your school”. maybe that would show us your out of state match possibility. Oh, there it is. Are you an in-state student? No. so tuition and fees per year, 35000 and maybe we can learn more there [T&F learn more] ok, so we can close that there. we can scroll down further. If we scroll all the way down, there’s still room to go. The fact that it’s out of state…can we go back up? Your benefits. So the post 9/11, can we see if the yellow ribbon now appears? It does not. Ok. Yeah, probably make the phone call. Or if I’ve already downloaded it. [managed to ask amy to open scholarshps and other funding] ok, yellow ribbon, there it is right there. so 10,000 x2 would be 20k. so can we go back up? I apologize. Can we go back down? So now we’re looking at basically 33,000. So I know I’d be out of pocket about 2,000 a year. What more would I want to know? I don’t know. I can see that my benefit would be 3500 and my total benefit would be 32,000.

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?
* On a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task?
* 2.5. I think if the toggle that had the chapter 33 also had the yellow ribbon, I’d bump it up. That’s what I’ve seen on other websites. In that option, chapter 33, with yrp is a toggle option so I expected to see that. It took me an extra 4 minutes to find. I don’t think I should have taken the extra time. The yellow ribbon is not an intuitive program. We found it under scholarships and other funding, and that seems to be a non-va, non-va choice. I wouldn’t intuitively look for yellow ribbon in that location. That’s why I gave it 2.5. I probably would have given it a 4, 4.5 if I had found it in another place.

A: let me ask you about the calculate benefits button. What do you think that’s about?

P: I assume that’s taking in inputs about the school and input I had provided. So when factoring in both sides of the equation, the fact that I’m in-state, exclusively chapter 33, and the other side of the equation, I assume the calculate benefits marries up those sets of inputs.

A: should I click on it?

P: yes, please. I see the yellow ribbon has appeared. I would not have expected it to appear automatically, but it does. Given my two years at gw, that looks familiar, but I’m not surprised by what I see there.

[?] I may not have choices. Student feedback all the way down. It’s clearly higher.

* 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?

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?
* 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?

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?

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

**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.

C: have you used the Yellow Ribbon Program yourself? How did you learn about it?

[he has used it since GW is very expensive. He thinks he learned about it through his school’s veterans office.]

**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!