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

**P2 – Stephen Haas**

**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?
   1. I just exhausted my 9/11 benefits

* (If applicable) When did you start school? Where are you going to school?
  + Master’s in Public Policy, certificate in….Got my undergraduate and all of grad degree. I really appreciate it. It made a huge benefit in my life. I wish it was utilized a little better for other people. I actually started my degree at Brown’s. My grades were average. My parents were career naval officers knowing my parents weren’t going to want to pay anything beyond an undergrad degree. Waited out the collapse. I took a few classes while I was in…but I used the tuition assistance.

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?
   1. I think so…maybe, I’d have to see it again to know.

* 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?

It looks like a standard VA site…I don’t remember having looked at this specifically.

I’d systematically go thorugh the tabs. Veteran . Post 9/11 GI Bill…I’m glad they have that listed because there have been so many versions of the Montgomery Bill over the years. Type of Institution…instead of Schools, I know for me I’d maybe say Institutes of Higher Learning…schools can be a bit broad, even though other options are her. Personally I’d want In prson , but I know online too.

Typed Berkeley…erased and typed university of California…htat should bring up UCal schools, clicked option. So then this tells me tuition, 100$ instate, housing, books…the only other info I would need….you wouldn’t have a need for Yellow Ribbon I don’t think. If I was going on a fact-finding mission…it would be nice if I could save this and compare it to another university. Scrolled down to Veteran programs…ok, so it has Yellow Ribbon. Yeah, it looks like this would fulfill all the benefit requirements I would have on my mind.

*Potential prompt:* Let’s say you received $3000 from your local Rotary Club to help fund your education. How would you go about factoring in that money?

If it was funding that I received myself, I’d click scholarships and other funding…but really, I’d want to know if that funding could be used out of pocket or if it had to go to the school. Will you be a Yell Ribbon? Yes…I don’t know. In this case, if my local rotary supplied $3000, I’d call the VA and say they had provided this money to me. That tells you about all the YR funding they have. And there’s the restriction on the number of students. Yeah, I don’t know where I would put in a personal scholarship. I’m trying to scroll the screen, but it’s being a little slow. Scrolling down to Student Feedback through Additional Information.

Clicked Your benefits…already done that. Opened Scholarships and funding, I’d probably go back to this, since I’m not seeing any other. I don’t know what the kicker bonus is. I guess I would put it here…scholarships (excluding Pell) and then I’d hit Calculate benefits. Decimal function didn’t work. Clicked Calculate benefits. I’m trying to see where they would have put that…oh there, under Tuition and Fees. You know, it’s good for the VA. Some scholarships help you pay for things other than tuition.

I think it went well. I’m a person that likes talking to someone. If I can’t find something immediately, I’d call someone. I’d just have more information, with small scholarships, you don’t know how it’s supposed to be reported. Maybe scholarships or funding from any source. Maybe a workflow schema…maybe, #1 insert your benefits, #2 find out about your school. Eventually I would have gotten there. I remember having some information available. I didn’t have this breakdown, but it’s really nice. The division or school that you’re applying to, that makes a difference. Having that specific information is really important to me. As far as user interface, it’s good, not the best, but pretty good.

I should have…with a state school, I would want to know that…the GI Bill pays the entirety up to a certain amount. I’d want to make sure that Yellow Ribbon pays for the gap. I’m just inclined to think about the Yellow Ribbon consideration.

School – information about demographics, historical graduation rate, salary rate post-school…opens it…oh no, hmmm…

Learning format – quarters, semesters, trimesters, rolling admission or scheduling. Well I guess it’s not going to get you any specific schedule information.

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? No
* Which accordions does the user open? Scholarships – only when prompted
* 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?
* 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** provides 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?

Went to VET TEC…it looks like this one, but I’d want to make sure that all of them came up. Typed Galvanize Data…I guess some say Immersive and some say something else. Scrolled through options until San Fran. Clicked name. Ok…so…what was the?

Go down here to see Estimate Your Benefits. Ok, so that lets me know that you have to be employed following completion of the program, which I think is a very good incentive. So am I sort of getting the $3000 scholarship? Put $3000 in to scholarships…so in this case the VA benefit would be 14980…which I think is the entirety…I think that would cover tuition and fees. I think that’s what I’m looking for. It’s only my monthly rate for in-person versus online.. $4000 versus $800 that’s insane. The one other thing I’d want to know what would happen if my benefits expired before the last semester. But yeah…oh this is great, Application Process, Contact Details…having lots of names available to begin my inquiry process and set up a campus visit is important to me. Yeah, that’s all the stuff I’d be looking for.

Maybe I just didn’t look through all the other stuff, but this looks comprehensive. I don’t remember if I saw the $0 balance line. I’m pretty sure the housing allowance was broken up on the other one. That’s good to see. Choose the training program…I don’t know if these are different programs within the same university or different programs for comparison. To me this could be different programs between the same university or different comparison programs. Hmmm…yeah, I don’t know. If I’m taking data science and this is similar. The following training programs are approved for VET TEC…so those are approved by VA. Yeah, so…I mean, I would be wary of not knowing tuition or fees. I guess I’d contact the VA. I assume these are technical schools for me to take…I’d probably go to the Learn More part about VET TEC.

A 3 for the other one. When I put in Berkeley, there were a lot of things that auto-populated. I would populate by the number of clicks.

With VET TEC, I have to keep in mind with the city. Maybe having the state and city italicized or set off.

I was not understanding VET TEC. If I wasn’t familiar, I would think these are 3 different programs/schools. It says the following programs are approved for VET TEC. Maybe for someone familiar with this, they would have understood this.

Green checkmark – it means that I’ve clicked on Galvanize, so it’s giving me information about that program versus similar programs. Maybe that would change if I clicked on something else. Changed radio button (didn’t click Calculate), but hmm…no. I don’t know. I don’t know.

I remember a giant table with a bunch of universities.

What values are important to you/looking at?

If Yellow Ribbon applied, big consideration. Whether it’s a business school or not. Things like housing allowance, out of pocket tuition, making sure housing is based on zip code of where you’re living or the university. Just to see how much you would be paying out of pocket.

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?

**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**

Those are all the tasks I have for you today.

* 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.

**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!