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

**P7 – Lisa Kinston**

**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. Yes

* (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?
   1. Yes

* If yes, fantastic!
  + When do you think the last time you used it was?
    - Recently – not because I changed schools, but I was short on getting paid.
  + 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?

I wonder if VET TEC is new. Obviously the in-person option is great.Typed Berkley…not sure I typed that right. Typed university of cali…and clicked right option. So I would click on name…And Boom shaklaka. Is there anything specific you want me to look for? From my understanding, you’re looking for this information (benefits panel). Out of pocket is 0, so they would pay for everything. I’d get #53500 for housing. To my knowledge, you’re asking for the information on the right side in this box.

*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?

Opened scholarships and other funding. Went to scholarships and entered 3000. Clicked Calculate benefits. I believe it’s here…yea, and that changes the breakdown…I don’t know , did it change benefits per term? I did see that its here..that’s really nice. I didn’t know that was a thing on the tool. I didn’t know you could add scholarships to it.

Opened military status…oh, that’s nice. Opened which GI Bill. I like the idea of having the chapter on the side. My school is constantly asking what chapter and I don’t’ remember. Opened Cumulative..oh, I really like this. I’ve been using this program for 5 years and yes, I’m still working on my Bachelor’s. I really like how you guys have the different percentages. That’s really awesome. Changed bill to Vocational and clicked Calculate benefits. Hmmmm…what the heck, housing allowance looks different. Housing allowance is so much lower. I’m not sure if that’s necessarily true. Book stipend…ok, I don’t know if that’s true either. No matter how much your books are they pay it. I don’t know if these things are true. I think I might be confused or freak out. I love the layout, I really do. It’s really easy to read with the bold. And the numbers on the side are great. I still think the housing allowance isn’t accurate compared to CH33. I just feel like it’s not accurate because it implies that they only pay for this amount, when they pay for all of your books.

Opened about your school. Are you an in-state student…with this, to my knowledge. I really do like this, because every school does it differently. I think you’re supposed to get in-state tuition. It looks like you can change books and supplies per year…I really like enrolled. For several years of my doing Voc, I wasn’t in a good place and was only doing like quarter time. I think the VA kind of hides it because I was doing ¼ time and getting full. Changed to ¼ and clicked Calculate. I’m looking at school year costs…so I don’t understand why it’s 12000 a year, because I’m taking one class. I didn’t think to look at housing…that is nothing. So I just thought everything would be changing. So I was thinking I have $3000 in scholarships…my thinking is if I have 36 months and can’t do full time – why would I use my GI Bill if I have a scholarship and I would use my scholarship and save my GI Bill. If I have my scholarship in there, it should be a dramatic difference.

Learning format and schedule. How do you want to take classes? I really love that because I’ve had conversations if I want to take one class in person and 2 classes in campus. So I’m a full time student (changed that), went to Learning format and change to in-person and online and clicked calculate. [Multiple accordion changes before clicking calculate]. So if I’m looking to take online and in-person. So I’m assuming the rule is that if I take at least one class in person then you get the larger rate. If that’s not the case, I’d be upset.

Where will you take the majority? Other location – I went to this community college to get my Associates degree and they had 4 or 5 locations in the area. It would be cool if they had a list of locations instead of putting in the zip code. I mean what if I’m new to the area and I just don’t know. It would just make things easier. I’m interested to see if there’s a comparison tool side-by-side…to figure out which location is best. That would be really nice.

Scholarships and other funding – Yellow Ribbon. I’ve never really understood that. Opened Learn more. I’m not going to read that. I like how you have the pop up screens and how you fade the rest out. I wonder if there’s a place though to add the Pell grant. I mean I get Pell grants, but it’s a very complicated process. So I go to a private university. I get scholarships from the school, I get them from the state of FL and Pell. It would be nice to be able to put my FAFSA stuff in. That’s super extra, but that would be cool.

I think it’s a really great transition. I’m such a visual person. Went back to SRP, I forgot about this page. Scrolling through filters. For people who are really looking for specific things, they can do that. I think about how a lot of older students who are using this. I don’t want to call this fool proof. I think this is easy for anyone young or old. It’s self-explanatory.

One thing I really appreciated about search is that things start to come up. The reason why it’s easy it’s like University of…and options appear. I love that.

Groupings…that’s interesting. I never really thought about that. So…hmmm…your benefits. Now that I think about it. I’ve used this tool so much. Am I expecting to see your military status? Honestly no. But I do think it does make sense and it isn’t an issue. The 3 questions clustered together make sense. Those aren’t my benefits. My benefits are my housing allowance, my book stipend. To me, that’s what my benefits would be.

About your school…you know what…mmm…I don’t know if that makes sense. I think the things in it make sense. I think About your school, I think the profile summary is more what they’re thinking of. To me that is more information about your school. This is more how are you going to be going to school.

Learning format and schedule – this makes sense. The things in here and the title.

Scholarships and funding – it’s right on. I don’t really know what these first two things are.

I don’t know, but is there a better word for benefits?

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?

Back to landing page. Typed Raging…switched to Employers…finished typing wire data center. Clicked option. That’s a mouth full. So I would go to this page and check out the housing allowance. The book stipend is $83/month. The question on my mind is what are my benefits and how much will I be making a month? I’ve never used this before, but it looks good. But if I’m doing this more than a year. The rent goes down. I love that breakdown. I like the book stipend breakdown, even though it’s the same, there’s clarity in that. Opened Learning format and schedule…I wonder if this is the same…oh working 30+. I wonder if that would change anything. Clicked Calculate…yep, it changes things. Would it change if it would be in-person only. This is really great. I’m impressed. Your benefits – I would think this would change because I’m not using my Post 9/11 benefits. I’m thinking about they didn’t even care enough to change this. Veteran -sure. But Post 9/11, I’m not even using that.

To my knowledge, it’s OJT. It’s not using my GI Bill. Maybe I am…I guess it’s a part of the GI Bill tool. Yes, I’m using my GI Bill, but I’m doing OJT. That’s what it seems like to me. I just feel like this is tailor made to OJT. It looks nothing like schools. If benefits is incorrect, then I’d like it to be more tailor made to someone doing OJT. Changed GI Bill benefit – Vocab. Maybe it does matter. But the book stipend is 0 – they are supposed to pay for everything. I’m so confused.

How to get answers – where am I in the process? When I was on the landing page, it says “Get help choosing a school” I would go here if I had questions. I might also consider going to “apply for education benefits” seeing if there was a way to get help and go from there. I would assume. Get help choosing a school, I’m hoping they would have some numbers I could call or take me to a place where if you need help choosing a school, here’s a help desk. I would want to ask someone at the VA. I would want to talk to a human being. This process can be really confusing if you aren’t connected with a school or someone.

The only thing with OJT, when typing it in nothing was coming up and I wasn’t anticipating that I would need to switch it to employers. That was good that it came up after I switched it. After I got the naming correct, it was a 5.

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?

**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!