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

**P3 – Thomas Hammang**

**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?
* 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?
   1. Yes – I just finished using GI Bill benefit. I have more entitlement left and will be using it in the Fall semester. Attending George Washington.

* (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?
   1. I think VA is quite good communicating via email. But I do also go on the website when I need to do the certification process. Before I left active duty, I transferred benefits to college age children. But I have been incrementally transferring benefits back to myself. I’m transferring benefits back to myself semester by semester as needed. I do like to call a counselor so I can get the exact number of days left. I’m talking to the VA – the toll free number that has GI Bill. I make that call maybe twice a year. 3 times a year
2. Have you ever used the GI Bill Comparison Tool before?
   1. Vaguely – I believe that is where a Veteran would have options between Post 9/11 and Montgomery. Me being a 9/11 person, I’m not sure if I have other options. And as far as I’ve concerned, I’m in a pretty enviable place. I do believe what I have is the superior benefit for what I’m getting.

* 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're 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.

And, one last thing... we can't see exactly what you are tapping on the screen, so **before** you actually click on anything, stop and let me know what you're looking at and want to click on. Then we'll know and I'll give you the OK. Make sense?

**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’d want to see them sorted by schools. I’d enter Berkeley….well University of California…because I don’t’ think Berkeley is going to show up…and there we go, second one after santa cruz. And from there, I’m trying to determine the tuition…I’d scroll down to see what else would be an option. There’s the tuition 100% in-state. I’d click View details…This looks to be undergraduates given it’s a 4 year program. I’d click Learn more for GI bill students. Ok…not seeing as that being particularly helpful….what am I specifically trying to achieve? I remember seeing in-state tuition is 100% covered. And the housing allowance and book stipend. Beside those 3 allowances, I’m not sure what to expect out of the website. If I was out-of-state, I might need Yellow Ribbon because that would be more. Again..because I am in VA and would not be an in-state, I think I need another option. I’d look for Chapter 33 with Yellow Ribbon. If I’m going to Berkeley as out of state, I’d need to back out and say that I’m not CH33. I’d just hit the Back button…ok…maybe hit the back button again. Under Programs, hit Yellow Ribbon showing it would hit the match. I’d scroll down to see what else is available on this page. Open Which GI Bill…opens it…Yellow Ribbon does not seem to be there. I’d have to rely on Yellow Ribbon checkmark to give me what I want. Can you open Cumulative…nothing there is helpful. Ok, I’m disappointed, having been checked….maybe view details now that we’ve checked Yellow Ribbon. See where the Yellow Ribbon has been captured. Your estimated benefits…almost $13000…I think there’s a checkmark to say I’m an out of state student…there’s a housing allowance. I still don’t’ see that choice where I can say I’m out of state. Open GI bill benefit. Click Learn more for GI Benefit…at this point, I’d make a phone call. There’s a way to Google how generous Berkeley would be with their Yellow Ribbon. I wouldn’t be satisfied with the site. Maybe the about your school? Opened it…there you go…are you an in-state student – no. clicked learn more on tuition and fees per year. Yeah, close that there and see if the fact that I said I’m…scroll down further. Ok…and all the way down I can see there is still room to go. The fact that I said I’m out of state, maybe the Yellow Ribbon will be an option…Click Your benefits…Post 9/11 does Yellow Ribbon now appear? Opens accordion…no, it doesn’t. Yeah, I’d probably make a phone call. Maybe scholarships and other funding? Opens that accordion. There…will you be a Yellow Ribbon, yes. I’d forgotten about grad/undergrad. So I think if we go all the way back up…sorry all the way down…so $20 + $12, so basically $33…I’d have to pay $2 per year [he’s doing all of this in his head – not clicking Calculate] Yellow Ribbon and YRP are usually together – and it takes me a while to find YR. To me, Yellow Ribbon is not funding or scholarships…that seems to be a non-VA choice. Scholarships and funding wouldn’t be intuitive for me to be looking for in an application… I’d probably give it a 2 or 2.5. I’d give it a 4 or 4.5 if I’d been able to find it

I’d assume the Calculate benefits button marries up selection and grey box. Actually I think I would have clicked the button. There are clearly estimated benefits in the box already populated. Click Calculate benefits. Alright so I ….so there’s Yellow Ribbon. I would not have expected Yellow Ribbon to appear automatically, but it does. Given my two years at GW, that looks familiar. I understand the benefit in the Fall is much lower, exhausting that benefit before getting to the spring. Regrettably, I had to use other methods to get to the Yellow Ribbon option. Actually we have my input marked as out of state…so if we experiment and note that I’m an in-state student. I’m curious if Yellow Ribbon information would show up. It took me..maybe longer than it should have. I guess it would have been Your benefits…expanded that, scroll down further, I think your testing my memory here which is not as good as I hoped. I may not have choices. Student feedback all the way down…so it’s higher than that. We scroll up higher. Ok scholarships and other funding…we can scroll down again. Where the hec did I say out of state…there we are. Yeah, that’s not intuitive that information about myself would be under about my school. Mark in-state and click Calculate benefits and see if Yellow ribbon is there. And Yellow Ribbon is there..that would have given me significant information and use this tool to calculate Yellow ribbon. Knowing that I was out of state would have driven that.

*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?

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?
* 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** 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?

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.

**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!