**Search and Filtering Usability Testing Discussion Guide**

**P1 – Willard Buhl**

**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 30 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?

**Mobile**

iOS Screen Sharing: <https://support.zoom.us/hc/en-us/articles/115005890803-iOS-Screen-Sharing>

Link 2: <https://it.umn.edu/services-technologies/how-tos/zoom-share-computer-sound-during-screen#Sharing-iOS-Zoom-App>

**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 planning to use your GI Bill education benefits in the next few months? I am just completing using my GI Bill – I believe in its entirety to my youngest son who’s just graduated from college. I think the month of June [was the last time I used benefits]. I’m also using the assistance, the st chapter for another full-time son. He’s using the stipend that you can apply for. The benefits were used at Santa Clara University…University of Santa Clara in California.

* Currently using: When did you start school? Where are you going to school?
* Planning to use: Are you looking at any particular schools?

1. Have you ever used the GI Bill Comparison Tool before? I have not.

* If yes, fantastic!
  + When do you think the last time you used it was?
* 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.

**Option 1**

**First Task: Finding Schools and Filtering - 15 minutes (Staging)**

**Part 1**

Let's go back and time and pretend that you are considering attending **Participant-Named University** and are curious if the Comparison Tool has information on that school. How would you find out what information the Comparison Tool has on that school?

Clicked Menu…Went to top search and typed to Santa Clara University and Yellow Ribbon program which is exactly what I used. Okay, it’s not giving me exactly Santa Clara…I called the Veterans Service Center at the university. This might start me looking at the Yellow Ribbon program. Re-directed back

10% battery ☺

There’s another school location box for me..typed in Santa clara and selected Santa Clara. When steered I found it just a little better. I might have seen that on a bigger screen. This is the GI Bill for students, which looks about right. Maybe slightly less. This doesn’t quite cover half of it. So okay, it found it.

Once I scrolled down, it couldn’t be easier. I just couldn’t see that I needed to go lower to see military details. Additional resources…I guess it’s intuitive to people who just scroll. This is really good, the estimated benefits. I could not have done it if it wasn’t for the Yellow Ribbon program. That area is one of the most expensive in the nation. There’s a lot of information here….they even give the total number of recipients. It’s very low. I’m not sure how many Yellow Ribbon recipients they give each year, but it’s low.

Things to watch for:

* Does the user use the autocomplete functionality or search?
* How many times does the user adjust their search criteria before they get what they want?
* How does the user change their search?

**Part 2**

Upon additional research into said school, you decided that the school wasn't for you. However, you really like the area and are curious what other options are available to you. How would you go about identifying other schools in that area?

I might screenshot that, I might get help choosing a school. Maybe I’d go to that. GI Bill schools, use our school search tool. Here they give me all the videos for factors to consider when choosing a school. So I have some resources there. How about if I go to the school search tool and I go to CA and wow, it gives me a whole bunch of names. So there’s all my…there’s a bunch of CA schools.

Things to watch for:

* How does the user change their search?
* Does the user change the filters?
  + If yes, which ones?
* How many times does the user adjust their search criteria before they get what they want?
* Does the user open the additional information components? If yes, which ones?

Upon completion of the 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?
* What did you think of the filters? Which ones would be most useful to you?

**Part 3**

Of the filter options for religious affiliation, special mission and gender, which ones would you be most likely to use?

You've just learned that you received a scholarship for any school in Georgia that is **Insert preferred filter option**. How would you go about finding schools that meet that criteria?

Things to watch for:

* How does the user change their search?
* Does the user change the filters?
  + If yes, which ones?
* How many times does the user adjust their search criteria/filters before they get what they want?
* Does the user find what they want on the search results page or do they go to the school profile page?
* Does the user open the additional information components? If yes, which ones?

Upon completion of the 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?
* What did you think of the filter tags? Which filters do you think have tags?

**Switch environments - staging**

**Second Task: Acronym School and Filtering - 10 minutes (Production)**

**Part 1**

Let's say you've heard good things about the programs at MIT, otherwise known as Massachusetts Institute of Technology. How would you go about finding that school on the Comparison Tool?

Typed MIT and clicked first option. Hmm…okay, I don’t think that’s the one I wanted. Clicked filter..typed Massachusetts Institute and clicked option. Looks pretty similar in terms of cost. Private.

That wasn’t too tough….I had to spell it out. It was very similar to the other one. I’m now getting familiar with the site. It has apparently a lot of links to the school. Looks very similar to the previous one.

I’d give it a 4+.

Getting to the university is important to get that Yellow Ribbon and you can end up on a waiting list and you can be waiting for years. If you go to a private school and they do this, the catch is that it’s generally not unlimited.

Things to watch for:

* Does the user use any filters or change their search criteria?
* What, if any, filters do they use?
* Did the user input the acronym for MIT? If so, how did they react to the results?
* How many times does the user adjust their search criteria before they get what they want?

**Part 2**

You like MIT, but have some concerns over expenses. You would like to broaden your search to any schools in Massachusetts that are Public Institutions and have the Yellow Ribbon program. How would you go about doing this?

Things to watch for:

* Does the user use any filters or change their search criteria?
* What, if any, filters do they use?
* How many times does the user adjust their search criteria before they get what they want?

**Part 3**

Let's say you've recently moved to the upper east side of Manhattan in New York City. You don't have a car and would like to either bike or walk to school if possible. How would you find out what schools are in your area?

Things to watch for:

* Does the user use any filters or change their search criteria?
* What, if any, filters do they use?
* How many times does the user adjust their search criteria before they get what they want?

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?