**Search and Filtering Usability Testing Discussion Guide**

**P2 – Richard Jefford**

**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? Yes, not looking at any particular schools. Are you referring to vocations or a particular institution? University of Indianapolis. No others.

* 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? No, not that I know of

* 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 2**

**First Task: Finding a School and Filtering - 10 minutes (Production)**

**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 online only. Typed University of Indianapolis. Found it and clicked option. Clicked USA for Country. Opened State and clicked Indiana.

Easy – 5, very easy.

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?

How I might go about it…I think I would do it the same way I did the first time. Where it says keywords, I’d key in upi to see what happens.

Oh there it is, it’s just slow…it’s not wanting to delete there it goes

Typed iupui and clicked first option. This school is almost entirely attended by people who want to reside there…on campus. I don’t want to be a commuter.

It went easy. 5.

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**

Have you ever considered going to a school that was gender-exclusive, had a religious affiliation or special mission (like Historically Black colleges)?

* If yes, have you ever conducted a search for those? What did you do?
* If not, how would you go about searching for schools like that?

Things to watch for:

* Does the user look for any filter options to help them with these?

**Switch environments**

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

**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?

Looking through landing page options…clicked Online. Typed MIT, it’s almost amusing because I’m not smart enough to go to MIT. Clicked top option. Opened Country and selected USA. Opened State…oh my, here’s a problem…I don’t know where that school is…I assume it’s in Massachussetts. Clicked Massachusetts…yep, I found it.

5

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?

Changed All for institution type, clicked Yellow Ribbon. And deleted search results. Went back to State and clicked All. I’m looking at a screen with 2,651 search results. I believe the school is Abilene Christian University.

I assume by putting schools only…I guess that’s something I could have done or should have done. I’m not sure what All would include. Institution categories..not sure what that would include. Clicked Schools only. I’m not convinced that…I didn’t get any different results at all…it’s still 2651 results. Opened Institution categories…yeah, I wasn’t sure what that was going to be. And I don’t know…my selection.

Reprompted with task

Went to state immediately – clicked Massachusetts. Schools, Yellow Ribbon. I think I’ve done it.

Hang on, I’ve got a clock that’s decided to act up. It’ll only do it 10 times.

How would you know its public? I’m not sure I’d even ask a question like that because I don’t care if it’s public or private. Changed Institution type to All. I guess I’d have to search around. No, I don’t know. I saw that a little while ago, but I don’t remember where it was.

Easy – 5

Easier than you think because I’m beginning to have some dementia

Did not occur to me that I’d have a phone call – but I’m going to let it ring

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?

**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?

Changed state to New York. Selected schools only. Institution category…I think I’d probably want to select…no, no I don’t. I’m not sure how that would be better worded, but I don’t care if it’s profit or public. And Yellow Ribbon…I think we’re done here. Oh transportation…[how figure out?] You know I don’t have any idea. I don’t know. I guess I’d have to use another medium here.

What kind of medium?

The first thing I’m looking at here is Alfred State – I have no idea where that is. It could be next door. So I guess I’d do a Google search for Alfred State. I don’t know [how to tell if it was in my city]. I’m looking at locations, so I don’t know enough about New York. I’m a country boy. I’m not being very helpful, I’m sorry.

Fine, easy, 5

Military details – it seems like these questions were above this, so I don’t know why they’re here.

I had said before I wanted to commute…so this is about housing allowance. [What do you think happens when you change selections?] I don’t know. That’s neat…so it changes. That’s very informative. I like that. I’ve never done online school before and I’ve got my Master’s degree. That’s informative.

*Prompt after user tells what they would do* Let's say your ZIP code is 10021. Would that help your search?

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?
* Does the user try the zip code after being prompted?

**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?

**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!