**Search and Filtering Usability Testing Discussion Guide**

**P3 – Marvin Merillat (Assistive Tech)**

**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.

Laptop – Windows 10 base. Have special glasses from VA to help read screens, light sensitivity and such. Does not use a screen reader.

1. Are you currently using or planning to use your GI Bill education benefits in the next few months? Currently using. Off and on at school over the years. I’m currently seeking more schooling now. Online. Some through EKU which is the safety center here in Kentucky and I have some in Florida that I’m using. So it’s virtual type.

* 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, this is the first time I’ve seen this. Never was told about it.

* 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?

So in this I would enter eastern Kentucky university and then clicked option. What else do I have to do here? It tells me tuition 100%. Looking through filters. These are different programs…I’ve never seen this before so I’m seeing what I can look at. I’ve found the school and it tells me where it’s at. I’m not sure why it’s telling me there’s 962 [GI Bill students] not sure why I need to know that.

Clicked All under Institution type…what is this for? What’s the difference here? Oh..employers only….not sure why that’s there. Opened Institution category. Only one option clicked Public. So I guess these are the programs within this institution with which they support? Changed Category back to All. 8 Keys to Vet Success…must be something to the first year. I’ve heard there’s a lot of things people have in the first year for vets.

Religious affiliation….well that doesn’t give me any other options there. Military details…I mean this is basic information every Veteran has to put in. To use the benefits they probably need to know how you are, what benefit you’re using. I came in under 1987 and was under a different chapter. I didn’t get the Post 9/11 until after 9/11. I probably would try to click a couple of these other programs…Yellow Ribbon, I don’t think I qualify for that. Student Vet Group, that would be nice to have. Rogers STEM that’s probably if you’re going engineering, math or science.

So specialized mission – is it just the one category. I’m not interested in any of that. The gender…that wouldn’t bother me at all. When it says Any, I’m assuming its saying all that. I mean why would it would be…I’m. not sure why I would want it to be Men only or Women only. I guess someone might be looking for that. It’s not for me.

I saw the search bar and it said school. If I know a school, I can type it there. So if I…so a search on state. How do I search on school if I know the state but not the school?

If I knew the school, but not the location I’d need a place to put a state or something.

The way I found it, it would be a 5. I knew the school and I didn’t even have to type the whole thing. I assume its because an ACC? accredited school.

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?

Went back to landing page. I’d go back to the menu and then it looks like…so I didn’t check In person. Checked Inperson and online…because that gives me multiple options. You want me to find other schools where this is around? So it says location so if I know the location which is…typed Richmond ken…and cleared entry. Entered Kentucky. I know Kentucky State University is 30 miles away. These others are tech schools. Community colleges and private schools. From this dropdown, I could click options and check out other schools. Clicked Kentucky State University. I guess that’s Kentucky State…not University of Kentucky. You would think that it would pull up Kentucky university since it’s larger. Frankfurt is a little further from me….that’s probably an hour and a half away.

[Find schools in Lexington]

There probably needs to be another bar specific to location…typed Lexington Kentucky…clicked search. Oh there we go…I forgot to hit search. That was my stupidity…I didn’t hit search. The first time I should have hit search and it would have showed me everything. I’m not awake yet, sorry. So this is where I would compare numbers, data…then I could do more details. So it gives me website, programs (clicked Washington state university).

Now since I know where I’m going I should have hit that there…maybe have multiple search buttons. I don’t know. It’s probably my stupidity. So what I’m used to doing, when I enter stuff I hit Enter versus me typing here and hitting the button. That’s an extra step. If you’re a typer and you just like to hit keys…because once I typed Lexington and then he hit enter…so it does work. You have both options there so that’s good.

Religious affiliation in Lexington?

Searched Lexington and once I get here, this is a more defined search. I’d go through all these selections. So the only disciplines they have in here is a Christian church and it gives me the….(tags). Transylvania is putting money into that school, like rebuilding. It’s private and they don’t have that many students.

Religious affiliation – so these areas, it’s really hard to see through all this. Bold, bigger font…make it stand out. More on these titles versus like when it’s bolded in [Institution categories]. HBCU…see like that. Bigger, highlighted or something, it would have been easier to see. You see how this is highlighted – each school. I think the View details needs to be higher by the school name. I’m not sure if the eligible numbers are to get attention. I still don’t know why it says the number of students. Is that important for anything? For me, it’s like clicking school name. I can figure that out as you go through the process with the counselor...like the certifying official, they’ll know all of that. They’re giving me names but not a number. We have a high student Veteran ratio…and I’ll be like, oh that’s cool. I don’t think its that important to me. Its more important how much my benefit will cover, through books, housing and how much other assistance I’ll need. That’s what I would be looking for.

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**

**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?

So we’re talking MIT…went to search. I’m sure with these search bars you can abbreviate EKU. Typed MIT and hit Enter…hmmm….oh my goodness. That didn’t work…I guess this is the long week…went to bottom navigation…I’m not doing that. I’d go back. So I guess I’d have to write it out, which I don’t like…how do you spell Massachusetts? Typed mass….why does it do that? I’m having difficulty. Opened military details. Clicked All for institution type, clicked employers only. Went to keyword and typed mit…clicked first option. What does it want me to do? Typed mass…that’s hard to find…Massachusetts instittu…and I misspelled that, crap. Give me a clue. Guess I’d go to the state – Massachusetts. Holy cow…jeez. Why doesn’t it give it to me in alphabetical order…have the letters at the bottom. I typed in the state and it should just give me the schools within the state. Typed mit and hit enter. I don’t know where it’s located more than that. I would have to google the city or something.

Rate – since I’m having difficulty finding it, 1 or 2

If that’s such a popular and big school, it should pop up. Clicked All for institution type. Let’s see if I did something wrong here…now its finding…did I hit a wrong button here? Clicked schools. Can you tell me how to do it on this one?...These are like little schools, it should do the biggest or most popular? These are just little schools…maybe down here, instead of schools…put the type of school and then eliminate and put more up in the search dropdown. If there’s 100 in there, I still want to have it right here in front of me. In Google, you tend to click on the first or second thing that you see. I don’t like this site.

Staging – mit search…clicked State, Massachusetts…and there, right there. Alright, but I shouldn’t have to…if these are already a default All (Country, State)…There’s only so many schools that start with that (MIT). Actually 100 students there, that’s higher than all the others. It that 0…Veterans usually go to police…that’s odd.

Institution type – I use all so I can see all of that. Employees only…this is like work study or are people trying to use…get their doctorate or other programs through apprenticeships. Me personally, I would just leave it as all. I don’t think it affects anything. If it is All and it gives me too much, I might go back and change it. I probably wouldn’t have looked and saw Religious affiliation and other stuff if she hadn’t brought me down there.

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?

**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!