**Search and Filtering Usability Testing Discussion Guide**

**P5 – Jordan Lindeke**

**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, using it right now. George Washington University. They are pretty phenomenal. I’m pretty lucky to go there and let them take such good care of us.

* 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 don’t think so. I do have a traumatic brain injury so to my memory, no.

* 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) 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?

I’d make sure my status was updated…I’m a Veteran now…and then I would fill in the other information. Personally I prefer in-person classes, but that’s not an option now. Typed George Washington…oh lots of options…I’m assuming this is the main campus so I’m going to click that one. And it shows me all of them and I would assume that is the main one.

I’m impressed that even when you click the main campus – all the options show up. It was nice to see the different addresses so I can tell that I’m picking the right school.

For me it was a 5, it was pretty quick and easy. It laid it out pretty quickly for me.

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 would first go back to the GI bill comparison tool..enter Washington, dc…washington district…when it comes to DC, everyone spells it different…this part is not so good…wash…I have no idea what I would put other then maybe just Washington and probably hit enter to see if the next one…okay, then on the state, go to District of Columbia. And then right there, I’ve got 77 choices in the Washington DC area. There’s definitely options..it’s everything from schools to high schools. I would have to do some weeding out to narrow it down, but its regionally based at least. On the left side bar, I would look down and see Institution type…oh no, that’s private and public. For me, institution type would be what level of education – secondary, undergrad, grad, the professional colleges. Law school. Medical school.

Public. For profit…that was not what I was expecting. It doesn’t look like you can filter past that…at least on this side. It looks like you have to go through them one by one and there isn’t a weed-out tool. I feel like there should be one more option. Depending on what kind of degree – like Masters, Bachelors. In some areas that only has one or two options might be okay. But the bigger cities are going to have a lot of options to consider.

It was definitely not as easy…maybe a 2. I could find the box to type in the city, but when it has a name like Washington – it could be the state, the city. When I got to the second page, I could narrow it down, but it wasn’t apparent on the first screen.

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?

I looked at a female-only option. My dad was supportive. I personally didn’t want to go there. If there was a gender school or an HBCU. I think those things that people might search for.

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) 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?

I’d make sure the top information is correct. Typed MIT…clicked top option…oh no…search…typed in Massachusetts institute..and clicked option. That one uses the proper name.

I think it was a 4. It took a couple extra steps. There are probably a lot of schools who go by the acronyms…we could go through those all day. If you use the acronym, it’s not going to take you directly to the school.

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?

So for me for cleaner options, I’d prefer to go back to the main page. I’d type in Massachusetts here…oh geez, I promise I can spell…and it’s been a long week. These are all the schools in Massachusetts and I’d probably filter that just to be sure. State to Massachusetts, clicked Yellow Ribbon, and changed Institution category to Public.

To me that one was pretty easy…because I had already opened Institution categories. It’s not what I would expect in the dropdown to be honest.

MA is not a huge state, but there are other options. It looks like they’re spread out around the state.

Normally search? So I’m working on my 3rd masters. My undergrad I looked in southern Penn, northern Maryland. The second one I looked in the state of Georgia. And this last one was based in DC. Usually I’m looking in a 200 mile radius. I’m never searching the whole country. I just go on Google and go to different school websites to see what they offer. It might have been the Princeton review…they had population, cost, majors, minors, everything. It kind of changed everything. My search hasn’t graduated to a higher standard.

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!