**Search and Filtering Usability Testing Discussion Guide**

**P6 – Jenny Holbert**

**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? Starting on 25th – University of Mary Washington

* 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? Not sure

* 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?

Typed university of mary and selected university of mary Washington-fredericksburg

Very easy – so that was easy enough to find.

Scrolling – Student Vet Group, Yellow Ribbon. I’m curious what Yellow Ribbon would look like. I have no idea what Rogers STEM is…not interested in the others right now. Opened Your housing allowance…that’s important. Right now, that question about In person or online is important because I don’t know how the VA is changing their benefits. Their decisions are only good through Dec 31st about the COVID virus.

I’m trying to see what Student Vet Groups are at Mary Washington and what Yellow Ribbon they have. I’ve been enrolled for a year and I’m not interested in any of the other options. I don’t care about Women or Men only. I don’t care about religious affiliation. So I just don’t know…I’m curious about Yellow Ribbon because I don’t know if that would affect my future studies because I don’t know what it is. 0 results…so it tells me that they don’t have those programs. I selected too many…maybe if I deselect one or all of those, I might get a search result. I just would start deselecting. I’m going to start with Yellow Ribbon (deselect). That didn’t change anything. I’m going to change to In-person/online…that didn’t change anything. So I’m going to deselect Student Veteran Groups…and it’s back. So it doesn’t have any of those things…that’s not helpful at all. I was defeated.

It was very easy – 5.

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?

Umm…what I would do is…changed State to Virginia…went back to landing page. Hmm…cleared search criteria. Mary Washington is near my hometown. Well this is not helpful. Oh enter a city…enter a location. Typed Fredericksburg Virginia…we’ll see what that does. Clicked Search. Okay, so now we’re in schools in Richmond, so there’s a bunch

It was good – it doesn’t tell me what the distance is in miles. I would have to figure that out. I’m 63 years old so I’m going to drive to school. I’m not going to pick up and move to a dormitory. I would be a daily commuter. I would go to only either DC or Richmond. I would go within 60 miles to be a daily commuter. Or I’d go online. So it’s only helpful to a certain extent.

People aren’t all going to be young, live in dormitories or get an apartment. There are a lot of people with kids and are locked into a house and they are going to have to drive to school.

This is not very user-friendly. I would say this is about a 2.

It doesn’t tell me geographic distance. Even if it gave mileage it might be helpful. You have to be practical about how long it would take to get there.

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?

Prompted for new filters

Clicked Historically Black and selected Women only…no results. Let me find a Yellow Ribbon program. Let me see if they have Yellow Ribbon…if GI Bill doesn’t pay, then Yellow ribbon will pay the difference.

I’m glad they have the cautionary warning there. It’s good so I’m not naïve going into a education situation.

It was a 5

Do you expect schools to be Historically black and women only or just either?

Both

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?

I’m just going to be sloppy and put in mit and see whether it comes up. Okay…maybe not. They want me to spell? Haha. Typed Massachusetts..and clicked option. I guess that’s good, I can spell Massachusetts pretty good. That tuition is pretty high so I think that’s right.

That would be a 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?

Okay…I think I would go back…let me see…no I didn’t like that. I’ll go forward. I forgot everything I learned. Clicked State and selected Massachusetts. Highlighted search result. Clicked All for Type of Instutition and cleared search. Went back to Landing page…typed in Massachusetts and clicked first option. Clicked Yellow ribbon. Okay, that should do it

[How can you tell if they’re public or not?] They’re schools – looking at type of institution. I don’t know if I can tell you that. Opened Institution category and selected Public. There it is.

Umm…that was more of a…I didn’t know there was this institution type…you had to keep prompting me on that. I’d say a 3…yeah, because in my mind I could care less whether they were public or private. It’s not something I think about. Even Mary Washington…I think it’s public, but I’m not 100% sure on that.

Mary Washington – looking for a major in floral design and they only thing I saw was a community college. That was really hard to find. So I ended up going local. I decided to double major in English and Theater. Theater is as close as I can get to floral design. I didn’t want to go into the arts because you have to have a portfolio to get into it. You just can’t start from scratch as an art major these days.

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!