**Search and Filtering Usability Testing Discussion Guide**

**P8 – Daniel Georgi**

**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 I am – I’m currently using them. I’m using 9/11 for my daughter who is a student down at Cristabor University. I have not used them personally. I have willed them to my oldest daughter and then my youngest daughter.

* 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?

I’m in Washington DC area – so Georgetown University.

I’m going down – I’m looking at the first three statuses. I clicked on schools and in-person. And then enter school Typed Georgetown univ, now I’m looking at dropdown and just going to click on top option. 5 search results come up. I’m looking at what Georgetown University would be appropriate -I think it’s the first one. It gives me a breakdown of the housing, tuition would be. I’m going to click view details…just gives me a bigger picture of everything. Looks like GI bill will pay for $22800.

I think it went okay – and I want to see if there is any Yellow Ribbon associated with this school. And yes, it is. I’m going to click on Yellow Ribbon, which would help me pay for the remaining out of pocket. It is a private school – so it may or may not qualify for the Yellow Ribbon program. It just gives me a generic on what the program is. It would be nice if it would tell me by school which ones subsidize that. Yellow ribbon at the bottom. So it looks like it may qualify for Yellow Ribbon – what it doesn’t tell me if there is a limit on the number of Yellow Ribbon recipients.

I’d give that easy, a 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?

I’m going to see how I can find schools within 50 miles of Georgetown. I wonder if I go back to where I was…I’ll go back to GI Bill Comparison tool. I want “schools within 50 miles of zip code 22310” searched…no, I did something wrong. Let me go back…I’ll search Washingon d.c…..clicked schools only. …I’m going to get back out of this…search Washington dc from home page. Now it’s actually got Washington DC and Washington state. Goes back to the landing page and take out the periods. See…yes, this is much better. Looks like its given me the choices within the DC metro area with the exception of Georgetown. I’m trying to figure out why it’s not there. My thought process is now…why can’t Georgetown come up. Why doesn’t American University come up? Doesn’t give me the option of virginia, just district of Columbia. Let me try that searched “district of Columbia” okay I’m looking again and I can’t find the schools I’m looking for. Let me put in American university which I know is here. I’m looking for a specific university. Looks like it has 606 GI bill students..I’m not interested in those other schools.

A little more frustrating because I’m trying to get to schools within driveable distance to my house and I’m trying to find out how to do that. How do I find schools within certain distance of 22310…I’m going to go back…there has to be a way to do that. I’d like to put in…I’ll put in hometown “alexandria, virginia”…ok, west virginia..that’s 4 hours away. If I could find something that would narrow my search to my zip code, I’m looking for that. How can I get to schools within 50 miles away. I don’t know how I can do that. Returned to landing page.

I’d say a 2 because it did bring up Georgetown and American, but it brought it up separately. With American, it gave me countries associated with them and not the campus. I’d like to filter it more.

ZIP question – what expect?

I would expect something with the ability to locate a school near my home. City, school or zip code, click zip code, then within 50 miles, 100 miles, etc.

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?

I did see that on another page…let me put in “American university” hit enter. Scrolled down…there’s gender and HBCU…and there it is for gender. But again, to your right is a lot of information I’m not really interested in. I wish it could be where I could go right to American University. But I could click on Historical black college…I’m looking to see what happens there…I clicked on it…there’s the affiliation that doesn’t really matter to me. I’m wondering where the historical black colleges are. Maybe American isn’t considered an HBCU. It doesn’t pinpoint it for me, maybe take that out, but how would I get to an HBCU if I didn’t put it in there. I’ll put in HBCU and see what happens – nothing. Yeah, it’s a little frustrating.

That didn’t go well at all…you would think that if I put HBCU in a search 13 or so of them would come up.

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 going to go down and type mit…yeah this is uhhh…I don’t know what I’m doing wrong here. What would be helpful for me…is if I put in MIT and MIT came up instead of typing out the whole thing. I get all these other schools starting with the letter A that I’m not interested in. Changed search to Massachusetts institute..and clicked option. Okay, so that wasn’t too hard. It didn’t take an acronym. And that’s the school I’m interested in.

I would have liked if I could have put an acronym..unc, ucla…looks like you might have to spell it out and maybe if two schools have the same acronym like usc, it would bring up both schools. Would have been nicer if I could just put in MIT. A 3 only because it would have been perfect, 5 if it had come up…1 if it hadn’t shown up at all.

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?

Let me go back to comparison tool…other schools in Massachusetts…changed search to Massachusetts…so it gives me a list of schools here and clicked one. So clicked Yellow Ribbon. Where’s university of Massachusetts? Why won’t that pop up? Searched Massachusetts. I’m assuming that by me clicking Yellow ribbon…I assume they all offer Yellow Ribbon. And that’s it. It looks like those are my choices. Which is a pretty good selection. Went to school profile – I’m looking to see if there’s any Yellow Ribbon information.

I’d give it a 3. I still wonder whether I would qualify for the Yellow Ribbon to cover this remaining expense.

Where is Yellow Ribbon? Learn more? I don’t even know how to get out of this. Remember – nobody’s wrong here. I like how it gives me how much it costs.

The only one I’m really familiar with is Yellow ribbon. I’ve heard of STEM.

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!