**Search and Filtering Usability Testing Discussion Guide**

**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? P: Yes

* Currently using: When did you start school? Where are you going to school? [likely planning to use benefits]
* Planning to use: Are you looking at any particular schools? P: No, nothing particular.

A: are there any green schools that are on your list?

P: maybe. Are you referring to vocations or particular institutions?

A: particular institutions

P: university of Indianapolis

A: any others?

P: no.

1. Have you ever used the GI Bill Comparison Tool before? P: No

* If yes, fantastic!
  + When do you think the last time you used it was? P:
* 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?

P:

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?

P:

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? P:
* On a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task? P:
* What did you think of the filters? Which ones would be most useful to you? P:

**Part 3**

Of the filter options for religious affiliation, special mission and gender, which ones would you be most likely to use?

P:

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?

P:

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? P:
* On a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task? P:
* What did you think of the filter tags? Which filters do you think have tags? P:

**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?

P:

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?

P:

Things to watch for:

* Does the user use any filters or change their search criteria? P:
* What, if any, filters do they use? P:
* How many times does the user adjust their search criteria before they get what they want? P:

**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?

P:

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? P:
* On a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task? P:

**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?

P: [typed University Of Indianapolis] Found it.

A: do you think you ended up in the right spot for this task?

P: I’m not sure what you mean, ended up in the right spot for this task

A: do you think you found the university of Indianapolis?

P: yes

A: how do you think that went?

P: easy

A: on a scale of 1-5 how would you rate the task?

P: 5, 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?

P: I would think I’d do it exactly the same way I did the first time.

A: can you show me?

P: sure, where it says keywords, I’d type in IUPUI. Ok, that didn’t work the way I was hoping. [it was too slow] ok, there it is. [IUPUI professional development and corporate ed office of community engagement, seemed wrong]

A: can you tell me a little bit about this school?

P: it’s attended by a lot of people that want to resign on campus. Yeah, I want to be a commuter.

A: how do you think that went?

P: easy.

A: On a scale of 1-5 how would you rate it?

P: 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? P:
* On a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task? P:
* What did you think of the filters? P: Which ones would be most useful to you? P:

**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)?

P:

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

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?

P: [looked through filters on landing page to make sure they were right] I went down too far. [typed in MIT in search]. It’s almost amusing because I’m not smart enough to go to MIT. Ok, got it.

A: and then we you find the school that we’re looking for, see if you can say, I found it.

P: alright. Oh my. Here’s a problem [had clicked into state dropdown] I don’t know where that school is. I assume it’s in massachusetts. [selected MA] oh, there it is.

A: on a scale of 1-5 how do you think that went?

P: 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?

P: [switched to All institution types, checked YRP checkbox]. Ok, I think I’ve done it. [hadn’t selected MA in state dropdown] I have the first school, Abilene Christina University.

A: I see your mouse is down by select an institution type. Can you talk about what that means to you?

P: well, I assume by putting schools only, I’m guessing that’s something I could do [?] should I test that out?

A: if you’d like. I’m curious to see what results you’d get

P: I didn’t get any different results at all. It still says 651 [2,651] search results.

A: what do you think is happening with the institution categories?

P: I wasn’t sure what that was going to be and what results that would have on my selection.

A: [repeated task]

P: [switched state to MA] ok, Massachusetts, schools, yellow ribbon. I think I’ve done that.

A: [?]

P: just a second. I have a clock that’s decided to act up.

A: are you in the part of Indiana that has east coast time or central time?

P: east coast

A: has it settled down now?

P: yes

A: so my question is about public institutions. How would you know it’s public?

P: I’m not sure I’d even ask a question like that. [wasn’t sure how to know]

A: so just generally for this task, how do you think this went?

P: easy.

A: you want to give me a rating?

P: 5.

A: alright, you are just blazing through these tasks

P: easier than you think because I’m beginning to have some dementia.

A: well, you are doing fantastic on these tasks.

P: [phone started to ring] hold on just a second. It did not occur to me that the phone was going to ring. Please go on.

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? P:
* On a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task? P:

**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?

P: alright [switched state to NY] schools only [selected] institution category…I think I’d probably want to select, oh, no. I wouldn’t. that kind of threw me. Institution categories. Im not sure how that would be worded. I don’t care if it’s profit or private or public. [switched to public] I think we’re done now.

A: how would you figure out if you could bike or walk to school?

P: I have no idea. I don’t know. I guess I’d have to use another medium here.

A: what kind of medium would you use?

P: for example, the first thing I’m looking at is Alfred state. I have no idea where that it. It could be next door, so I’d do a google search on Alfred state.

A: how would you be able to tell if the results where in new York city?

P: I don’t know. I’m looking at the locations. I don’t know enough about new York city. I’m a country boy. I’m guessing it’s like cuny city college. If it’s in new York, new York, I imagine that’d be helpful. That’s not very helpful, is it?

A:

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

P:

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? P:
* On a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task? P:

**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? P:
* Any questions for me? P:
* I want to give a chanced to the other people on the line to ask a question.

CC: [asked about your military details and housing allowance filters] [he noted that he had seen the military questions above earlier]

**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!