**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?

[Using a laptop, windows 10 based. Has special glasses from VA to help him read the screens and for light sensitivity. Does not use a screen reader?]

**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: Currently using

* Currently using: When did you start school? P: off and on over the years. It hasn’t been consistent, but I’m currently seeking more school now. Where are you going to school? P: online, I’m doing some through EKU which is a safety center here through Kentucky, and I have some in Florida that I’m using, so it’s kind of virtual type.

A: we have a lot of people using their benefits to go online.

* Planning to use: Are you looking at any particular schools? P:

1. Have you ever used the GI Bill Comparison Tool before? P: 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? 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: OK, so I’d enter it down here. I guess I’ll type the whole name, eastern Kentucky univ…ok, so there it is [autosuggest] ok, so it gives me the tuition, 100%. These are different programs. I’ve never seen this before so I needed to see what I’m looking at. Ok, so this is just finding the school, so I found the school and it tells me where it’s at and it tells me that, I’m not sure why it tells me that there are 962 [gi bill students]. Why do I need to know that? It tells me the tuition, 100%, and the monthly housing, and the books. It gives me the estimate for that. What is this here? [clicked schools under institution types] what’s the difference here? It says employers only. I’m not sure what that’s for, why that’s there. public inst..[institution categories]. Ok, let me see if that changed anything [selected public] principles of exce..ok. so I guess these are the programs within the institution that they support. I know about 3 of these I’m not familiar with. 8 keys to vet success. It must be an internal school thing. There must be many different names to help schools. Principles of excellence, I’m not sure what they are.

A: as you’re scrolling down the page, do any of these look like they’re of particular interest to you?

P: [tried seeing religion filter] ok, doesn’t give me any other options there. [opened military info] so this ins information the veterans need to give right? It’s just putting your details there, who you are, which benefit you had…like me, I came in in 1997. I had a different chapter. I didn’t get the chapter 9/11 until 9/11. I retired until 2013 so I had a different benefit. I probably would try to click a couple of these other programs here to, I’m sure I’d get priority placement. Yellow ribbon, I don’t think I qualify for that. Student vet group, that’d be fun to have. This is probably for engineering, math or science [stem filter]

A: what about for gender, specialized mission, religion, any of those particularly interesting to you?

P: so specialized mission, is that just one category? I’m not interested in that, and the gender, that wouldn’t bother me at all. When it says any, I’m assuming it’s saying all that, so. Why would it be, I’m not sure why I would need it to be women or men only. I guess if that person is looking for something like that. Me, I don’t think it’d affect the education based off of what benefit I’m using for that.

A: how do you think that went?

P: because I saw the search bar and it said school, if I know of a school and I can type it there, I did. So I guess, [clicked state dropdown] so it searched on state. how do I search on school if it searched on state? how do I do that?

A: how easy do you think it was to find the school?

P: to find it? If I didn’t know the school, but I knew the location of where I wanted to know, I’d want to know the schools that [?].

A: I’m going to ask you that in a bit. How would you rate that? [1-5]

P: I believe it’d be a 5. I knew the school and I was able to type it there, and it even had the school. [?]

A: so you were getting a little bit ahead of us.

P: I’m sorry.

A: no that’s great. You’re thinking ahead. [read the next task]

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: on this search or I have to go back to home?

A: yeah. However you think you might want to do it

P: I’d go back to where I started. So I didn’t check this [how do you want to take classes] I’d probably want to check that one [in person and online] because It gives me multiple options. So you want me to find other places, other schools around where this is at?

A: yeah

P: ok, so it says location, so if I know the location, which is Richmond Kentucky, does it go by…no[ no suggestions]. It says enter school, location, so I’d kit Kentucky [typed it in and saw autosuggest optons]. Ok, so I know this one is in lexington [ksu] I know some of these are tech schools or community colleges. I’ve never heard the…ok, so I guess from this dropdown here I could click on and find out what options and what type of school. so I could use that to compare, so it says Frankfort [Kentucky state university] oh, I guess that’s Kentucky state, not university of Kentucky. So it didn’t pull up… you’d think they’d pull up Kentucky university, but it didn’t. I didn’t see it there because it’s closer to the… Frankfort is a little bit farther away from me. That’s probably an hour and a half. From eku, it’s probably 25 miles or 35 miles.

A: if you wanted to find school sin Lexington, how would you do that?

P: it didn’t work the first time. There probably needs to be a bar or another option, a bar for location. [started typing Lexington Kentucky] capitalize it, is that why? Do I just hit search? Oh, there you go. I forgot to hit search. That was my stupidity. I didn’t hit search. First time, I should have hit search and it would have shown me everything. But ok. I’m not awake yet, sorry. Alright, so here we go. This is where I would compare the numbers, the data, then I can view more details. Let me see what that shows. Ok, so, it gives me the website, the different programs. So this would be more details so I’d probably go to this. [?]

A: how do you think that went? [1-5]

P: since now I know what I did before, maybe have multiple search. Maybe have some… I don’t know. It’s probably my stupidity.

A: this is what we say, you have no wrong answers. We’re trying to see what works and what doesn’t work

P: what I’m used to doing is when I enter stuff, I usually enter enter….vs here, typing here and hitting a different button, that’s different….once I type Lexington, [tried typing and hitting enter] ok, so I guess you have both options in there.

A: [?]

P:… the only option that they have here is a Christian church [had searched for Lexington]. I actually lived near this Christian church.

A: how did you think of that process of finding the religiously affiliated school went?

P: it’s really hard to see. It should be more hyphenated or bolden [select an institution type] more on these titles vs. when I’m hitting [opened inst. Categories] yeah, you’ve got that bolded in there. see, that should be bigger. You see this is hyphenated or highlighted with each school [school card names]. When you put stuff at the bottom, I’d think it’s least important…. I still don’t know why this is there [number of gi bill students]

A: some people are interested in how many veterans, how many gi bill students are at a particular school…

P: to me, when I click here [view details] I can find out, when you go to your counselor, I can find out. My certifying official, they’ll know all of that. They can give it to me. They won’t give me the names or numbers.

A: [asked if he had time for another task since we were over]

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: ok, so we’re talking MIT. I’m sure that these search bars you can probably abbreviate like EKU, and MIT. I’d probably just hit that [had typed MIT and clicked first autosuggest]. Ok, where does it go? Oh my goodness! Where did it go? I guess this is the long way [had gotten many irrelevant search results] ok, I’m not doing that. I guess I. have to write it out [went back to landing] how do you spell it out, how do you spell masssachusetts? [typed mass] why does it do that? I guess I’m having difficulty. Nah. [typed in MIT again and examined autosuggest options] I guess I’ll just go from here [clicking first in list] what does it want me to do? [started typing Massachusetts] Massachusetts I [saw it didn’t come up in autosuggest, finished typing to Massachusetts institute tech] oh, spell check. [erased search] ok, give me a hint. [scrolled down to see number of pages in results] ok, I guess I’ll do it this way. Holy cow! [started scrolling through pages]

A: are you committed to the task? [?]

P: I’m trying to find an easier way to find it. I typed in the state and it should give me the schools within the state [had selected mass from state dropdown]. And if I type in mit, it should give me the school. I don’t know the details enough to search it.

A: so if you had to rate this task on a scale of 1-5, what would you rate this one?

P: having difficulty finding it, I’d have to say 1 or 2. If that’s such a popular or big school, it should pop up like all the other stuff. Let’s see if I did something wrong here. [went back to looking around for the school in the results]

A: [let him know he was in the control version of the site] want to go back and use that one [staging]?

P: you shouldn’t have to type more than, see I still don’t see it [mass]

A: this should only give you a few results.

P: yeah, but these are little schools. It should have the most popular results. Is it searching off of number of gi bill students?s

A: I don’t think so. [idea for ordering autosuggest items based on # of gi bill students]

P: maybe down here, instead of type of schools, but what kind of school is it university, community college. [?]

A: that’s a great idea.

P: in today’s world, when you’re searching something on google, you usually click on the first or second thing you see. Here, it’s not giving me…I don’t like this site.

A: if you want to try the other one, Lexington, we’ll do it here, too. And you wanted to go to MIT.

P: [tried typing MIT]

A: wait a second. It’s supposed to give you one result [came back with 200 irrelevant results]

P: maybe if I click the state.

A: see what happens when you click the state of Massachusetts.

P: [it came back as the 2nd result when he changed to mass state] I shouldn’t have to select [the state]. there’s only so many schools that start with that.

A: thank you so much. I really appreciate your tenacity.

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:

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? 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:

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?
* 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:

*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: when are you all trying to fix that?

A: [told him what we’re working on]

* I want to give a chanced to the other people on the line to ask a question.

[JJ asked about institution type and what he thinks it changes]

**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!