**Change notes to Opt 2 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: I’m using it right now.

* Currently using: When did you start school? P: Where are you going to school? P: George Washington University.

a: I’ve heard good things about how they treat veterans

P: they are pretty phenomenal. I’m lucky to be going to that school.

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

1. Have you ever used the GI Bill Comparison Tool before? P: I don’t think so. I do have a traumatic brain injury, so my memory’s not always 100%. To my recollection, 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?

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?

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?

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?

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: I’d make sure at least my status was updated, which I’m a veteran now. And then I would fill in the other information. [typed in George Washington] I’m assuming this is the main campus, so I’d pick that one. It gives me all the options that GWU has to offer.

A: when you think you’ve found the school, you can just say, I found it

P: I found it

A: how do you think that went?

P: it went pretty easily. I’m impressed that even when you click the main campus, all the options show up, but it was nice to see all the different addresses in there just to make sure I’m picking the main school.

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

P: for me, that was a 5. It was pretty easy. I wasn’t looking for anything crazy to do. It laid it out pretty easily 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?

P: I’d go back to the gi bill comparison tool. I guess, so in here, enter washington, dc maybe. No [nothing in picklist] Washington, district of Columbia. Nope. When it comes to Washington, district of Columbia, everyone spells it differently. [tried district of Columbia. I have no idea what I’d put. Maybe just Washington, and just probably hit enter to see if mayb eon the next one. Ok, right here, on the state tool [dropdown] I’d go down to the district of Columbia. So I’ve got 77 choices in the Washington, dc area.

A: so you think you’d have some options to choose from

P: yeah. The options [?] at least it was regionally based this time.

A: what kind of things would you be looking for if you were interested in a school?

P: I’d look down the list, and hey, there’s institution type. Oh, no, that’s private and public

A: what did you think was going to be in there?

P: for me, institution type would be what level of education, secondary school, graduate, undergraduate, any kind of professional college. Institution type private public, and for profit was definitely not what I was expecting. It doesn’t look like you can filter past that. There isn’t a weed out tool, which is kind of disappointing. I feel like there should be one more option types, like a bachelor’s degree, instead of going through 77. I think in some areas it might not be a problem when you don’t have a lot of results. But in other areas it’s going to be a problem.

A: would you ever be interested in options like women only, religious affiliation?

P: when I was 17 years old [?] it was female only. I would not be interested in that. I think those are things that would be searched for. It’s not some obscure one-off.

A: how did you think the task for finding schools in Washington dc went?

P: it was not easy. I’d say like a 2 maybe. I could find the box to type in city, but when it has a name like Washington, it could be the state, it could be the city itself. Once I got to the second task, it was easy to narrow it down.

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: I’d make sure all the top of the information is right. I’d type I here to see if MIT would come up in the dropdown. It does so I’m hoping, nope. [nothing in search for mit] [tried typing Massachusetts institute] so that one really looks like you should be using the proper name. I found it but using the proper name.

A: alright, and of course I’m going to ask you how that one went.

P: I think it was a 4. It wasn’t hard. There’s a lot of schools that go through their acronym. If you use their 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?

P: for me, for cleaner options, I’d prefer to go back to the main page. I’d look at post-9/11 and then look at Massachusetts here. Geez. I promise I can spell. [selected yellow ribbon filter in srp and then public]

A: how do you think that went?

P: [?]

A: what about the number of results? Does that seem like the right number for you?

P: probably. It’s not a huge state. they look like they’re spread out across the state. I feel like 6 options is a starting point. Each of these schools look like they have a significant number of gi bill students. That’s a good indicator.

A: when you search for a school, are you thinking of searching by state, by region?

P: I’m working on my third master’s right now. My undergrad was in southern Pennsylvania, northern type region. The second was in Georgia. This last one was based in dc. So I’m looking for no more than a 200 mile radius. I already have my life set up, so I’m not ever searching the whole country.

A: what tool are you using to find those schools?

P: I’ve just gone sometimes on google and just started going on different websites to see what they have to offer. This was back in [?] when they had that big book of colleges. It had demographics on the colleges, populations and the cost. That was initially where I looked. My search hasn’t graduated to a higher standard too much.

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:
* 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!