**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 currently using. I’ll be starting on the 25th.

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

* 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?

Did you say you were going to University of Maryland or University of Maryland Global Campus?

P: University of Mary Washington

A: oh, if you could look for it and let us know when you’ve found it.

P: [started typing in full name, picked from picklist, had one result] there it is.

A: how do you think that process went?

P: it was very easy.

A: are there any other items in the lineup that look particularly interesting to you?

P: student vet group, yellow ribbon…I’m curious about what it is. Don’t know what the rogers stem scholarship is. [opened housing additional component] Right now, that question of online, in person or in person and online, I don’t know how the va is doing with their decision [due to covid].

A: let me ask you a question about what you think is going to happen with the information you’re looking at? [ I see a lot of confusion about what the filters actually do, particularly the programs since people think it’ll tell them what the school will do or that their results will keep updating]

P: [?] I don’t care about women enrolled or religious affiliation or military details because I’ve already been enrolled for a year. I’m curious about yellow ribbon because that could be something that affects my future studies.

A: what is your interpretation of what you’re seeing now in the results?

P: that they don’t have the yellow ribbon program. I selected too many. Maybe if I deselect one or two of those, I’ll get results. I have to try deselecting.

A: ok. Do you want to try and deselect some and see if we get a result back?

P: yes. [?] I’m going to deselect in person online because I know that they have in person for sure. [had left student vet group only] [no results still] on interesting. [deselected svg] They don’t have anything in their database for all these programs, so that wasn’t helpful at all.

A: do you want to click on yellow ribbon quickly and see what happens?

P: yeah. [back to no results] I was defeated.

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

P: It’s 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?

P: [went back to landing page] mary washington’s near my hometown. [had been looking around on landing page] well, this is not helpful.

A: can you tell me why?

P: in the comparison tool, it asks you which gi bill benefit you want to use, how do you want to take classes, oh, enter a location. [entered Fredericksburg virginia. Let’s see what that does. [got 119 results] ok, so now we’re at a university which is Richmond. Community college. Virginia tech, uva. Ok, so ther’s a bunch.

A: how do you think that went?

P: that was good, and I was very familiar with all of these.

A: are you seeing some that are close to mary Washington?

P: well, close to home. It doesn’t tell me what the distance is in miles. I would have to figure that out because I’m 63 years old. I own a home, 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 16 miles to be a daily commuter or else I’d be online. So it’s only helpful to a daily extent.

A: talk about what would make it more helpful?

P: yeah. They’re making an assumption that people are young and they’re going to be living in dormitories or move to an apartment. There are a lot of folks that are married with children and are locked into a particular house and they will have to commute to school.

A: how would you rate that task? [1-5]

P: I would say that this is not very user-friendly. I’d say that this is about a 2.

A:[?]

P: I don’t know where you’re located, but I’m on i-95.

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?

A: let’s say you were interested in a school with a religious affiliation or gender-only, how would you go about narrowing those results?

P: [selected HBCUs filter, yellow ribbon ] let me select one with yellow ribbon program because it’s one where if the tuition is greater than what the va pays, the school will pay it… it’ll pay the full amount. You don’t have to pay the full cost

A: sounds about right. What about the heightened cash monitoring you’re seeing there? [had one results of WVSU with a caution flag]

P: I don’t know. I’d just want to make sure… that I’m not naïve going into a financial situation.

A: how do you think that process went?

P: 5

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: [checked the military status Qs first.] this could be real sloppy. I’m just going to put MIT, see whether it comes up. Ok, maybe not. They want me to spell? [Started typing Massachusetts and saw it in the picklist]

A: do you think that this is the results that you’d want?

P: that tuition is pretty high, so I think I’m in the right place.

A: if you were to rate this, how would you rate it?

P: 5. 5 is easy, right? Yeah.

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: I think I would go back. Let me see. No, I didn’t like that. I’m going to go forward [had gone back to mit acronym search results]

A: well, this is a little bit different.

P: I forgot everything I learned. [priming]

A: repeated the scenario

P: I’d have to go back [went to landing page, started typing Massachusetts] you said public institutions, schools, yellow ribbon program?

A: yeah.

P: ok, so that should do it in Massachusetts.

A: ok, great. How can you tell whether they’re public or not at this point?

P: let’s see, they’re schools. [eventually dug through to institution type dropdown]

A: how do you think that went?

P: [mentioned finding the public option was an issue]

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

P: [3?]

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

[jj asked about how she expected the filters to work, if they showed women only or hbcus or women only and hbcus. She mentioned it was women only and hbcus]

[cc asked about how she found mary Washington. She mentioned she’d wanted to major in floral design, but only found a college offering a certificate. Due to physical limitations, she needed to find a school nearby and found mary Washington.]

**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!