**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>

Notice with many participants they’re unsure of how the filters will affect the results, especially when there is 1 results. They think

**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: Planning to. I saw that, so I want to clarify that. I plan on using them. I’m not currently, as I’m speaking, enrolled in class.

* Currently using: When did you start school? P: Where are you going to school? P: the next few weeks, august 24th is when I’m looking to start.
* Planning to use: Are you looking at any particular schools? P: ivy tech community college.

1. Have you ever used the GI Bill Comparison Tool before? P: yes, I’ve used the, for comparing the different resources there. is that the nature you’re implying to?

A: [told her about the gi bill comparison tool]

P: yes, ma’am. I have.

* If yes, fantastic!
  + When do you think the last time you used it was? P: last time was February/January because it was for a new semester for the spring. [? Bad audio] …get my next level or degree quickly by transferring.
* 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?

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: ok, so the schools, first it’s been knowing that I’d qualify for the gi bill. [had trouble with touching amy’s screen as she was on ipad. Amy had her share her screen instead] [searched for ivy tech community college-east Chicago] [ Went to profile page] [?]

A: when you were searching for ivy tech, did you know that you wanted to go to this school specifically or were there other schools?

P: pretty much. [she knew ivy tech was the one she wanted to go to] [?]

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: [was looking for Purdue in WEAMS] [had clicked on get help choosing a school in the additional resources] [went back to comparison tool [found purdue university northwest-hammond].

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

P: I’d say it was a 5. As soon as I started typing, the list came up. It was all at your fingertips. Boom, it was what they had. It was easy, this tool. Compared to things in the past, it was quicker.

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: [she tried searching for MIT, picked the first in the autosuggest list]. That’s not it [in srp]. [went back to landing page. Somehow ended up on education & training hub, from breadcrumb]]

A: are you looking for anything specific in this area?

P: just MIT

A: Massachusetts institute of technology

P: [tried typing whole name in search on landing page] [found it, went to profile]

A: do you think we’re in the right spot now?

P: yeah. It says Massachusetts institute of technology.

A: great. Do you want to return to the page we were on [srp]?

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: [started scrolling down page, searching] ok. [selected yellow ribbon filter] yellow ribbon, that?

A: mhm. So public schools in Massachusetts with yellow ribbon program. [was unable to find the school] [suggested she clear her search results]

P: ok, so clear this out. [eventually found the public option, also yellow ribbon] [selected Massachusetts as the state.

[She rated the task a 5]

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.

[CC asked about her initial experience with the Comparison Tool. She mentioned that someone at a VA center had walked her through it back in Jan/Feb]

[JJ asked what she thinks the options are for institution type]

**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!