**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, I am. I’m currently using them.

A: what benefits are you using? I’m using the post-9/11 gi bill for my daughter who is a graduate student at the [?] university. [they benefitted his oldest daughter and now his youngest daughter]

* Currently using: When did you start school? P: Where are you going to school? P:
* Planning to use: Are you looking at any particular schools? P:

1. Have you ever used the GI Bill Comparison Tool before? P: I have not

* 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.

a: when you were thinking of going to schools, were there any schools that you were thinking of going?

P: yes. [American university and Georgetown university]

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 **Georgetown 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: first of all, I’m looking at the first 3 statutes. I’m a veteran, post 9/11 gi bill. I have schools, and then I’m physically looking to go to Georgetown. I’m going to type in Georgetown university [Georgetown univ] I’m just going to click on Georgetown university and it’s the closest one that I can see. I’m looking at which Georgetown would be appropriate for me. Looks like the top one, there are 749 students enrolled. And then it gives me the tuition and housing and what that would be. [went to profile, reviewed eyb estimates]

A: ok, great. So you think that this is the Georgetown that you were thinking of.

P: yes.

A: fantastic. How do you think the process went for you?

P: it went great. I’m looking to see if there’s any yellow ribbon associated with the school. yep, yellow ribbon down here [veteran programs] I’m going to click on yellow ribbon, which would help me pay for the out of pocket portion. I don’t see where Georgetown offers that. It is a private school, so it may or may not qualify for the yellow ribbon program.

A: where it says yellow ribbon, what is your understanding of that?

P: I already know what yellow ribbon is. What it would help me is what the school would subsidize for yellow ribbon. What I’m looking for is whether they would qualify for yellow ribbon. Oh, there you go, historical information… it looks like they may qualify for yellow ribbon. Now what it doesn’t tell me is would I automatically qualify for yellow ribbon as student number 255.

A: on a scale of 1-5, how hard or easy was it to find Georgetown university?

P: I’d give that easy, a 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: ok, so let me just look at what you offer here. I’m trying to see if I can find schools within 50 miles of Georgetown. I think I’m good on estimating benefits. Let me go back to the gi bill comparison tool. Let me see if there’s somewhere where I can put schools within 50 miles of zip code 22310 [typed schools within 50 miles of zip code 22310]. Nope, something went wrong. Got Colorado springs, Washington, Georgia.

A: we said no wrong answers.

P: [went back to search bar and typed in Washington d.c.] oh, it’s actually got Washington state in there. let me take the periods out. [went back to landing page] gonna take out those periods so I don’t get the other side of the coast. See, Washington, state came up again. Nope. So strayer university, university of Washington. Looks like it’s giving me the choices in the dc metro area with the exception of Georgetown, which is not there. maybe they’re not offered. My thought process is now, why can’t Georgetown come up? Why can’t American university come up? Let me think what I can do here. Let me try virginia. Let me try that, district of Columbia. [typed it in srp search field]. Ok, I’m looking again, and I can’t find the schools I’m looking for. I’m trying to figure out why. Let me put in American university, which I know is here. I’m looking for a specific American university. [typed in American university] there’s American university, it’s got 606 students. [mentioned tuition and housing].

A: looking for other schools in the general area, how did you think that went?

P: a little more frustrating. I’m trying to get to schools within driving distance of my house. How can I get schools within 50 miles of 22310? I’m tooling around to see how I can do that. I’m going to go back to the GI Bill comparison Tool. In person only [landing page]. Enter a school, location, or employer name. that’s the key. I’m going to put in my hometown of Alexandria, virgiania [typed Alexandria, virginia] ok, vcu, that’s four hours away. West virginia… that’s four hours away. If I could find some way to narrow by zip code, that would be really helpful. How can I get to schools within 50 miles of where I am? I don’t know how to do that.

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

P: I’d say a two because it did bring up Georgetown. It did bring up American. I had to bring them up separately. Even when I put in American university, it gave me countries which were associated with American university when I was looking for the main

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: I know I saw that on the other page. [typed in American university] ok, so there’s gender, any, and then it has historical black colleges. When I put in my university, I tabbed all the way down, and there it is hbcu, and there it is for gender. To the right is a lot of stuff I’m not interested in. cauro, Antigua. I realize why you do that… if I want to go to a historical blac college, click on that.. affiiation, it doesn’t really matter to me. I’m just trying to find out where the historical black colleges are [had 9 results.] maybe American university is not an hbcu. Maybe I take that out [went to landing page] how would I get to an hbcu if I didn’t put anything in there? let me go to an hbcu and see if anything comes up. Nothing. This is a little frustrating. There’s hbcu. Schools only. I’m looking to try to get to hbcu, and it’s not producing anything. There’s no other institution categories. Does that answer your question?

A: how do you think that went?

P: it didn’t go that well.

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, you took that away from me. Let me go down to. I’m going to type in MIT [200 results] unbelievable. Yeah, this is, I’m doing wrong here.

A: no wrong answers.

P: what would be helpful for me is if I typed in MIT instead of Massachusetts institute of technology, MIT came up. I’m getting all kinds of results starting with the letter A which I’m not interested in. I’m trying to see what else I would do. Let me see here [typed in Massachusetts institute and picked it from the autosuggest] ok, so that wasn’t too hard. I just had to spell it out. Mit didn’t give me anything, but this one did.

A: how do you think that went?

P: I would have liked, if I could put an acronym… ucla…it’d be nice if you could put the acronym in there, and if two schools had thee same acronym, it would give you both of those. In my case, it gave me the whole alphabet. Instead of spelling out the whole name, it would have been nicer if I could have typed in mit

A: do you want to give that a rating on a scale of 1-5?

P: I’m going to give it a 3.

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: ok, I’m going to type in [?] [typed in massachusetts] ok, it gives me a list of schools here. I wonder where u mass is. I typed in yellow ribbon and I typed in Massachusetts. Where’s university of Massachusetts. Maybe that’s it right there. ok, so it gives me a breakdown. I’m trying to see which one covers yellow ribbon. I’m assuming by me clicking yellow ribbon, they all pop up. [?] I’m looking to see if there’s some yellow ribbon in there [had gone into MIT profile and selected YR filter]

A: how did you think that task went?

P: I give it a 3. Again, I’m still wondering in the back of my brain, would I qualify for yellow ribbon to qualify or this 25,000 which is out of pocket. [tweaked EYB calculators] learn more [had clicked Tuition and Fees learn more] [A had to help him navigate back since tabs were cut off] I do like how much it costs and that it does give yellow ribbon. Those are great features.

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.

[cc asked about use of gi bill. Mentioned both daughters used it. Asked about familiarity with veteran programs – wasn’t familiar with OJT, only familiar with YRP, STEM, and maybe independent study. Asked about where to change to online classes, was able to show it. ]

[JJ asked what he would want for the zip code search, said he just wanted to search by distance]

[Would want to see ratings and some kind of feedback mechanism. His daughter got a survey asking what her experience was at Indiana state university. Said maybe his 2nd daughter will get one] “This GI Bill benefit is easy to use and they’re always receptive at the 1-800 number.”

**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!