**STEM Usability Testing Discussion Guide - Round 2**

**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 application for a new scholarship for Post-9/11 GI Bill beneficiaries.

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.

We will be working in a prototype so some functionality will not work as expected. For example, when you click on a field, an answer or selection may pre-populate or alternatively, you may click on something and nothing may happen. In those cases, I'll let you know that the functionality isn't working and ask what you would expect to happen.

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?

**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 have you ever used your VA education benefits?

P: No, I have not.

A: do you know which one you have?

P: Yes. I have my own, but I also have my husband’s [?]

* + Which benefit?

1. Do you know roughly how much of your education entitlement you have left?
2. Are you familiar with the Rogers STEM scholarship?

P: No, I have not [heard of it].

* If yes, what have you heard about it?
* If no, as a quick summary of the scholarship, the Rogers STEM Scholarship provides up to nine months of additional Post-9/11 GI Bill benefits (to a maximum of $30,000) to qualifying Veterans/Fry Scholars seeking an undergraduate STEM degree or who have earned a STEM degree and are seeking a teaching certification.

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.

Note: Each participant will go through ONE of the tasks below.

**Task 1: Authenticated User with Too Much Entitlement - 15 minutes**

We're going to do some role playing. Let's say you're Sammy Smith and you're using the **Post 9/11 GI Bill** to obtain an undergraduate degree in **Chemistry** from **Chicago State University**. How would you go about filling out this application? You will log in as an authenticated user.

*When eligibility warning alert on intro page appears*

* What did you think of the eligibility alert message you saw?
  + Where do you think the information is coming from?
  + Do you think this information is accurate?
  + Would you still apply?

*When school information appears*

* What did you think of the pre-population of school information? What would you do if the information wasn't right?

Things to watch for:

* Does the user read the subway map?
* Does the user experience any confusion in determining how to start the application? (Need to scroll to bottom of page)
* How does the user react to the eligibility alert message (entitlement)?

**Upon completion of task**

* In your personal field of study, would you expect to be eligible for this scholarship?
* In terms of applying for this scholarship, on a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task?

**Task 2: Unauthenticated User that is Not Chapter 33 - 15 minutes**

We're going to do some role playing. Let's say you're Jamie Lee and you're using the **Montgomery GI Bill** to obtain an undergraduate degree in **Chemistry** from **Chicago State University**. You don't currently have an account and aren't interested in creating one. How would you go about filling out this application?

P: So you said I don’t want to create an account, correct? Ok, I’m just reading through everything [eligibility requirements and steps].

[was able to find link for starting app without signing in]

P: Social secdurity number, don’t like that that’s required, but it always is. Which benefits have you used and are currently using? I have Montgomery gi bill.

P: Based on your response, you’re oh! I’m pretty sure I didn’t click that one. I clicked the wrong one I think [ she had selected mgi b and went back to benefits q to make sure she clicked the right one]. Oh, I see. Yes.

A: tell me what you see

P: it keeps on telling me that I’m not eligible. [?] even though it keeps telling me I’m not eligible, I would still apply and let them determine my eligibility. If they gave me a phone number, I would probably write that down and I’m just going to continue. Are you enrolled [in stem]? Yes, I am. How much of your education benefit do you have left?

A: let’s say you have less than 6 months

P: I am running out. Based on your response it looks like you’re not eligible. Ok, it’s still that first one that is holding me up, which looks like an error on their part. So yes, I would still like to apply [clicked yes].

A: so let’s go through this one more time. Talk to me about your alert and your response

P: to me, if I found out about this rogers stem scholarship, I would have researched it. It keeps on saying I’m post-9/11, and I’m using mgi bill. If I apply and it denies me, can I reapply later or is it one and done? I could fill this all out, and then it tells me it’s not eligible. Can I go back and apply again? Are you allowed to apply for the scholarship more than once? Maybe I should call that 1-800 number.

A: so at this point you think the system is having an error, that it’s showing you that you’re using a recent post-9/11.

P: yes [?] right now, I think there’s a glitch in the computer system, and it’s recording my response wrong… I’m hoping to get to an actual fill out page where I fill out my responses. If I get all the way through this and there’s no way that I could explain that I’m not using post-9/11, that would stop me because there’s no way it wouldn’t say you’re ineligible. If I could type in, like a true, it used to be paper and pen application. I’m waiting for that so I could put my true correct responses because the computer isn’t working…that’s why I’m continuing on because I think I could correct it on an actual form later on before I submit. If I get to 6 of 6 and it’s ok, hit the submit button, I would definitely call the number and let them know what can I do? It’s having a problem.

A: excellent. You’re doing just a fantastic job of talking this out.

P: I talk to myself all the time, so it’s years of practice!

A: so here you want to still apply. What’s your next step?

P: I would just continue on at least until the last page to see if I could change my response somehow in my packet. Should I continue now that im curious?

A: yes

P: ok, so chemistry, Chicago state. hope I don’t get shot. Student id number.

A: is your student id number ever been your social security number.

P: it’s a completely different number. [filled out rest of form] direct deposit…I can see where there should be a disclaimer, if you receive a scholarship, there should be an x number of days. That makes me nervous. My cat’s nervous, too. Oh, it does give you an option that if you don’t want to use direct deposit, but I’ve had enough experience to know that it’s a hassle. Ok, review application, let’s see if I can check this stuff out. I don’t think it lets me edit. Oh see, it is there. [on review page] oh, I’m confused. I would have to talk to somebody at this point. [read the “are using p9/11 bullet carefully]. I did see that you could send them a message, and I see that there is a chat button here. I love those chat buttons, but I’m going to submit a question to education service [need help section link], and screenshot this, and include it in my message to say that I’m really confused here. I’m not sure what this is about. I would have to get an answer from them before I submit the application. [?] maybe it said it on the very first page, maybe I didn’t read carefully enough. There is that. Let me see if there is, how to apply [breadcrumb].

A: let me see if I can transport you there. [took her to intro page] and you should now be able to take control

P: [started reading intro page carefully] you are using or recently used post 9/11, oh, so that’s why I wasn’t eligible, but I’m going to apply anyway. Maybe they’re not meeting their quota, but I’m still going to apply.

A: let’s juts go through quickly now that you had seen that. And you said you’d research the [scholarship] prior

P: yeah. So, Montgomery gi bill I’m currently using. Ok [on ineligibility page] yes, I still want to apply.

A: talk to me a little bit about what you’re thinking

P: so I’m a little confused. [was confused by seeing the x] so based on your response, it should give me what my response was. It says your response, but it’s telling me no, you didn’t click this. Maybe your response, it gives me what my response was… it makes a little bit more sense now that I’ve been through it. [went to full summary page] when it shows me the two green checkmarks, the x needs to be red. Maybe it shows me a little red x there. I’m just going to scroll back to [went to first summary page] so yeah, what I think would be best is to give me my response what I said and then give a comment below that, to be eligible, you need…

A: that’s such a helpful perspective to have the other checkmarks there, too. Do you think you would be eligible?

P: no, because I’m [?] I would use montgomery gi bill first and when I ran out, I’d use post-9/11. Then when I ran out, I would use that. So based on that, my response would be, I’ve recently used… can I click more than one. [she clicked p9/11 and mgib and started answering questions] [?] I’ll look into any money, any free money out there possible.

A: [?]

P: [?]

A: [explained our testing purpose, making sure ineligible people aren’t applying as much] I didn’t want you to think that you were doing to something wrong when you were going through it

P: there’s still a good chance they’re going to apply for it. It’s like fishing, even if you have to cast 1000 times, there’s still that one chance… another thing is, if they’re not eliglbible, they’re not able to hit submit. Or put in an extra step there that they have to call and they have to be told personally that, no they don’t qualify.

A: that’s a great idea. For our work, we can’t do the piece where they can’t submit. We can’t do the determination. I like your suggestion, to be able to call, to have a chat button.

*When eligibility alert appears*

* What did you think of the eligibility alert message you saw? Would you still apply?

*When 2nd (STEM) eligibility summary page appears*

* What are your thoughts on seeing this information again?
* What would you do at this point?

Things to watch for:

* Does the user read the subway map?
* Does the user experience any confusion in determining how to start the application? (Need to scroll to bottom of page)
* How does the user react to the eligibility alert message (wrong benefit)?
* How does the user react to the 2nd ineligibility alert message?

**Upon completion of task**

* In your personal field of study, would you expect to be eligible for this scholarship?
* In terms of applying for this scholarship, on a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task?

**TASK 3: Authenticated User in non-STEM program - 15 minutes**

We're going to do some role playing. Let's say you're Jordan Johnson and you're using the **Post 9/11 GI Bill** to obtain an undergraduate degree in **Philosophy** from **Chicago State University**. How would you go about filling out this application? You will log in as an authenticated user.

*When eligibility alert appears*

* What did you think of the eligibility alert message you saw? Would you still apply?

Things to watch for:

* + Does the user read the subway map?
  + Does the user experience any confusion in determining how to start the application? (Need to scroll to bottom of page)
  + Does the user check the Approved STEM programs document?
  + How does the user react to ineligibility alert?
  + If they click "Check remaining benefits", what would you expect to happen (e.g. modal, new page, etc.)?

**Upon completion of task:**

* In your personal field of study, would you expect to be eligible for this scholarship?
* In terms of applying for this scholarship, on a scale of 1 to 5 where 1 is very hard and 5 is very easy, how would you rate this task?

**Post-Task Interview - 10 minutes**

Circle back on

* School contact details - Is your school ID the same as your SSN? If applicable, what would you put down for your school email?

Those are all the tasks I have for you today.

* Do you have general thoughts or feedback on the application that you’d like to share?
* Any questions for me?
* 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!