**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: Yes.

* + Which benefit?

P: I’ve used the VocRehab. I’ve used several of them. I can’t remember all the names of them.

1. Do you know roughly how much of your education entitlement you have left?

P: I think I have 9 months left. I should have enough to get me up to where I’m going to be ok. Depends on what this virus does to these schools. It’s killing us.

A: which benefit do you have 9 months left on?

P: I think it’s my GI, yeah. VocRehab is just about used up. I’m about to run out of Yellow Ribbon, I think is what it is.

A: are you currently going to school?

P: yes.

A: what are you studying?

P: paralegal studies. My goal is to be a [?].

1. Are you familiar with the Rogers STEM scholarship?

P: I’ve heard of that, but I haven’t gotten a lot of the details. Ever since the coronavirus, everything fell off the grid. It’s like we’re in no-mans land.

* If yes, what have you heard about it?

P: I remember there was something about technology, lord don’t quote me on that. It was going to pay your education if you’re in a field that’s high demand. I could be wrong.

A: there’s another one, too, vet tec, and it sounds like it might be part of what you’re remembering, too.

* 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.

P: Hmm! Ok, that’s news to me.

A: [explained vet tec to him]

P: I wonder why the va reqs don’t say anything about this. Is it because it’s new?

A: it’s pretty new, yeah.

P: as a veteran, when we go to universities, they give us an idea of where to go because a lot of us are half lost anyways. Some of these college va reps it’s like they get sent information. it’s like we never get the information that we need.

A: that’s helpful. Good to know where you’re getting your information.

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: well, the first thing I would do is I would go to one of the reps. What blows my mind is that it says here, to get help with the claim, you can go to a veterans service office. If I need filling out my application, it says your school certifying official, that doesn’t sound right. I can say the vso is not going to have any idea of what this is about because they mainly deal with claims, health benefits, pension. When it comes to education, the first thing that comes out of their mouth is [?]. when it comes to school certifying official, it should say see your [?].

A: alright, that’s helpful. Do you think what it says under step 2, you have what you need to start your application?

P: it says Social security number, bank account information. I don’t know why they would be asking that if the va should already have it. That would be a concern. Information about your school, that’s kinda misleading there because you’re going to use your va rep at the school, they should be able to do all that for us because then you have to worry about if you’re getting the wrong information. I know it puts a lot of pressure on these va reps, but that’s what they’re there for.

A: ok

P: the reason why I say that is because if I was trying to go to a doctor to fix my stomach problems, I’m not going to go to a bone doctor to fix my bones. That’s all these reps do is education. If you run into a pickle, they should be able to help you figure out how to fix it. If you have a claim problem, well yeah the vso is going to help assist you to a certain degree.

A: that’s super helpful. We’re going to make a note of that. [?]

P: if we didn’t have a va rep, I think it restricts us if you’re not computer literate. There’s not a phone number that you can call. It would help if you could call someone up and say hey, can you help me filil out the application…I’m not too compatible with the computer.

A: ok. Let’s say you had talked to the school rep and they said, this is a pretty easy form to fill out. Why don’t you get started and see if you have any questions on it and come back to it. How would you go about getting started filling out this application?

P: from my experience with our va reps, they’ll say, hey it’ll take about 20 minutes to fill this out. They’ll click on it and run right through it, which is very beneficial because if you have someone that’s been doing it quite frequently, it makes life so much easier for us. Otherwise, I’m not going to do it. I hate to say that because I see it all the time.

A: let’s try this. Let’s pretend that I’m the va rep and I’ll help you fill it out. Maybe you called me up and said, hey, amy. I’ve started to fill out this application and I said, hey let’s screenshare and I’ll talk you through any questions that you have. Now we’re at step 2 and we have this information. let’s keep going and if you have any questions I’ll help you out.

P: I think right here the start your application without signing in, that needs to come up to where it says apply instead of being down here. If it were right there, it would be a lot better. A lot of people aren’t going to look. They’re going to look at apply, and it’s like it’s left blank to them. It says complete this education form. Well, where’s the form? For me, I would give up.

A: so that’s one thing we’d want to do, is think about that location. So what next?

P: once I figured out how to get started on the application, I would make a phone call, can you mail me one? It would be beyond my understanding, my comfortability, but I would click on it and see where it took me.

A: do you see where you would click right now?

P: yeah, it’s right here, under sign in or create an account. It’s in a bad place. [?]

A: ok, let’s go ahead and click on start the application. So I’m controlling the screen right now so you know.

P: I was wondering…Looks like it has a mind of its own again!

A: what would you do?

P: it’s asking for my ssn which is no big deal. Then on the next page, they’ll fill all that out. They know already where you’re at, at least mine does.

A: and we said Jamie lee was mongtomery gi bill

P: yes, ma’am. [he clicked that and then continued to ineligibitly page]

A: alright.

P: right, and this is why it pays to have that rep because the rep’s going to know that. He or she is going to say, I’m sorry but you’re not going to be able to meet the criteria, but maybe there’s something else out there, see if we can help you out.

A: if you were completing the application on your own, would you still want to apply?

P:I if i was by myself and I got that, I’d say screw it right there. this is going to give me a hard time, so why even do it? [?] I don’t know the additional resources that are available to me, so these reps can help out, and I hope they stay there.

A: how would you quit this application?

P: I would click no

A: and then what would you do?

P: exit this application, if I was by myself. If my rep was with me, I wouldn’t even be right here. They’d know what to do.

A: excellent. If you clicked the exit button, where do you think that would take you?

P: I don’t know. Probably the trashcan.

A: do you think it would take you somewhere on the va website?

P: you’re dealing with the va, so lord knows what it’s going to do. If you don’t have a school rep, you’re just shooting yourself in the foot.

A: let’s see where this goes today. So yeah it did go to a va website

P: yeah, see.

A: what do you think about that, about landing on this page when you exit the application?

P: my opinion is that you’ve got to go to these representation people and find you a good one, and this is what I tell people. You’ve got to find one that’s going to work with you and for ya… they will be able to give you an insider to where that’s going to work. This website won’t give you the ins and outs like an individual would because they work with this day in and day out. [?]

A: alright, I appreciate that information. that was the task that we wanted you to try out today. You did exactly what we were hoping when you got to that alert. You bailed. That’s what we wanted you to do.

J: who do you call when you want to talk to a rep?

P: [?] if I was a brand new veteran, the first thing I would do is ask, where’s the rep?

C: [asked about his idea of good vs. bad reps]

P: [mentioned the good reps tend to be veterans]

*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!