**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: I have

* + Which benefit?

P: It was post-9/11

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

P: I believe I have about 13, 14 months left.

A: what were you studying?

P: I studied computer science management. I was a computer science major

A: did you complete that degree?

P: I did, so I’m considering using the remainder of the gi bill benefits for grad school.

1. Are you familiar with the Rogers STEM scholarship?

P: no, actually, I have not.

* 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.

P: ok

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.

P: ok, so for this page, [started reading steps] I feel like determine eligibility should be above applying portion. If I apply and find out I’m not eligible, it defeats the portion. I prefer seeing the eligibility portion above the application part. Ok. so is this connected to other va programs, like va.gov or va health? I don’t know if it’s connected. If it is, it’d be nice because sometimes it’s frustrating to memorize all passwords and id... If this is connected to that, it would make life much easier. [kept reading requirements] [clicked on approved programs pdf and started scrolling down] wow, there are a lot of specific degrees.

A: this is quite a list

P: yes, 25 pages seems very overwhelming. If you could trim it down to see certain subjects, that would be easier. 25 pages seems like a lot. So [?] is also covered, but it doesn’t say anything about stem. But maybe having that information up front would help. [clicked on stem info page link] ok. Could you bring me back to the application page?

A: Mmh

P: when I right clicked this link, it didn’t have “open browser” or different options like that. That should be fixed.

A: you usually right click?

P: yes because I want to have all the information open in front of me. It seems these links don’t have the option to open a different browser.

A: it might be a prototype issue. We’ll check into that.

P: so for information about the school, what are you guys looking for?

A: what do you think?

P: I’m guessing it’s basically information about [?]. it’s better to have that now instead of starting later. Another question is, actually never mind. If the person is already receiving a payment from the va, is this information going to be automatically transferred to this application from the va system or is this something I’ll have to prepare separately because the va basically has my banking information?

A: that’s a good question. Ideally, it’d be able to pull it. I think for this application, you’ll have to add it in.

P: [clicked on check your remaining benefits] ok yeah, it says sign in with your ds logon. That’s what I was looking for. That’s what I use when I’m logging into va. There’s no specification of whether it can be online class or could it be a hybrid. Is there any requirements? If there is, it’d be very helpful as well. Ok, could you take me back?

A: Mmh. Just one second. [asked him to click tab]

P: oh, ok. So when you say, by mail, are you talking about email or actual mail.

A: actual mail.

P: ok. What is this respondent burden?

A: that is the estimate of how long it should take you to complete the form

P: the control number is?

A: the office of management budget number. They know we’re asking this information.

P: is it really needed for students to see that?

A: it isn’t necessary for you to know for this application, but it’s a federal requirement for when government agencies are asking for information, to have this.

P: sounds good.

A: so when you feel that you have the information that you need to get started, we’re going to have you sign in and create the account path.

P: ok, I’ll sign in.

A: for this one, since you’re Sammy smith, we’ll automatically authenticate you.

P: [signed in and got to intro page with entitlement alert, started reading it] oh, ok. Ok. so, I guess for the requirement, I have one month. It says you may not be eligible. If I have less than 6 months, would it change it to something else or stay the same?

A: what do you think would happen?

P: I’m not sure if I should apply or not. According to the requirements, I don’t meet the standards, but then it says “you may not”. It seems there’s still a chance for me to be approved. If I have more than 6 months, it shouldn’t allow me to do it. If it’s not flexible, then this shouldn’t be here at all. They should word it more clearly.

A: where?

P: it should just say, you’re not eligible. And since it gives me the reason at the bottom, I would know the reason at the time. It should just say, you’re not eligible instead of you may not be eligible. According to the standard, I am not eligible. If there’s a chance that you may not be approved, I think. Just click? [clicked start button]

A: so you think you would still go ahead and apply?

P: yeah because it says I may not be. Free money is definitely worth trying, at least.

A: ok

P: [started filling out form] if I click the finish the application later…I guess I cannot click.

A: because this is the prototype you can’t click

P: if I click continue I go to the next screen?

a: [?]

P: what is fry scholarship? I guess I don’t use it [clicked on its learn more and went back to benefits q after seeing page] ok. [started answering stem q’s] so if I’m not currently enrolled, but interested in enrolling, should I say yes or no?

A: so sammy’s working on this degree in chemistry

P: [clicked continue after stem page] ok, so I have to fill it out to find out I’m not eligible [saw warning on summary page and started reading contents] so, even though I know I’m not eligible for this scholarship, the system lets me apply for it anyway? It doesn’t make sense. It says this may delay the process for others who are eligible. I shouldn’t be allowed to submit this anyway. This is a waste of time for me and for people who are reviewing this process. Is there anything I’m gaining on this? Is there a possibility of me still obtaining the scholarship if I say yes on this?

A: what are your thoughts?

P: because I have the option to apply, it looks like I have a chance still even if I’m not eligible. If I’m not eligible, then you shouldn’t give me the choice.

A: one thing as we’re thinking as we’re building this form, if there’s an issue with the system, we would not want that to deter someone who knew that they were eligible. This is a system where the form itself cannot make the determination of the eligibility. It is between the veteran and the people who look at the applications

P: the time that I have left to use is being pulled from my VA profile right? Which means if I’m applying to this, if I’m logging into va.gov, I should be able to see this information. I don’t think there’s going to be many people who are going to apply knowing they’re not qualified. I don’t think having this option of picking yes or no is necessary. If the system determines I’m not eligible, I think it’s nice to know that I’m not eligible before I start the process, but it makes sense in case there’s a system glitch that I’m still able to apply. If I’m having a choice. If I knew I wasn’t going to qualify, I would not waste my time on this.

A: if you clicked on exit application, where do you think that would take you?

P: probably va.gov. so for a while, that was a little confusing. I had to go on to eBenefits. I don’t know if they fixed that process.

A: great! That was what we wanted to test out today! Perfect!

C: knowing that you’re not eligible for the scholarship, what do you think would happen if you still applied anyways? [thought VA would send him a denial letter in the mail. Was adamant that either you’re eligible or you’re not, so “you may not be eligible” is not accurate]

C: you mentioned that you thought the exit application button would take you to the va.gov homepage. what are your thoughts on being taken to this page instead? [ he thought it was a great option, as he could look for other education benefits]

*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?

*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!