**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 used them before, yeah. I took them all the way to a master’s degree.

* + Which benefit?

P: Montgomery GI Bill.

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

P: Yeah, I think I have two years left of GI Bill. I kept a year and I gave a year to my wife.

1. Are you familiar with the Rogers STEM scholarship?

P: No, I’m not really familiar with that.

* If yes, what have you heard about it?

P:

* 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.

P:

*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:

*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.

P: Do I need to sign in?

A: yes, we would like you to sign in as an authenticated user.

P: so sign in using my va health net?

A: [mentioned this is a prototype]

P: [wanted screen to be bigger] [started reading requirements once he got control] …have used all your education benefits…alright, so fill out application, social security number…certifying school official…complete the education benefits form…you can print this page for your records…we’ll let you know by mail…[after reading all steps] so start the application, I supposed. Ok, 1 of 6. So there’s my name, Jordan Johnson, my social. And continue. [benefits page now] so I’m using my post 9/11 you said?

A: yeah, post 9/11.

P: alright. [continued to stem q’s][said yes to 1st stem Q and clicked continue]

A: before you click continue, the degree we gave you is philosophy. Are you sure philosophy is a stem program?

P: no, I don’t think it is at all. I shouldn’t have clicked that. Should I go back?

A: yeah

P: ok. Let me see if this back arrow will…[lost audio] ok, I’m back now. It took me all the way back to the zoom page. I hit the wrong back button.

A: let me pop you back to remote control, too. Hang on a sec.

P: every time I try to go back, it takes me back to the zoom page. I hit the one right here…

A: [tried giving him control again]

P: are you enrolled in science, technology… so that would be no. ok, now then, let’s go back down here to try to do this right. Do you have a stem undergraduate degree? That would be no. I still have more than 6 months.

A: we’re going to say we have less than 6 months.

P: less than 6. I didn’t know if I was supposed to use my own information or not. Ok, so it appears you’re not eligible. Ok, I’m not enrolled in a stem. I haven’t used all my education, but Jordan has. Would you still like to apply? I guess I’d still like to apply, if that’s what Jordan is supposed to be doing.

A: talk to me a little bit at this point why you would still want to apply

P: I wouldn’t. I’m sorry. I need to think like Jordan. If Jordan is studying philosophy, he doesn’t need to go for a stem program because he knows he wouldn’t get it. I guess I would say no, and exit the application, I guess that’s fair.

A: I guess. Where do you think you’d end up?

P: probably some page that says, have a nice day.

A: can you tell me a little bit about the eligibility at this point

P: jordan’s going to try whatever he can. He’s going to make someone else make the final decision. What harm would it be to try? So I’d try and continue. Ok. we’re going to keep going. We have prefilled some of the school information. what’s the name of your stem degree? You said I was going into psychology?

A: philosophy

P: I don’t even know how to spell philosophy. [a told him it would prefill]. Do I have a school student id number?

A: that’ll fill in.

P: alright, your school email address? [went to amu and then branston [?] university for master’s] [his school id was not his ssn]

A: ok. Alright. Sorry to stop you there.

P: so I should go ahead and continue? I’m moving right along. Page 4 of 6, military details. Is Jordan active duty? Because I am not. I’m retired. I don’t think you told me that detail.

A: I did not

P: [kept filling out form, contact details] page 5, direct deposit. Ok, account type. Routing number. So that’s it! Last page, review information. I think we did it all accurately, so I don’t think we need to check much. I would check each page before continuing anyways. Privacy policy. I’d check that and then submit the application. [would print confirmation]

A: would you do that on your personal laptop or take a screenshot?

P: [would save it as a screenshot or print it] I like keeping records.

A: what did you think about that process?

P: it was simple. It was relatively simple to do. There was no information I didn’t know, and it was helpful along the way. You gave examples, especially on the routing numbers [direct deposit page], and it was helpful!

A: what was your program of study?

P: homeland security

A: do you think your program would qualify?

P: probably not. Maybe… I don’t think my degree in homeland security would qualify because it’s not math, science.

A: if you weren’t sure whether philosophy was a stem degree or not, how would you figure that out?

P: I’m not sure. I guess I don’t know the answer to that. [would talk to someone at va]

A: who, specifically, would you be looking to talk with?

P: whoever works in the education office [?]

A: would you contact the main va, or the regional office?

P: I’d go to my local va right here, absolutely.

[?]

*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!