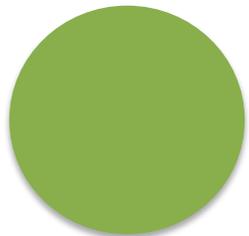


CalSAWS | Usability Testing – Round 1 Results Report



December 21, 2020

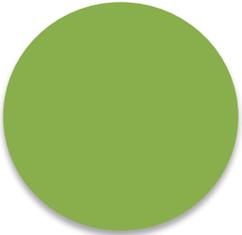
“Want your users to fall in love with your designs? Fall in love with your users.”

- Dana Chisnell, pioneer and thought leader in civic design.

During usability testing, we spoke with customers and CBO/FBOs. **They talked while we listened and observed.** This report summarizes what we learned during our first round of usability testing, and how it benefits the users of BenefitsCal.

Agenda

- ⑤ Executive Summary
- ⑦ Why do we conduct usability testing?
- ⑨ How did we conduct usability testing?
- ⑬ Who did we talk to?
- ⑮ What did we learn?
- ⑳ What we've addressed based on usability results



Executive Summary

Executive Summary

DRAFT

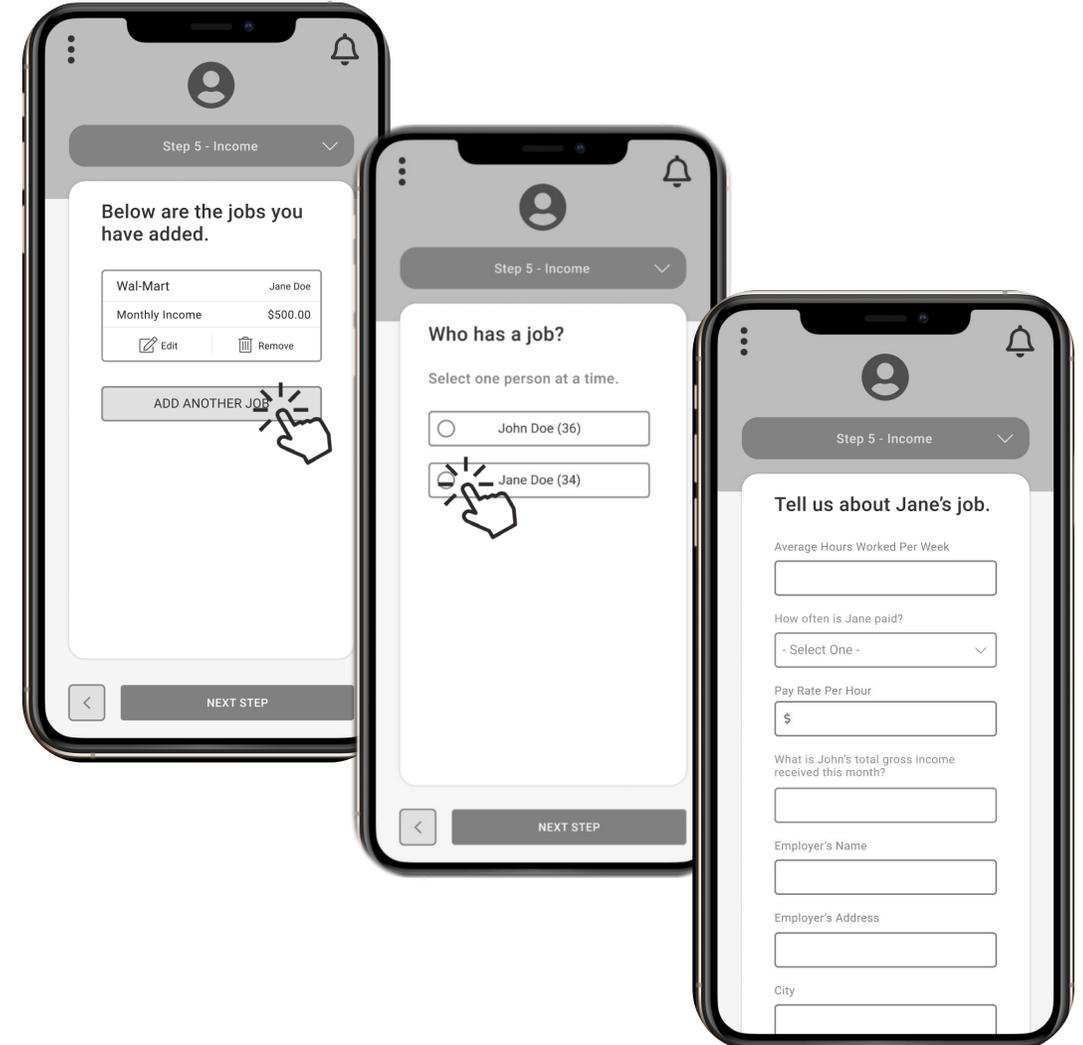
Usability testing is a user-centered design technique utilized to gather user input on design concepts.

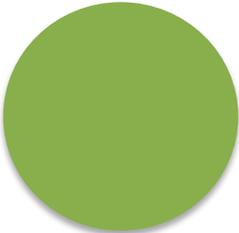
To confirm the usability of design concepts for BenefitsCal, the team conducted a series of evaluative research activities.

Customers and CBO/FBO assisters and managers were invited to test high-impact flows. They took control of the mobile wireframe prototypes; navigating the prototype on their own, while sharing their thoughts. We observed how they interacted with the designs and formulated recommendations for design improvements or adjustments.

This research was conducted during the General Systems Design phase. Further usability testing will continue throughout the upcoming project phases.

This report includes a summary of what we learned, key success areas, and areas of improvement.





Usability Results Report: Round 1

**Why do we
conduct
usability testing?**



Objectives and Goals

Usability testing challenges our assumptions and design concepts. We let the user take control and think out loud to share real-time feedback, early in the application lifecycle.



DEEPEN UNDERSTANDING OF CALIFORNIA'S BENEFITS USERS

- Deepen our empathy for **California's residents and CBOs/FBOs** when using websites to apply for or manage benefits.
- **Discover barriers** associated with applying for and managing benefits.



RECOGNIZE KEY STRENGTHS

- Identify **what's working and how these strengths could be further improved** to better meet the needs and expectations of the users.
- Select **patterns, or design elements, that enable users to easily find the information they need** and lower barriers to the benefits process.



IDENTIFY OPPORTUNITY AREAS

- Pinpoint **usability challenges** within the user interface and content areas to continuously improve the designs.
- Identify and prioritize **opportunity areas to mitigate potential drop-off** from BenefitsCal.



ESTABLISH METRICS

- Collect **qualitative** (observational findings, emotions, and human behaviors) **and quantitative** (task completion rate of each scenario) metrics **to determine user satisfaction.**



How did we conduct usability testing?

We used virtual evaluative research activities via Zoom to conduct usability testing.

METHOD

We used a **cognitive walkthrough method** in order to evaluate the usability and performance of a particular design concept.

- The moderator presented a design concept and asked participants to complete a task while talking through their actions, asking questions and engaging with the concept.
- We evaluated what worked well and what should be improved in a specific design or flow based on feedback and observable interactions.

FORMAT

Individual, cognitive walkthroughs were conducted with participants using a **clickable, mobile prototype shown on Zoom**.

- The prototype allowed the participant to click through each of the flows on their own.
- A data logger documented each task and captured qualitative data, including their challenges, ideas, and successes.

ROLES

Moderator

- Guided participant
- Responded to participant's questions

Participant

- Performed task activities
- Provided verbal feedback as task **was** performed

Greeter/Data Logger

- Provided overview of study to participant
- Recorded participant's actions, errors, preferences, and comments

ETHICS

We are adhering to the following ethics guidelines:

- A participant's performance will not be attributed to that individual.
- A participant's name will not be used outside of the test.

The scenarios that were chosen for this round were based on the following criteria:

- **Focus on high touch, high frequency processes**
- **Break up flows into bite-sized chunks to avoid participant fatigue**
- **Keep testing durations to about 1 hour to be respectful of participant's time**
- **Use experience from existing systems and prior usability testing to inform areas where we have seen the most customer confusion or struggle**
- **Gather feedback from customers on design concepts or hypotheses, such as one question per screen vs. many, or mobile design vs. desktop**

Scenario Breakdown

We conducted tests based on roles (customer and CBO/FBO) through the following scenarios.

CUSTOMER SCENARIOS

Questionnaire

Capture demographic data including county, age, education, benefits received, comfort with technology, and experience using the website.

Apply for Benefits Income

Navigate through the income flow and understand what questions are being asked while people are applying for benefits.

Apply for Benefits Expenses

Navigate through the expenses flow and understand what questions are being asked while people are applying for benefits.

Report a Change

Report a change to a case information using two different flows and capture the customer's preferences.

Document Upload

Upload verification documents.

Create An Account

Capture user preferences with email requirements, password masking, security questions, and email verification while creating an account.

CBO/FBO SCENARIOS

Questionnaire

Capture demographic data including county, age, education, organization size, comfort with technology, and experience using the website.

Dashboard Overview

Capture home page and dashboard screen use, the ability to navigate or resume an application, and view reports.

Document Upload

Upload verification documents.

Apply for Benefits Expenses

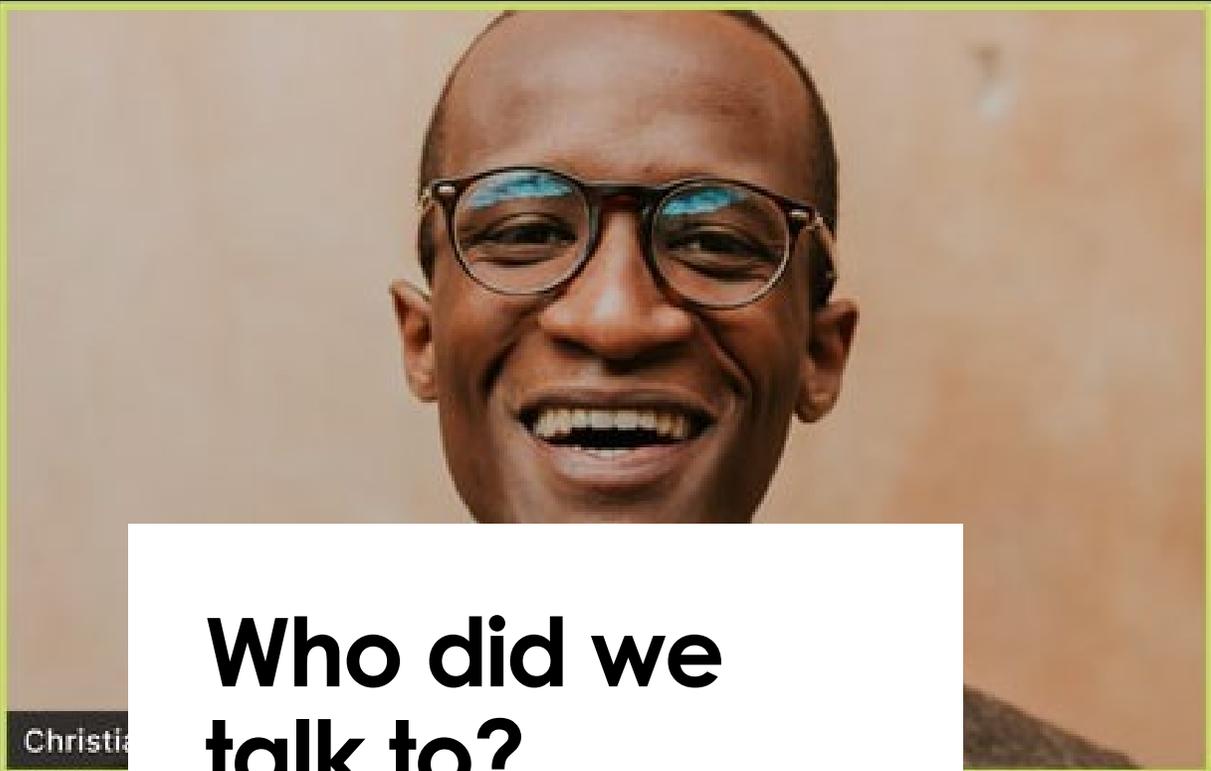
Assist a customer with the income flow while applying for benefits.

Apply for Benefits Income

Assist a customer with the expenses flow while applying for benefits.

Create An Account

Capture user preferences with password masking and security questions while creating an account.



Christia

**Who did we
talk to?**



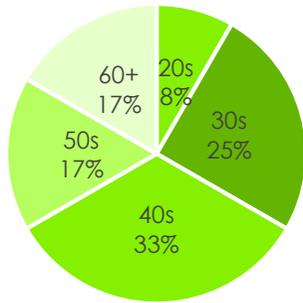
Sincerely Media

Participants

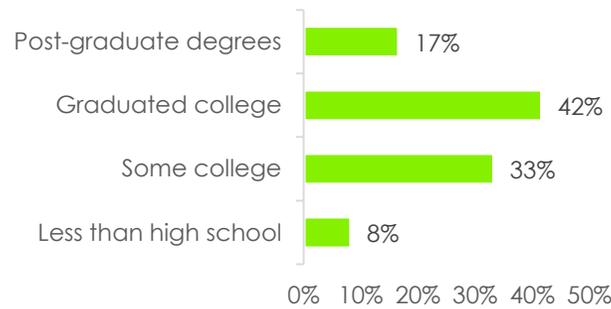
We conducted 18 one-on-one interviews for usability testing with users.

11 Customers and 1 County Worker

Age Ranges



Education Levels



Counties Represented

- Los Angeles (3)
- Orange (1)
- Riverside (1)
- San Bernardino (1)
- San Diego (4)
- Santa Clara (1)
- Solano (1)

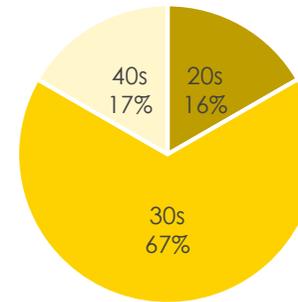
Languages Included

- English (8)
- Russian (2)
- Dari (1)
- Farsi (1)

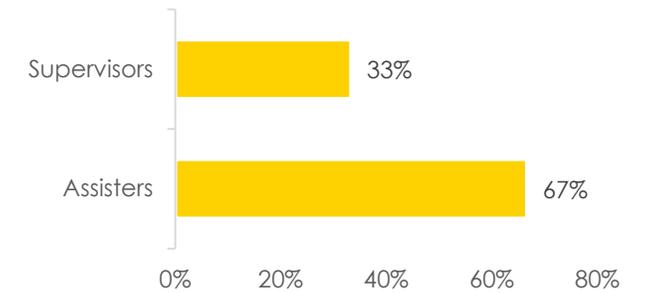
Customers were identified from CBO referrals and Customer Survey volunteers. All customers were currently receiving benefits and had used one of the existing state portals or other systems to apply for and/or manage their benefits. We identified one county worker that helped give feedback on Customer screens.

6 CBO/FBOs

Age Ranges



CBO/FBO Roles



Counties Represented

- Sacramento (1)
- San Mateo (1)
- Santa Clara (3)
- San Diego (1)

CBO/FBOs were identified from volunteers within the Advocate community, Santa Clara County, and Catholic Charities. Most CBO/FBOs used one of the existing SAWS portals or other systems to apply for and/or manage their benefits.



What did we learn?

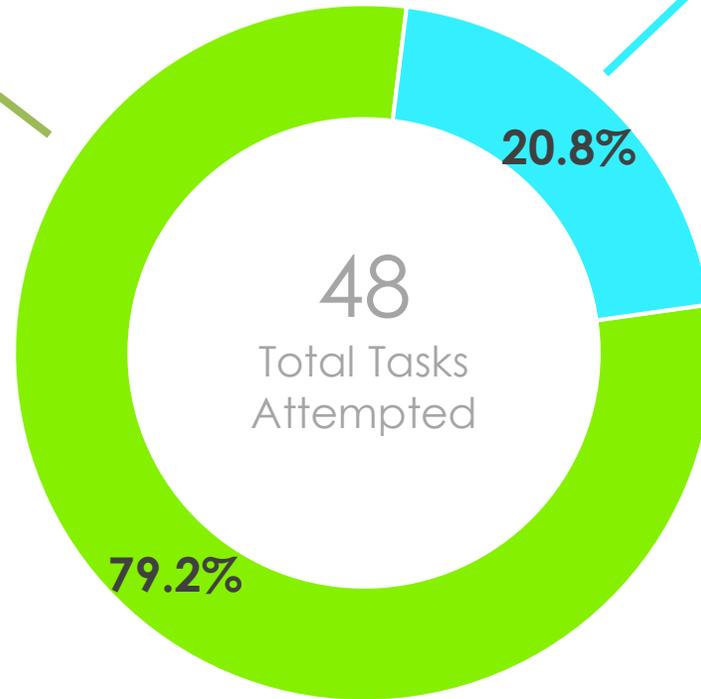
Customer Usability Test Results

Customers were evaluated while completing tasks.

Results Overview

79%
SUCCESS RATE

We conducted 12 one-on-one interviews which included 11 customer and 1 county worker participants. The scenarios included Apply for Benefits Income, Apply for Benefits Expenses, Report a Change, Document Upload, and Create An Account.



BLOCKING ERROR RATE *

3 types of errors contributed to the 20.8% error rate, all of which have been addressed by the Design Team.

Income (Gatepost) - 8 Customers were unaware that they could scroll down to move on to the next page.



Expenses (Getting started) - 1 Customer was unclear they needed to enter bills in this section.



Income (Gatepost) - 1 Customer did not know how to answer because the wording of the question was too generic.



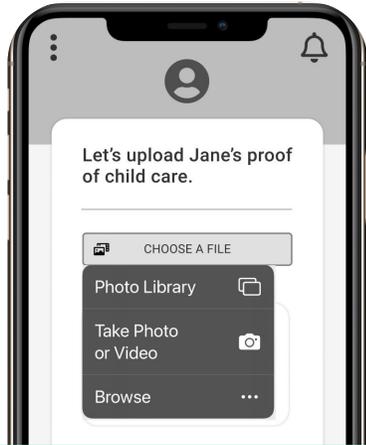
* When an error was made on any part of a task, the entire task was coded as unsuccessful. Error rate = Number of tasks with a blocking error / Total number of tasks tested.

Highlights for Success – Customer

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Below is a summary of some of what's working for customers.

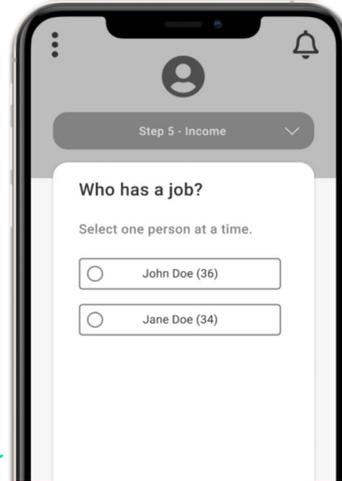
Mobile Preference



You sold me on the document upload, that was the best part. It was very fast and very easy to do... Yeah of course I would rather do it on my phone, but I do it on my computer because when I do have to upload a document it's usually not this easy or fast.

Customers liked that the **simple and easily navigable interface** would enable them to use their mobile devices to **manage their benefits on-the-go**.

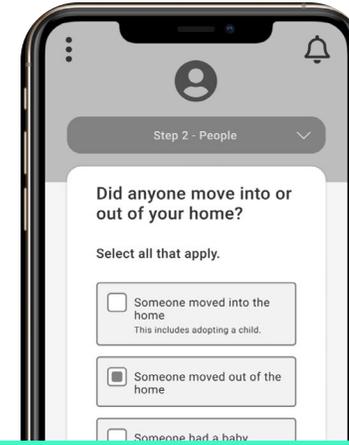
One Question Per Screen



I like everything it really explained everything nicely and everything is big and readable pretty much.

Having **one question per screen** and the overall flow of the application pleased participants since they can **focus on one topic before moving on to the next**.

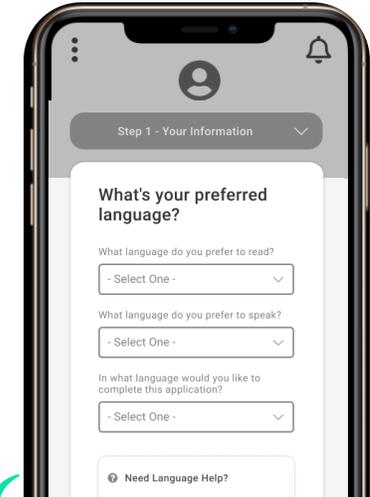
Simple Language



I think you guys have simplified which is useful to the population that we serve, so I think it is good to have it where the client can figure it out on their own... I think the language is simple so they can understand it.

Straightforward, clearly asked questions made the application feel more **conversational and user-friendly** for participants.

Using Own Language



I feel like I can do it on the app myself if you change the language to Farsi.

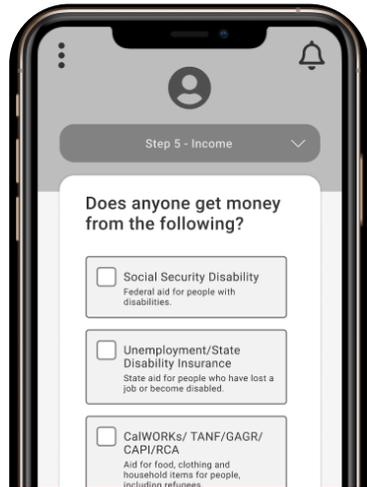
Customers **preferred being able to use the app in their primary language** so that they can understand application questions and answer choices more clearly.

Highlights for Success – Customer (Continued)

DRAFT

Below is a summary of some of what's working for customers.

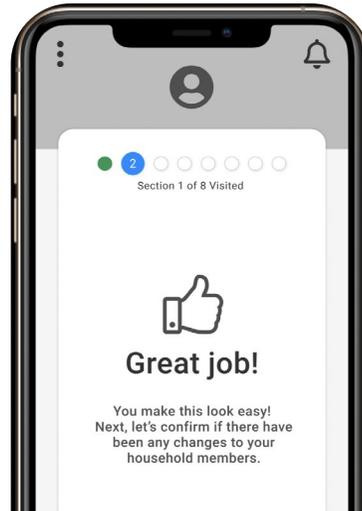
Descriptions Under Options



That's good that there is a description. On the other [apps] I've seen it doesn't give you a description. You kind of just have to know.

Small descriptions under each option that give **examples of items that fit within each category** led to greater user task completion and success.

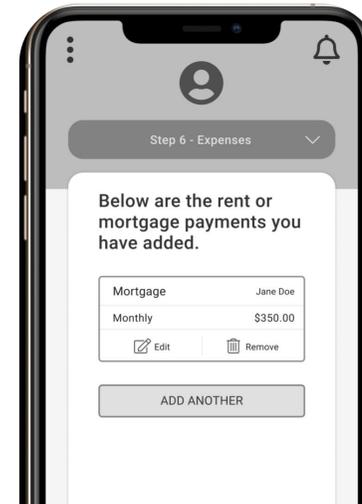
End Pages



This is very good right here it is very friendly to me I feel like we're both on the same page, so I like that.

Positive ending screens for application sections that provide the **option to 'save and exit'** were welcomed by participants as both helpful and empathetic.

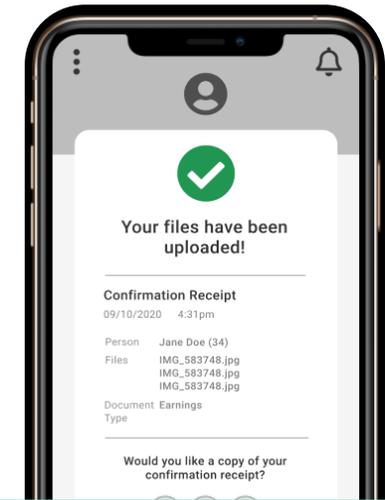
Recap Screens



It's very clear, it's going to make sure you know what you are doing. Can't be mistaken. Even seeing this little phone on my phone it's very clear.

Quick recap screens that show participants the information they just entered **gives them confidence** they are entering the correct information.

Confirmation Receipts



I like that, I like it. This is what I wanted. I wanted it to say here is your confirmation, here is your receipt, this is what we received. And I like how it says if you want a copy of this here you go.

Confirmation receipts for reporting a change and document upload were **given positive feedback**.

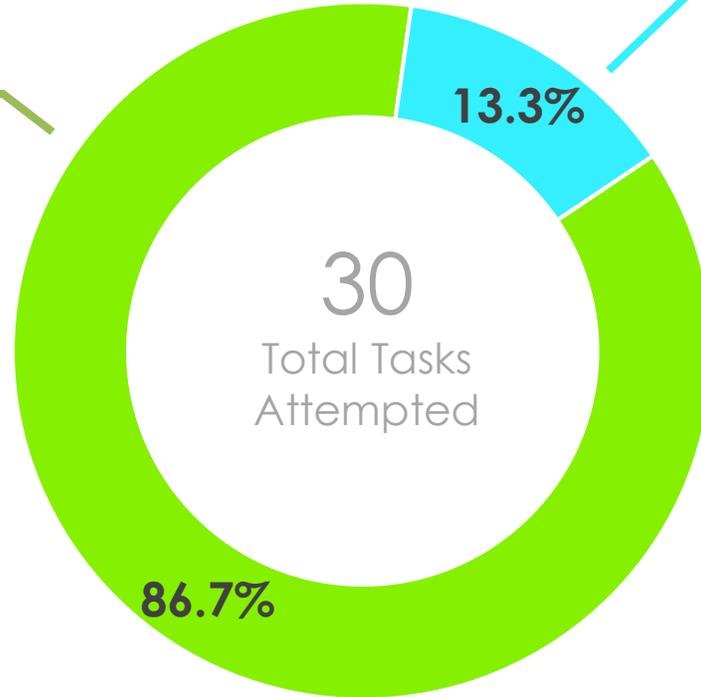
CBO/FBO Usability Test Results

CBO/FBO assisters and managers were evaluated while completing tasks.

Results Overview

87%
SUCCESS RATE

We conducted 6 one-on-one interviews which CBO/FBO participants. The scenarios included a Dashboard Overview, Document Upload, Apply for Benefits Income, Apply for Benefits Expenses, and Create An Account.



BLOCKING ERROR RATE *

2 types of errors contributed to the 13.3% error rate, both of which have been addressed by the Design Team.

Dashboard Overview - 3 CBOs did not know to navigate to the Dashboard in order to view reports, resume an application, or upload a document.



Income (Gatepost) - 1 CBO did not know to click on "Other Income" before proceeding.

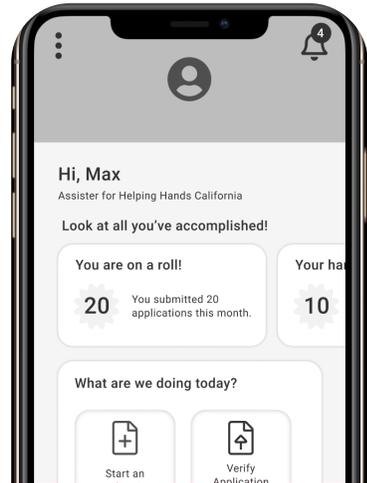


* When an error was made on any part of a task, the entire task was coded as unsuccessful. Error rate = Number of tasks with an error / Total number of tasks tested.

Highlights for Success – CBO/FBO

Below is a summary of some of what's working for CBO/FBOs.

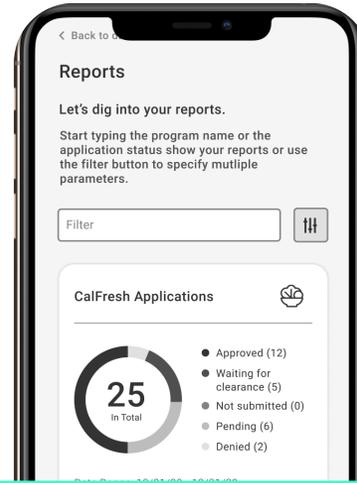
CBO/FBO Dashboard



“It's cool that you see the accomplishments and stats at the top. Wow, this is really good. It's definitely helpful for people to know what they've done.”

The Account Homepage allows CBO/FBOs to immediately **view key accomplishments and important action items**, which excited participants.

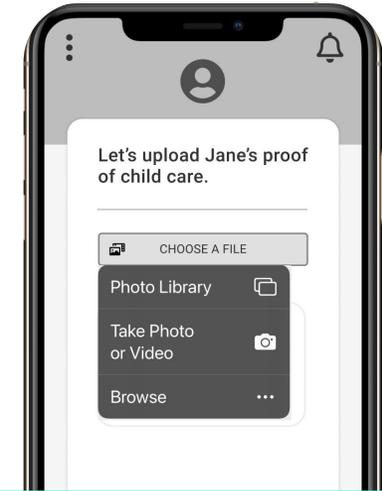
Viewing Reports



“Having stats on my reports would be great so I don't have to look up these numbers manually or have to ask the county to send us numbers all the time.”

The Reports page functionality that allows CBO/FBOs to **view the application status across programs and filter by a variety of categories** was a feature that participants found highly favorable.

Document Upload



“Using the document upload would be nice because it turns a 2-step system into a 1-step system. We would not have to send it to an email and they have to open the email anymore.”

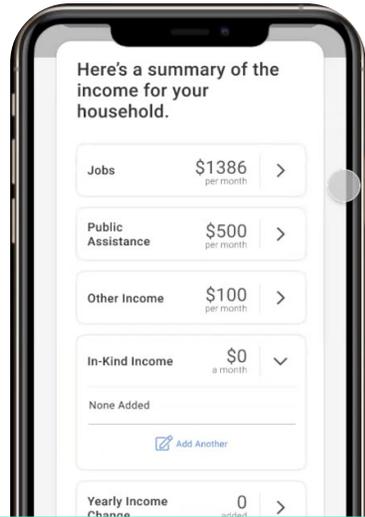
The Document Upload screens allows CBO/FBOs to **quickly take and upload photos for verifications** related to their customers' cases, **increasing efficiency**.

Highlights for Success – CBO/FBO (Continued)

DRAFT

Below is a summary of some of what's working for CBO/FBOs.

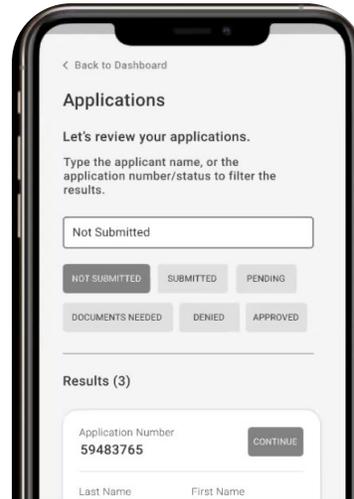
Editing from the Summary Screen



This section is really helpful to view what's been done so I can quickly go back and make changes as needed.

The Summary Screens allow participants to **quickly see the information they entered and make changes as needed.**

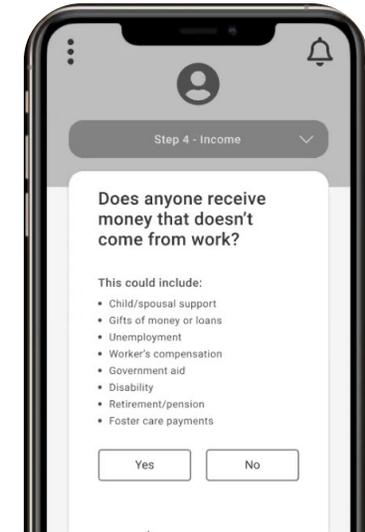
Continuing Old Applications



I love the Application Summary and being able to continue my applications. This is definitely something I would use.

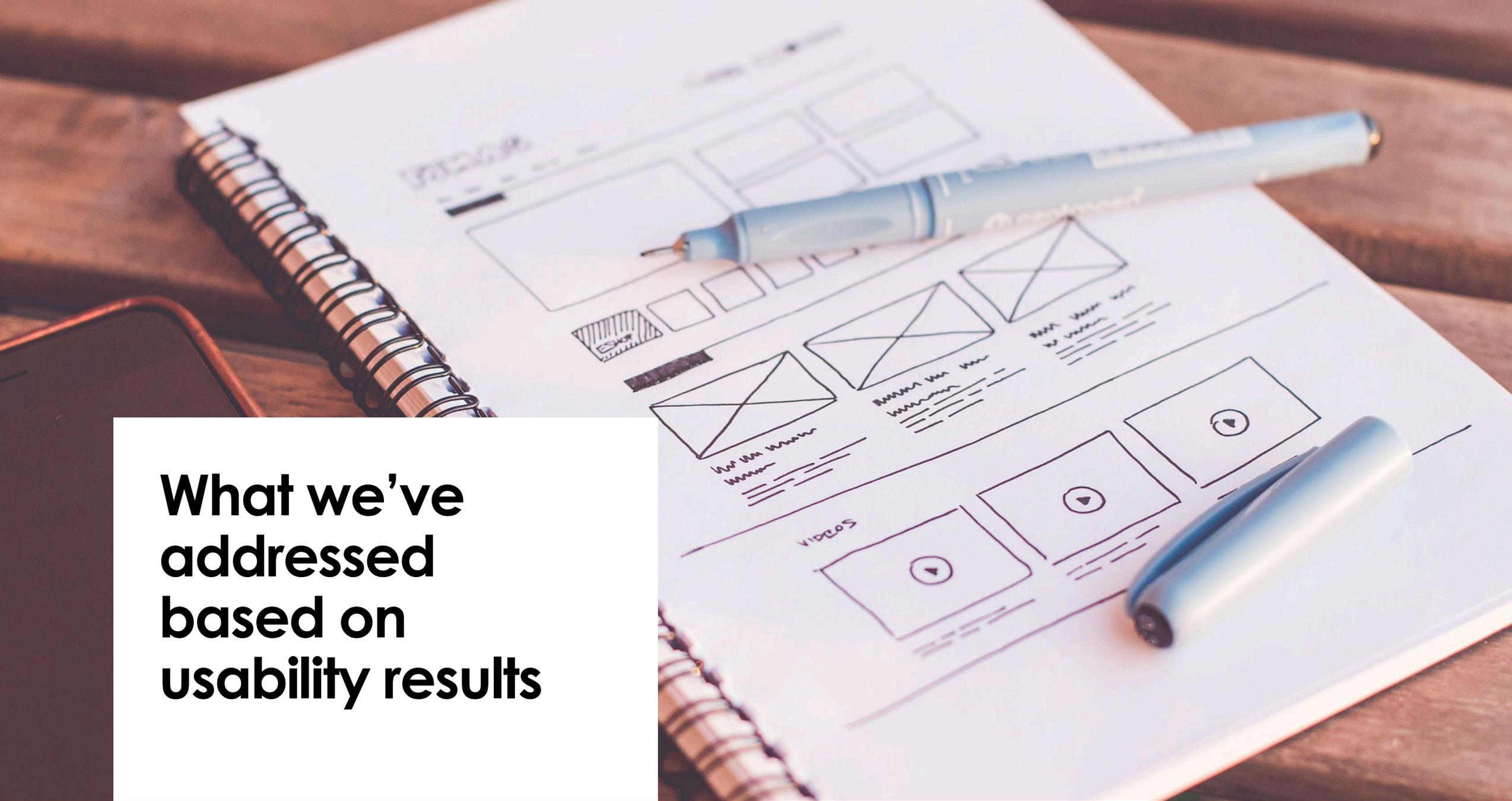
The ability to **continue old applications** enables participants to quickly **navigate to unfinished applications and follow-up** with applicants when necessary.

Navigation Buttons



It's really nice to have a back button because GetCalFresh does not have a back button.

The application has **clear navigation buttons** throughout the process, including a **back button to quickly correct any misinformation entered.**



What we've addressed based on usability results



We “**Heard it from the Lab**”.

While we received many positive responses, we are committed to continuously improving BenefitsCal based on user feedback and testing.

Insights Prioritization Criteria: Severity

We prioritize which insights to address by its **severity*** and overall impact on usability and the user experience.

Severe

Major usability problem. User cannot figure out how to complete the task without help. These are prioritized to address.

Moderate

Minor usability problem. User can still figure out how to complete the task after trial-and-error or some minor help. These should be addressed as it can block certain users from completing a task.

Cosmetic

This is a cosmetic problem only. User can still perform the task at hand, but the design could be more intuitive and UX can be improved, if addressed.

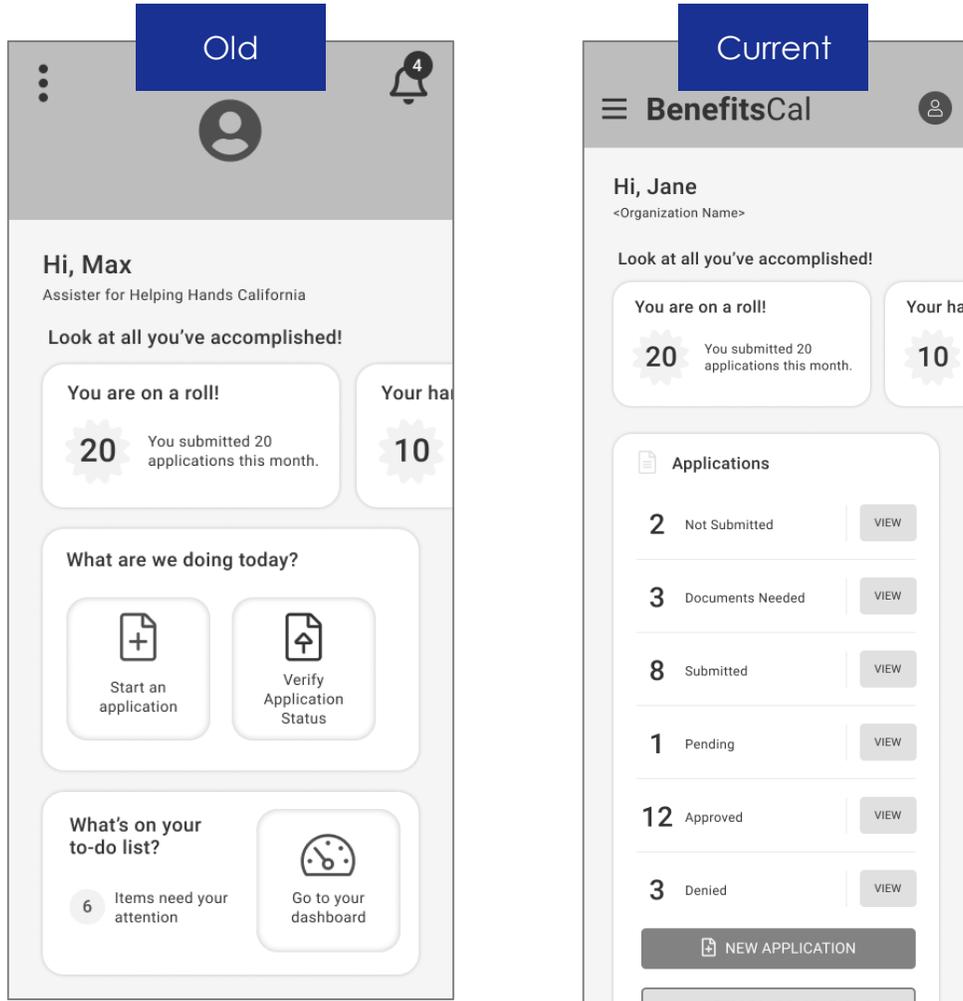
Noncritical

This is not a usability problem and the user completed the task. Could be a script/moderator error, a technical issue (Zoom, internet connection, etc.), a positive comment, or a recommendation that cannot be addressed for policy/requirement reasons.

*Severity: User's ability to complete a task during usability testing.



Screens



Usability Testing Insights

Severity

Moderate

Cosmetic

1 User Task Success
4 User Task Issues

Observation

CBO/FBO users were confused about how to proceed from the homepage to their dashboard. It was unclear to them how to get to their application list and their action items.

“ I did not think to go to the dashboard for continuing an application because I see ‘Start an application’ and ‘Verify Application Status’ and thought there would have been a ‘Continue an application.’ ”

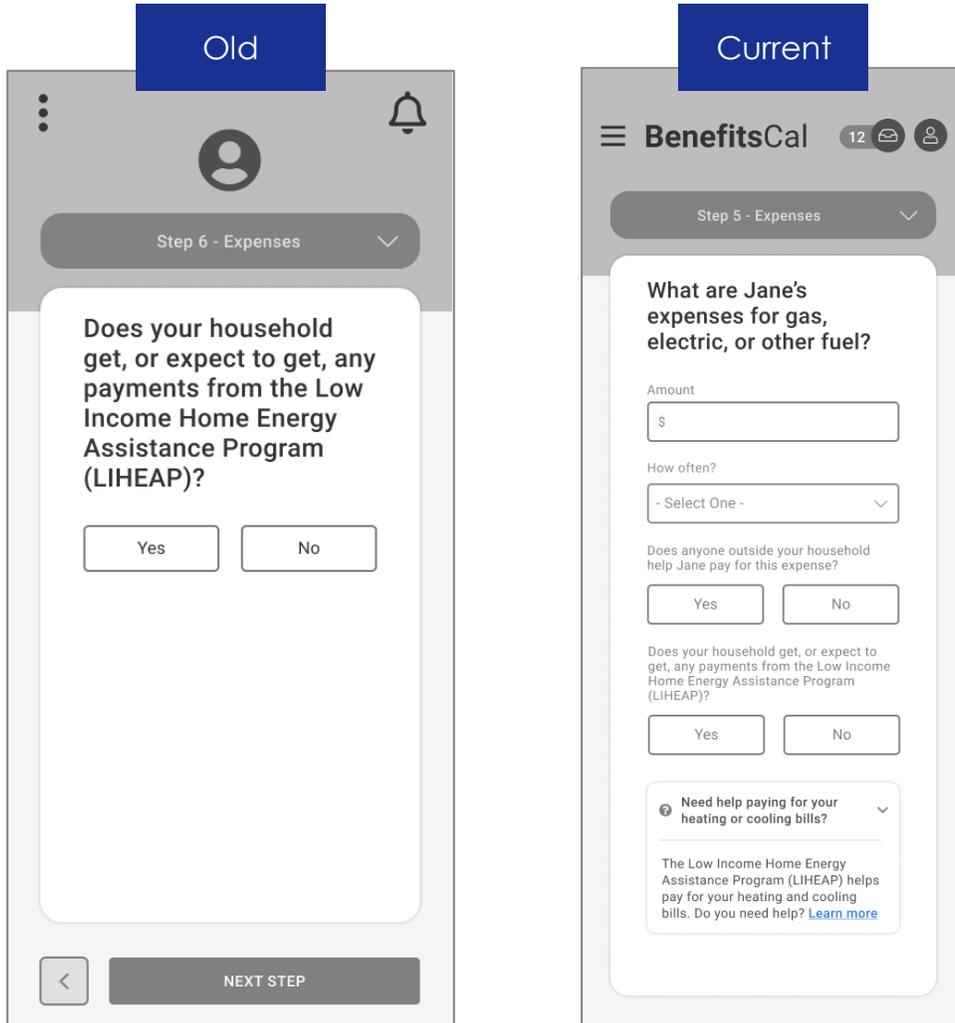
Design Solution Implemented

Consolidated the homepage into the dashboard itself so that the dashboard is displayed after login.



Screens

Usability Testing Insights



Severity

Moderate

4 User Task Success
2 User Task Issues

Observation

Customers were confused when the LIHEAP questions were asked out of context and without a tool tip.

“ I do know what LIHEAP is, but there is a chance that someone doing this would not know what this is so they might also be interested in learning more about it. If I see a program like this that I don't know, personally, I typically Google it and figure it out.

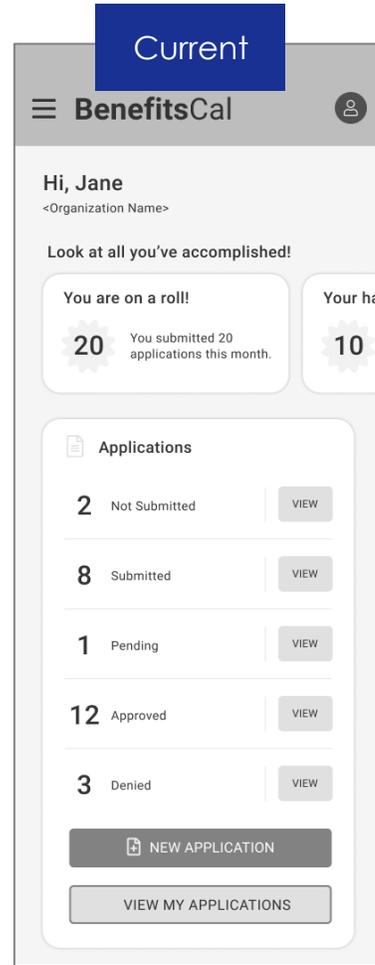
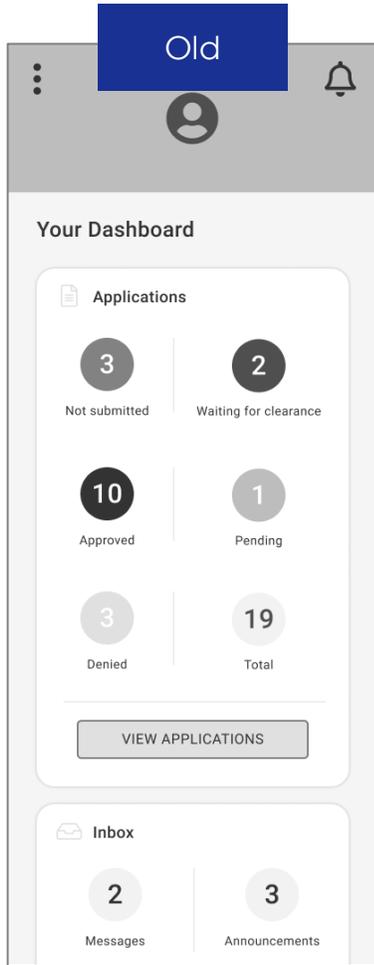
Design Solution Implemented

Moved the LIHEAP question to be contextual with the utilities questions and added a tool tip to explain what LIHEAP is.



Screens

Usability Testing Insights



Severity

Moderate

5 User Task Success
1 User Task Issues

Observation

CBO/FBO users were confused with the language used for the application statuses. It wasn't clear if they could click on the number to view more information about these applications.

“ I've never heard of 'waiting for clearance.' To me I feel like this should just be grouped with 'Pending.' ”

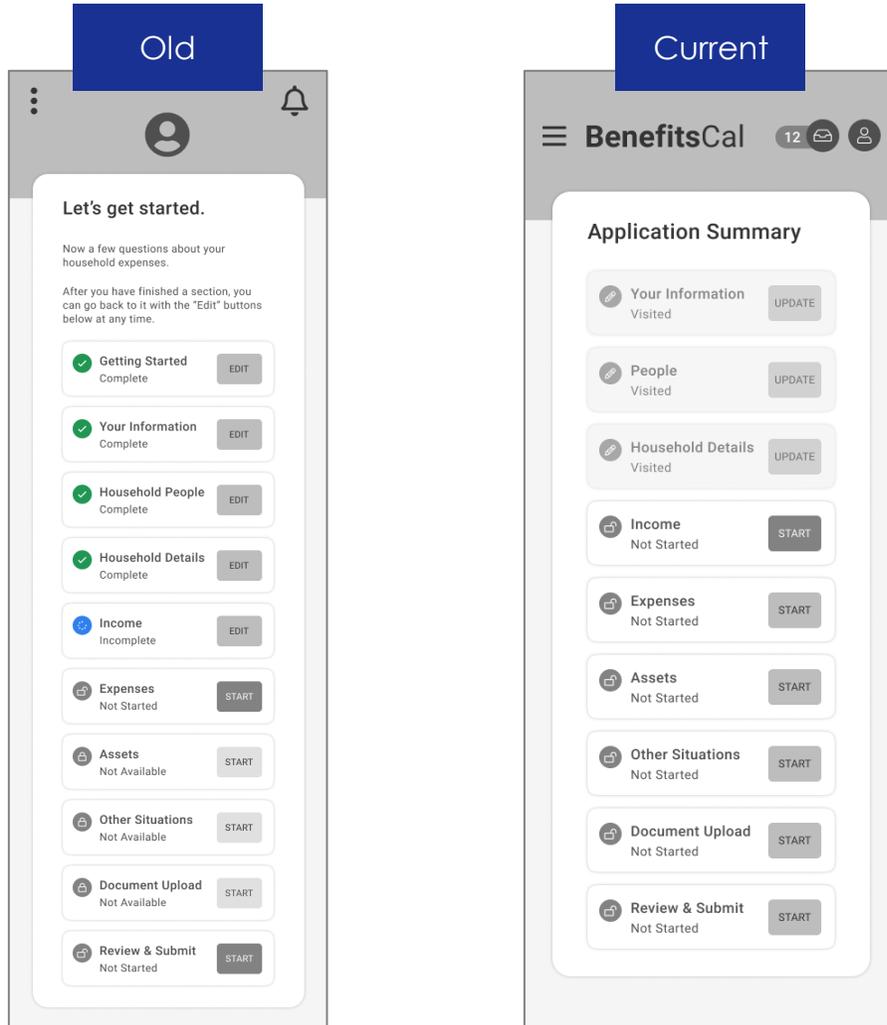
Design Solution Implemented

Updated the application status names to reflect names used by users. Added action button to make it clear what action can be taken.



Screens

Usability Testing Insights



Severity

Moderate

5 User Task Success
1 User Task Issues

Observation

User accidentally clicked on the first tile of the application summary instead of the section they were asked to begin. Wasn't clear enough that previous section was visited or completed.

Design Solution Implemented

Simplified the application summary page. Once a section is visited, it becomes muted and the button changes from "start" to "update" to keep the focus on the section ahead.

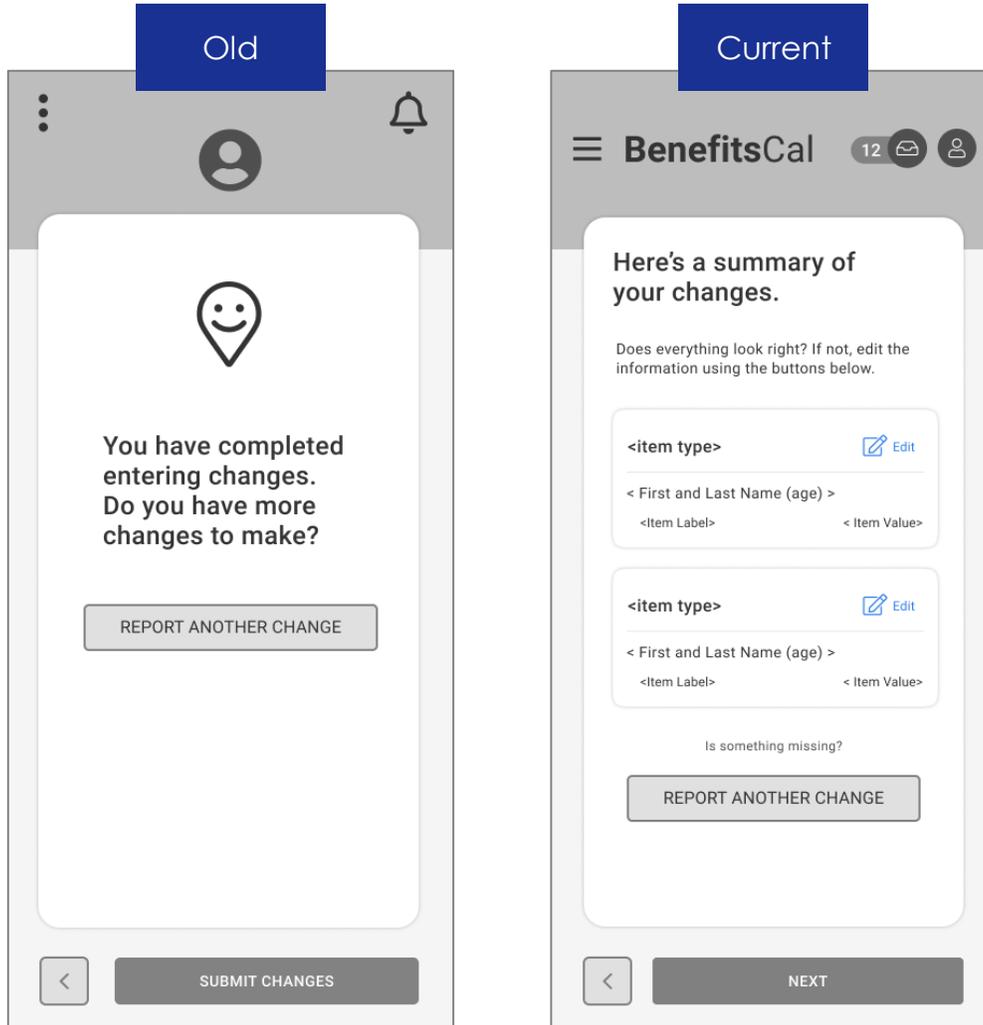
Improvements Made – Report a Change Summary

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Screens

Usability Testing Insights



Severity

Cosmetic

5 User Task Success
1 User Task Issues

Observation

User thought the “report a change” button was out of context and too generic by itself.

“ I think [the Report Another Change button] is kind of redundant because at this point I should have added that previously and then in my summary I should have caught that.”

Design Solution Implemented

Combined the button to be on the change summary screen, in context of reviewing changes that have been entered.