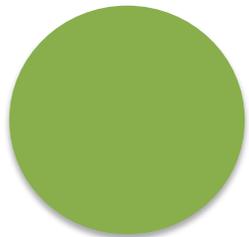


CalSAWS | Usability Testing – Round 2 Results Report



January 7, 2021

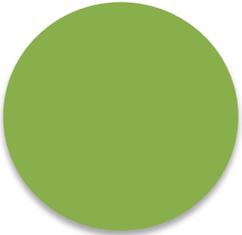
““ The experience of witnessing people’s reactions firsthand alters the conversation from “what I think” to “what customers think.” ””

- Hoa Loranger, Nielsen Norman Group

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.

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Executive Summary

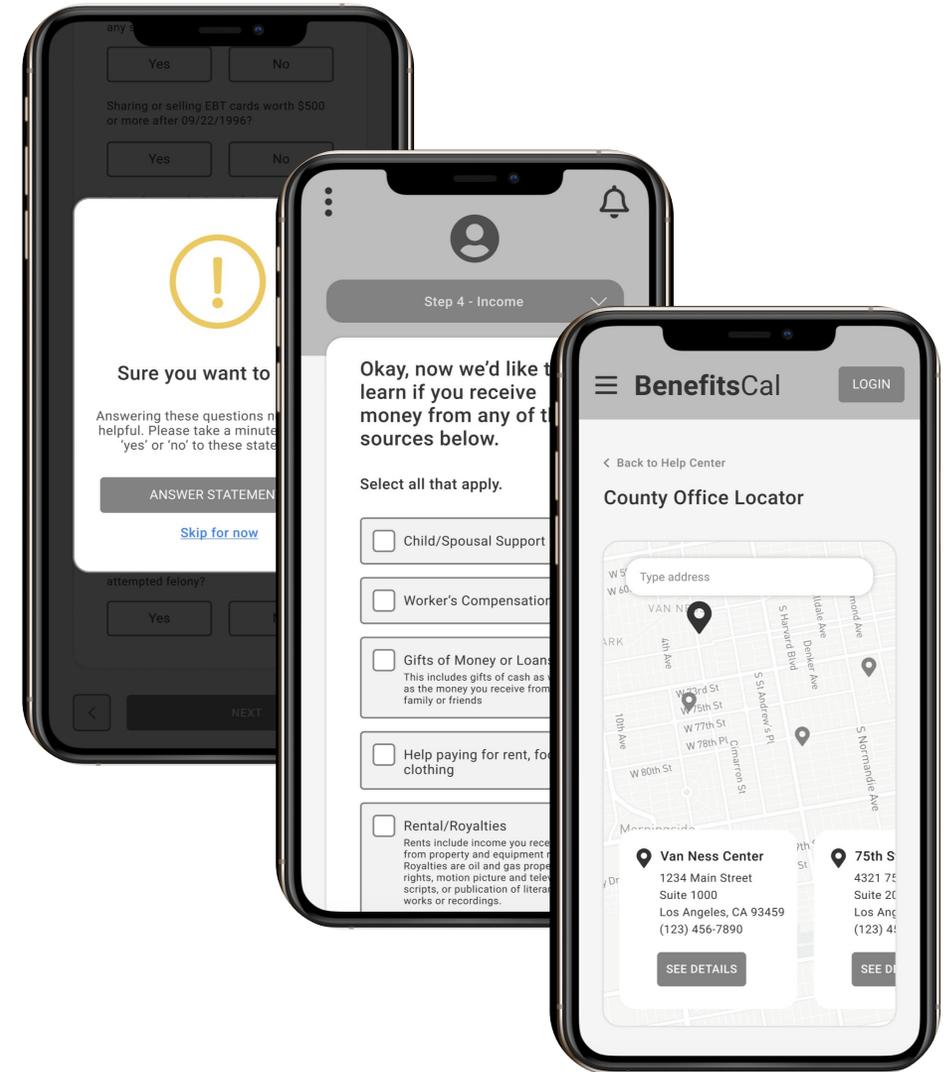
Usability testing is a user-centered design technique utilized to gather user input on design concepts.

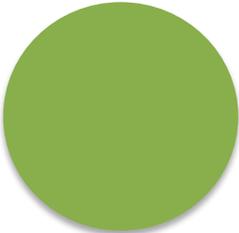
To confirm the usability of design concepts for BenefitsCal, the team conducted a series of evaluative research activities.

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.

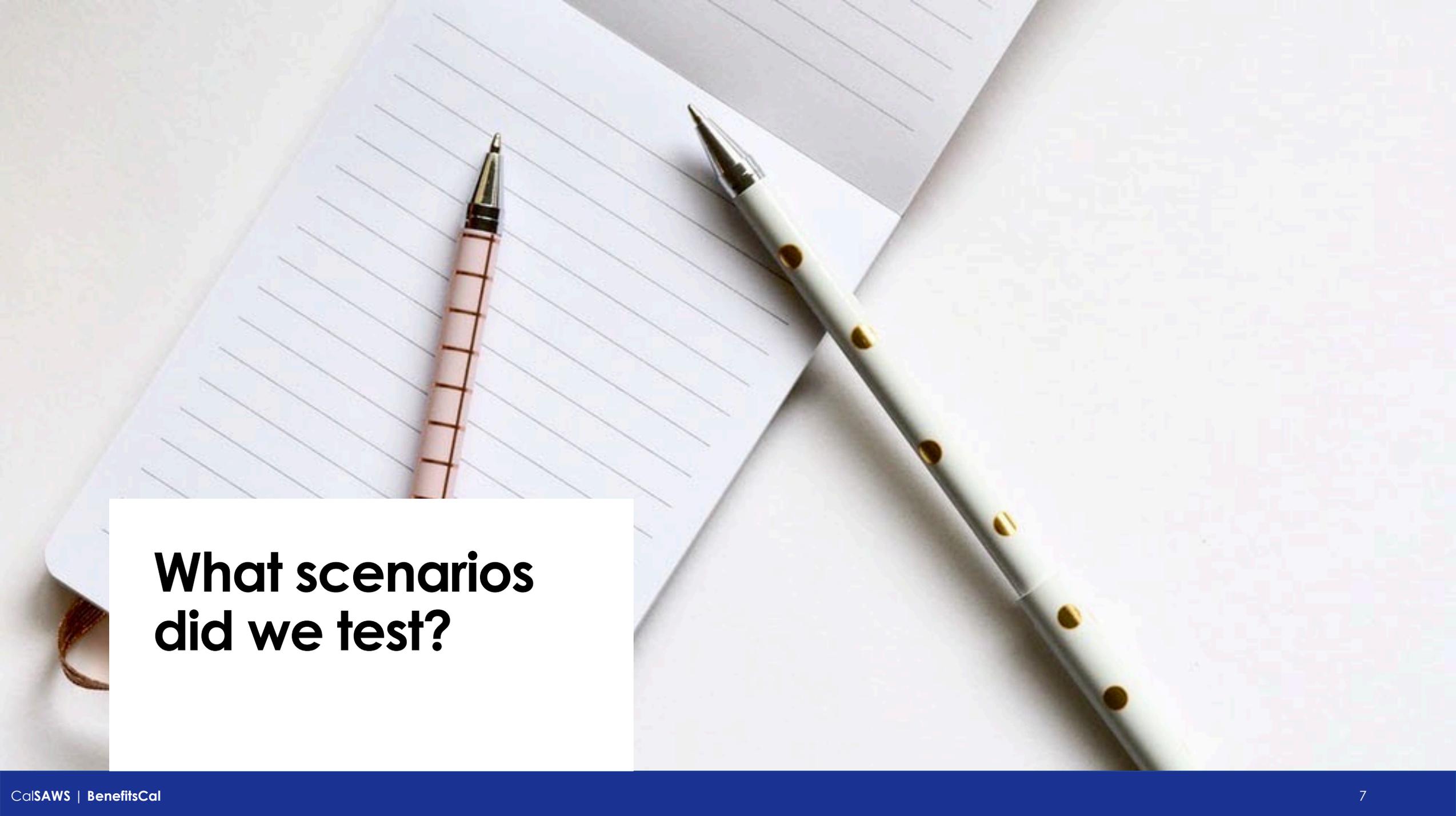
This research was conducted as the second round of usability testing during the General Systems Design phase. Further usability testing will continue throughout the upcoming project phases.

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





Usability Results Report: Round 2



**What scenarios
did we 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.

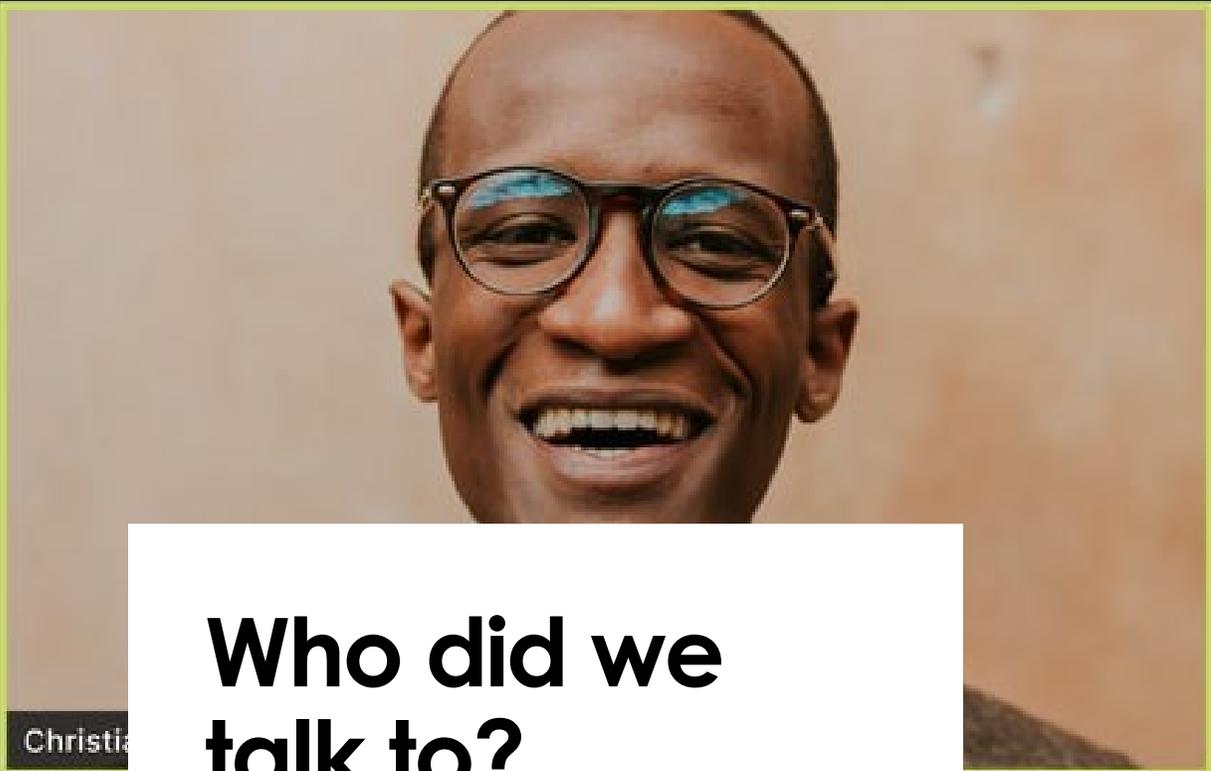
CUSTOMER SCENARIOS

Questionnaire	<i>Capture demographic data including county, age, education, benefits received, comfort with technology, and experience using the website.</i>
Dashboard Find Local Office	<i>Find a local county office.</i>
Log In	<i>Login to an account and send verification codes.</i>
Link to a Case	<i>Link a case that was previously done outside the website.</i>
View Case Details	<i>View details on the user's case.</i>
View Program Details	<i>View details on the user's enrolled programs.</i>
View EBT Transactions	<i>View details on transactions on EBT card.</i>
Perform Recertifications	<i>Complete information related to People, Income, and Expenses for a recertification.</i>

CBO/FBO SCENARIOS

Questionnaire	<i>Capture demographic data including county, age, education, organization size, comfort with technology, and experience using the website.</i>
Dashboard Overview	<i>View CBO dashboard to navigate to other parts of the application.</i>
View Not Submitted Applications	<i>Continue a previously started application that has not been submitted.</i>
View Application Details	<i>View information about application details.</i>
View Your Reports	<i>View reports on the status of the CBO's applications.</i>
Disable John Smith's Account*	<i>Disable an account of staff in their organization</i>
View Jane Smith Not Submitted*	<i>Continue an application previously started by staff in their organization that has not been submitted.</i>
Apply for Benefits Part 1	<i>Assist a customer to complete income questions while applying for benefits.</i>
Apply for Benefits Part 2	<i>Assist a customer to complete expense questions while applying for benefits.</i>

*Scenario was only presented if participant was a CBO Manager/Supervisor



Christia

**Who did we
talk to?**



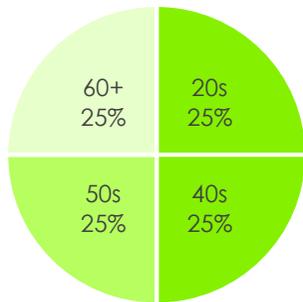
Sincerely Media

Participants

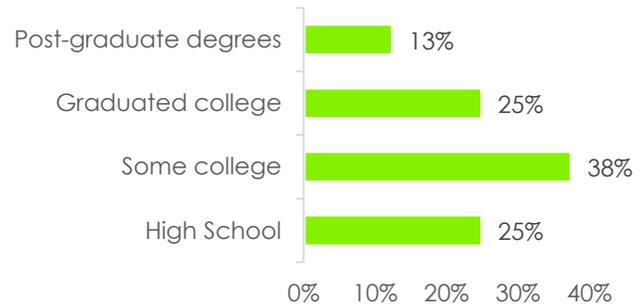
We conducted 14 one-on-one interviews for usability testing with users.

8 Customers

Age Ranges



Education Levels



Counties Represented

- Sacramento (1)
- San Bernardino (1)
- San Mateo (1)
- Santa Clara (5)

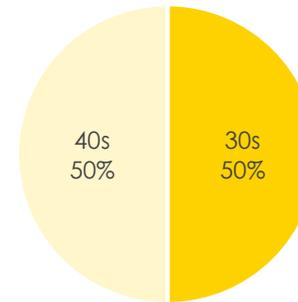
Languages Represented

- English (6)
- Spanish (2)

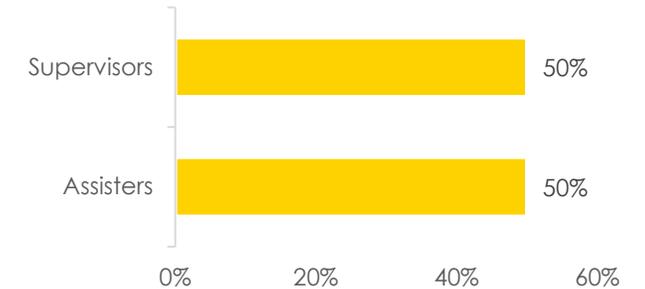
Customers were identified from CBO referrals and Customer Survey volunteers. All customers were currently receiving benefits or had received benefits in the past. All but one customer had used one of the existing state portals or other systems to apply for and/or manage their benefits.

6 CBO/FBO Workers

Age Ranges



CBO/FBO Roles



Counties Represented

- San Mateo (1)
- Santa Clara (3)
- San Diego (2)

CBO/FBOs were identified from volunteers within 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. Assisters and Supervisors were shown different screens, as Supervisors were shown screens to manage the organization.



**What did we
learn?**

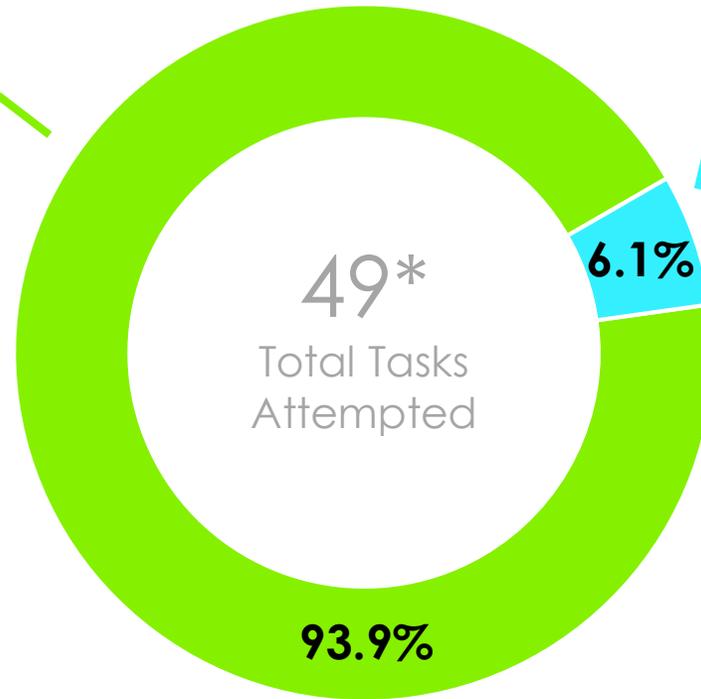
Customer Usability Test Results

Customers were evaluated while completing tasks.

Results Overview

94%
SUCCESS RATE

We conducted 8 one-on-one customer interviews. The scenarios included Finding a Local Office, Logging In, Linking to a Case, Viewing Case Details, Viewing Program Details, Viewing EBT Transactions, and Performing Recertifications.



BLOCKING ERROR RATE **

3 types of errors contributed to the 6.1% error rate, all of which are being addressed by the Design Team.



Viewing EBT Transactions (Your Dashboard) – 1 Customer did not know how to access her EBT transactions by first going into her Case Details

Viewing Program Details (Your Dashboard) – 1 Customer did not realize she had to go into her case details to view program details.

Performing Recertifications (Let's make sure you continue to get the help that you need) – 1 Customer did not know where to click to begin the recertification

* Due to a lack of knowledge in English, one customer was asked for feedback rather than to complete tasks.

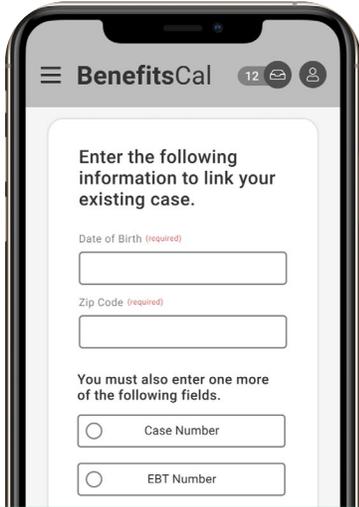
** When an error was made on any part of a task, the entire task was coded as unsuccessful. Error rate = Number of tasks with an error / Total number of tasks tested.

Highlights for Success – Customer

DRAFT

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

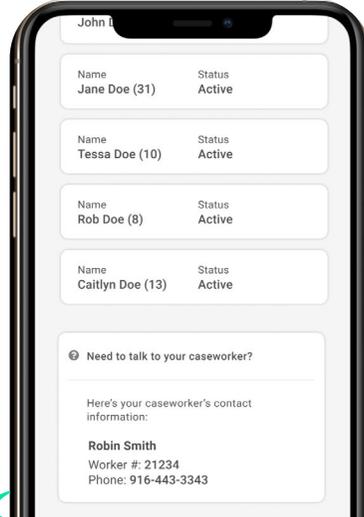
Using SSN



“No, I don't [know my case number]. I would probably choose 'Last 4 of SSN'... I would probably do the social first, then the phone number, [and] then the case number.”

Customers preferred to use the first four digits of their Social Security Number rather than use their case number to link a case to an account. Still, they liked the different options they could use to link a case.

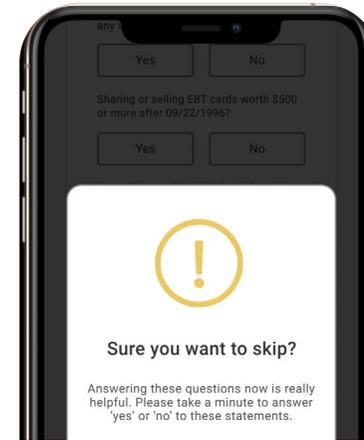
Caseworker Contact Info



“I like the fact that it has your caseworker and phone number...”

Customers liked that caseworker contact information was available to them, as they had difficulties contacting their caseworkers in the past.

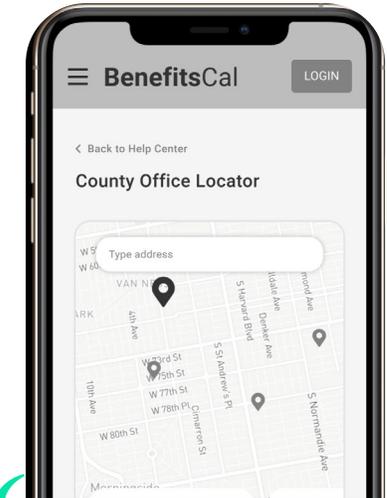
Warning Screens



“This is good too because sometimes when I see screens like this I'll be like, 'Hmm maybe there is something I should go back and answer,' so I think it is good if you want to skip through it but it's also that reminder just in case you want to go back and double check something.”

The pop-up warning screens that alerted customers that they were skipping sections on their recertifications was welcomed as it gave customers time to consider whether they wanted to leave information blank.

County Office Locator



“I really like this screen to find a local office. I can see all the offices nearby and quickly see their information.”

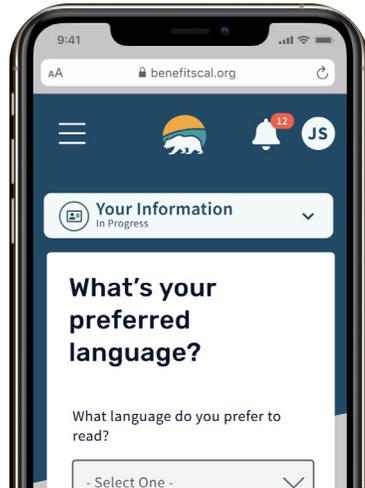
Customers liked the ability to search and find the closest county offices to them. They also liked how the county office locations were displayed on a map.

Highlights for Success – Customer (Continued)

DRAFT

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

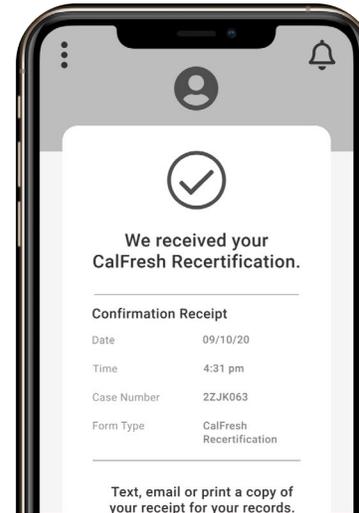
Color Contrast



I like the first one better because it has a darker background and with the sun glaring down on phones a lot, it's a lot easier to read.

Customers preferred the screen visual designs with **darker contrasted backgrounds**, since it was **easier to read**.

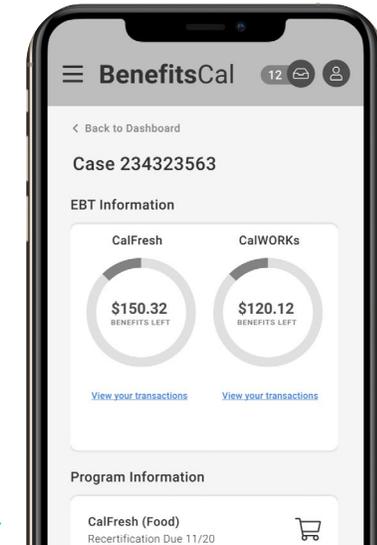
Recertification Confirmation



Oh, I think I need to see because I need to make sure everything is submitted and that you guys received my application.

Confirmation receipt for submitting a recertification was **given positive feedback**.

Case Details



I like that it tells me if I have EBT or CalWORKs and it tells me how much balance I have left.

Customers liked the **ease of viewing** their case details and **several key features**, including the ability to see benefits amounts, download benefits verifications, and access to complete their recertifications.

CBO/FBO Usability Test Results

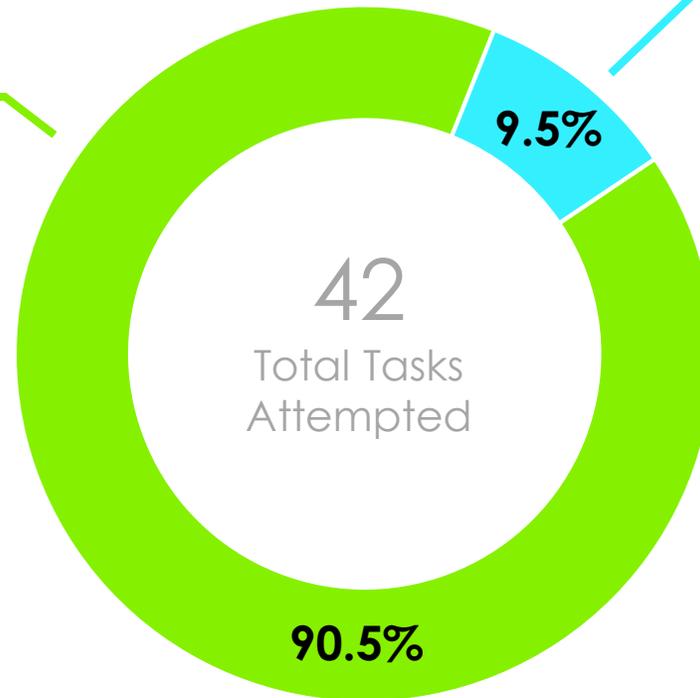
CBO/FBO assisters and managers were evaluated while completing tasks.

Results Overview

90.5%

SUCCESS RATE

We conducted 6 one-on-one interviews which CBO/FBO participants. The scenarios for CBO/FBO Assisters included a Dashboard Overview, Viewing Not Submitted Applications, Viewing Application Details, Viewing Reports, AFB – Income, and AFB – Changes. The scenarios for CBO/FBO Managers included the scenarios above, along with Disabling an Account and Viewing Another Assister's Not Submitted Applications.



ERROR RATE *

3 types of errors contributed to the 9.5% error rate, all of which are being addressed by the Design Team.



Viewing Another Assister's Not Submitted Applications - 2 CBOs did not know where to navigate to view all Assisters' applications.

Disabling an Account - 1 CBO Manager did not know where to navigate to disable an account from the dashboard.

AFB - Income - 1 CBO did not know what "in-kind income" is.

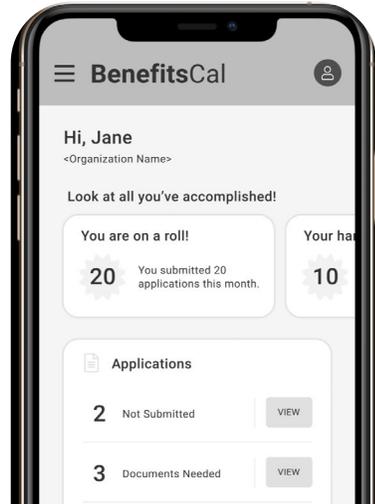
* When an error was made on any part of a task, the entire task was coded as unsuccessful. Error rate = Number of tasks with an error / Total number of tasks tested.

Highlights for Success – CBO/FBO

DRAFT

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

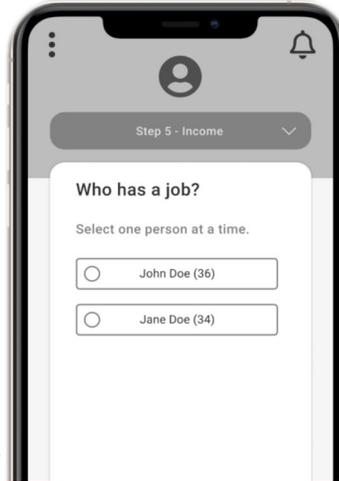
CBO/FBO Dashboard



“Our goal is to do 22 applications per month. It's very helpful to see these numbers here at the top.”

The CBO/FBO Dashboard allows CBO/FBOs to immediately **view key accomplishments and statistics as well as complete important action items**, which excited participants.

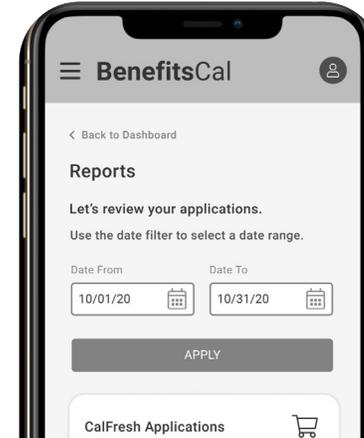
Ease of Use



“The fact that you have this on a cell phone the way it looks, is very friendly and readable, so that's a positive.”

CBO/FBOs liked how **easy, intuitive, and straightforward** it was to use different features. They also liked how they would be able to **access the websites on their phones**.

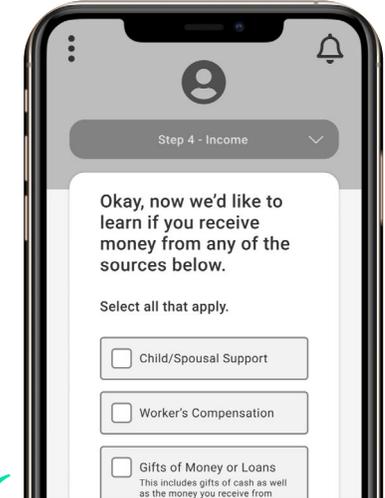
Reports Page Data



“The reports section is really useful. We're supposed to do follow-up calls that people were not wrongfully denied, so having the data is really important.”

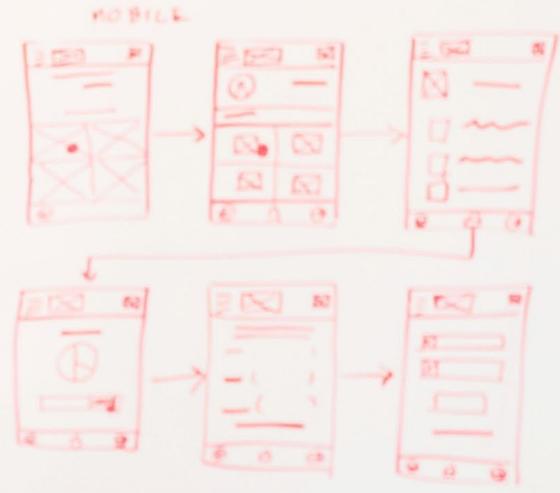
The Reports page showed **key metrics and useful information** on approved, submitted, and denied applications that CBO/FBOs could use to **track towards goals**.

Additional Details



“I really like the explanations under what each income category is. This would really help the clients to understand what these are.”

The **descriptions for different types of items included in different income categories** were welcomed by CBO/FBOs since they believed it would be helpful for Assisters and Customers alike.



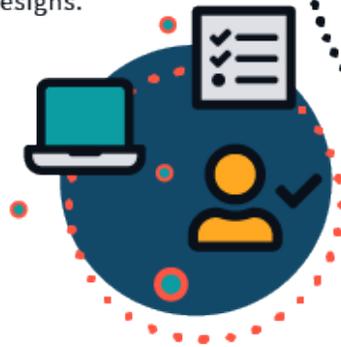
What we need to address

Heard it from the Lab



01. Conduct Usability Testing

First, we invite users to complete a set of tasks and we observe and listen as they interact with the designs.



02. Analyze the Results

Next, we analyze our observations from usability testing to derive usability insights. We prioritize which insight to address by its severity and overall effect on usability and user experience.



03. Update the Design

Then, we ideate on solutions, present them to stakeholders and incorporate the changes in the design!



Insights Prioritization Criteria: Severity

We prioritize which insights to address by their **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.

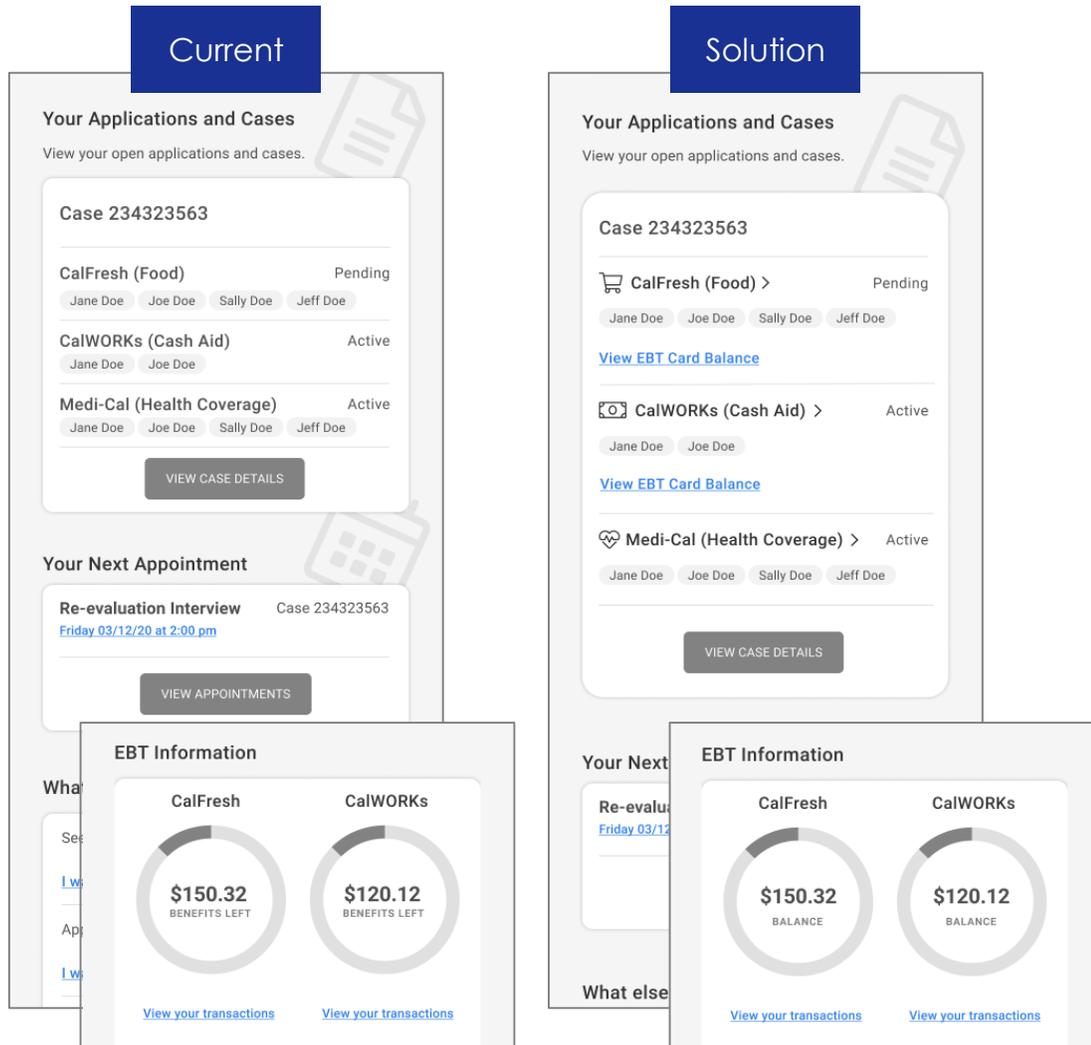
Noncritical

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. Blockers could include a copy issue (not understanding the text on screen) a functional/interaction issue or a design issue.

Screens

Usability Testing Insights



Severity

Severe

Moderate

3 User Task Success
5 User Task Issues

Observation

Customers were unclear about how to go view their EBT transactions from the dashboard. They were looking for the word "EBT" on the dashboard and needed moderator assistance to know that information would be on the Case Details page. Additionally, one customer mentioned that "benefits left" was unclear and would prefer the word "balance" to refer to EBT card information.

Proposed Solution

Add an EBT link to the dashboard on the case card with the programs that have an EBT card.

Screens

Usability Testing Insights

Current

Your Applications and Cases
View your open applications and cases.

Case 234323563

CalFresh (Food) Pending
Jane Doe Joe Doe Sally Doe Jeff Doe

CalWORKs (Cash Aid) Active
Jane Doe Joe Doe

Medi-Cal (Health Coverage) Active
Jane Doe Joe Doe Sally Doe Jeff Doe

VIEW CASE DETAILS

Your Next Appointment

Re-evaluation Interview Case 234323563
Friday 03/12/2020 at 2:00 pm

VIEW APPOINTMENTS

What else would you like to do?

See if you qualify for other programs or benefits.
[I want to see if I'm eligible](#)

Apply for the programs you qualify for.
[I want to apply for a new program](#)

Solution

Your Applications and Cases
View your open applications and cases.

Case 234323563

CalFresh (Food) > Pending
Jane Doe Joe Doe Sally Doe Jeff Doe
[View EBT Card Balance](#)

CalWORKs (Cash Aid) > Active
Jane Doe Joe Doe
[View EBT Card Balance](#)

Medi-Cal (Health Coverage) > Active
Jane Doe Joe Doe Sally Doe Jeff Doe

VIEW CASE DETAILS

Your Next Appointment

Re-evaluation Interview Case 234323563
Friday 03/12/2020 at 2:00 pm

VIEW APPOINTMENTS

What else would you like to do?

Severity

Severe

Cosmetic

5 User Task Success
3 User Task Issues

Observation

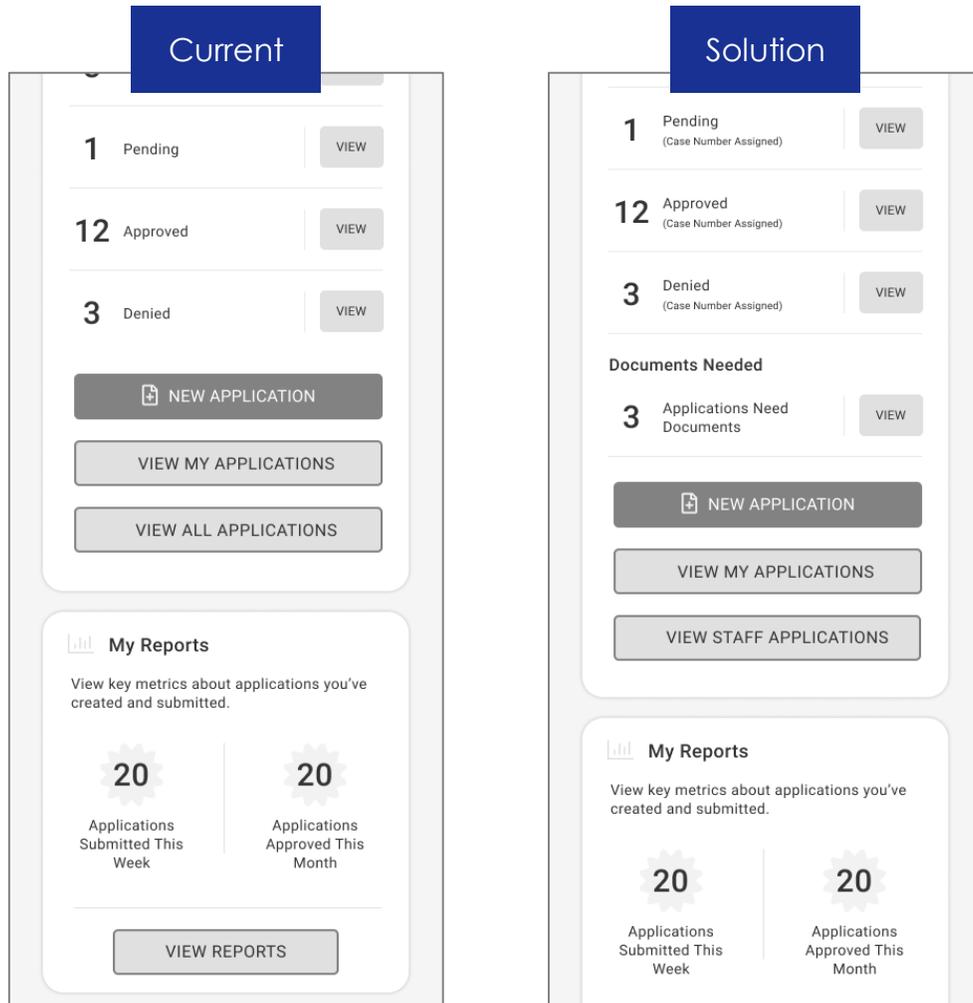
Customers were unclear about how to get to the program details page from the dashboard. They tried to click on the program name, but they had to go to case details first. All but one eventually clicked on “view case details” and found the program detail page. One needed moderator assistance to complete the task.

Proposed Solution

Add a direct link to the program details page from the dashboard by making program names clickable.

Screens

Usability Testing Insights



Severity

Severe

Cosmetic

3 User Task Success
3 User Task Issues

Observation

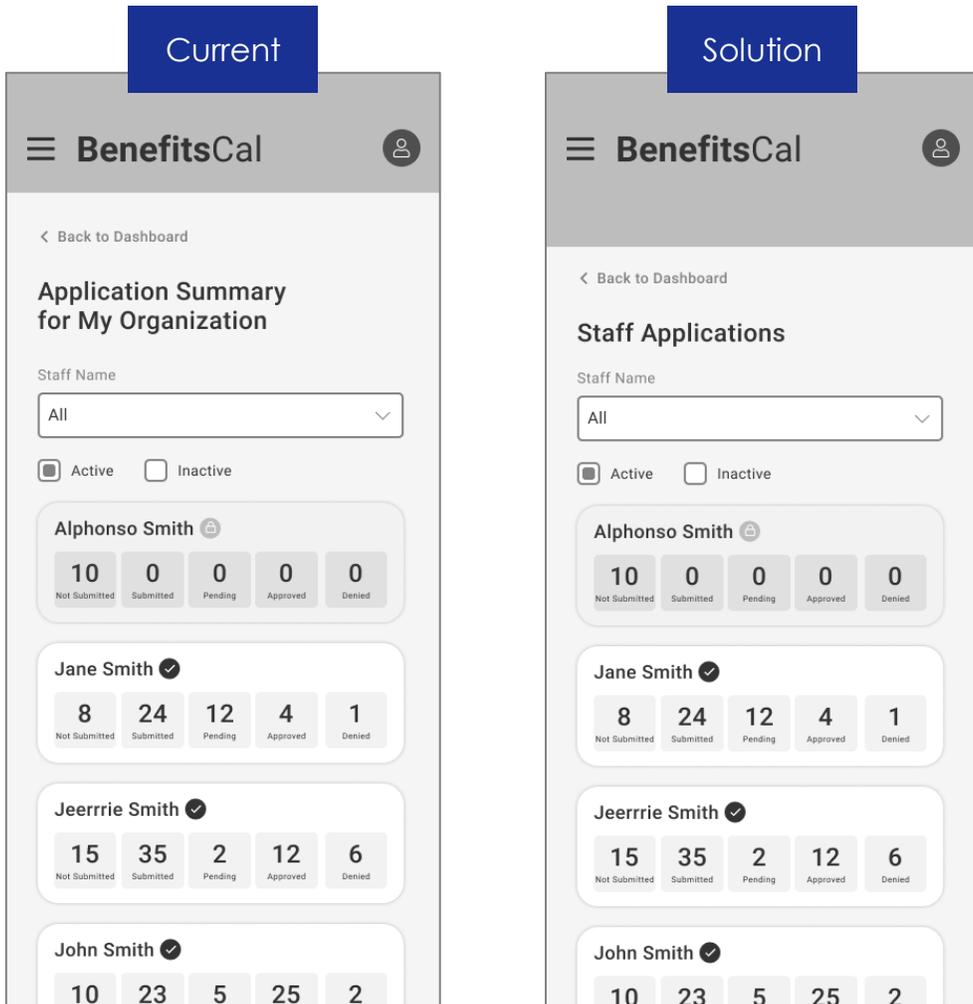
CBO/FBOs were unclear about how to view one of their staff's application from the dashboard. They understood how to do it from the organization summary page, but they were unable to get to the page without the moderator's help. All CBO/FBOs were unclear about the different functionalities of the "View My Applications" and "View All Applications".

Proposed Solution

Change the button wording to make it clear that it is to view staff application.

Screens (Continued)

Usability Testing Insights



Severity

Severe

Cosmetic

3 User Task Success
3 User Task Issues

Observation

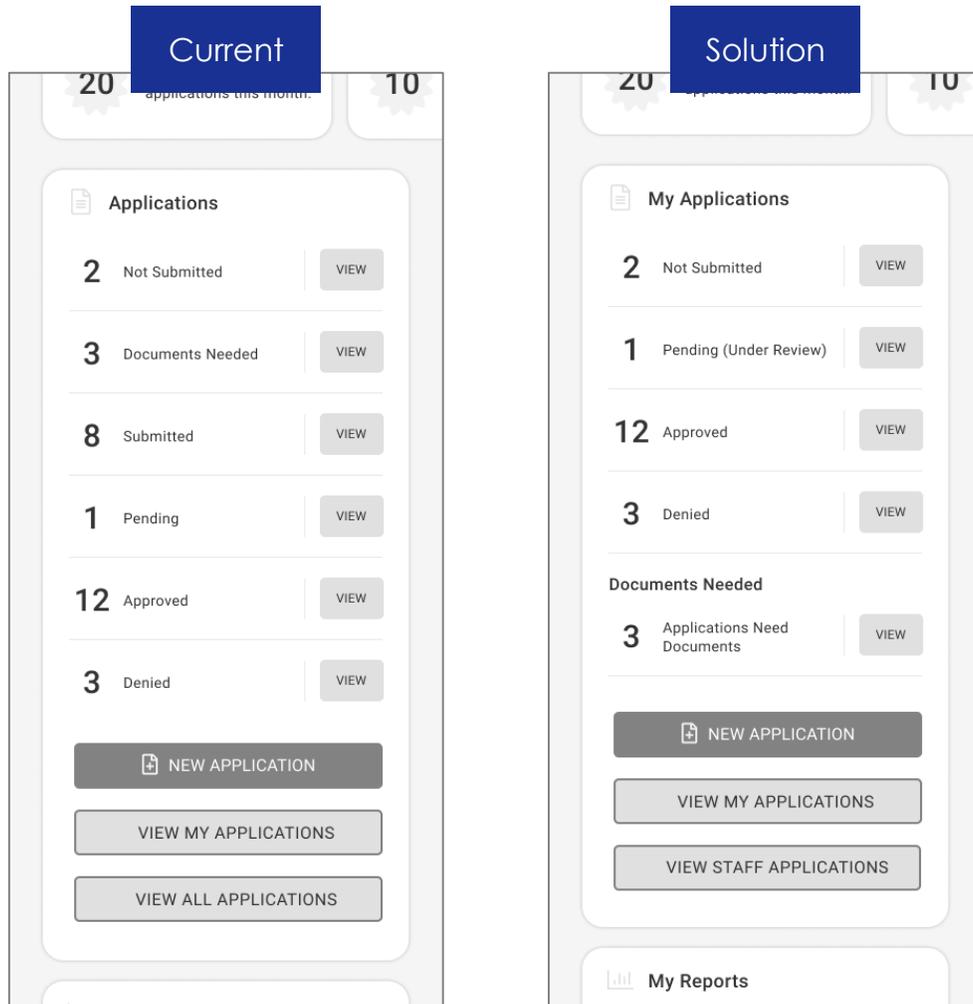
Make page title consistent with dashboard tile.

Proposed Solution

Rename the page to Staff Applications.

Screens

Usability Testing Insights



Severity

Moderate

Cosmetic

3 User Task Success
3 User Task Issues

Observation

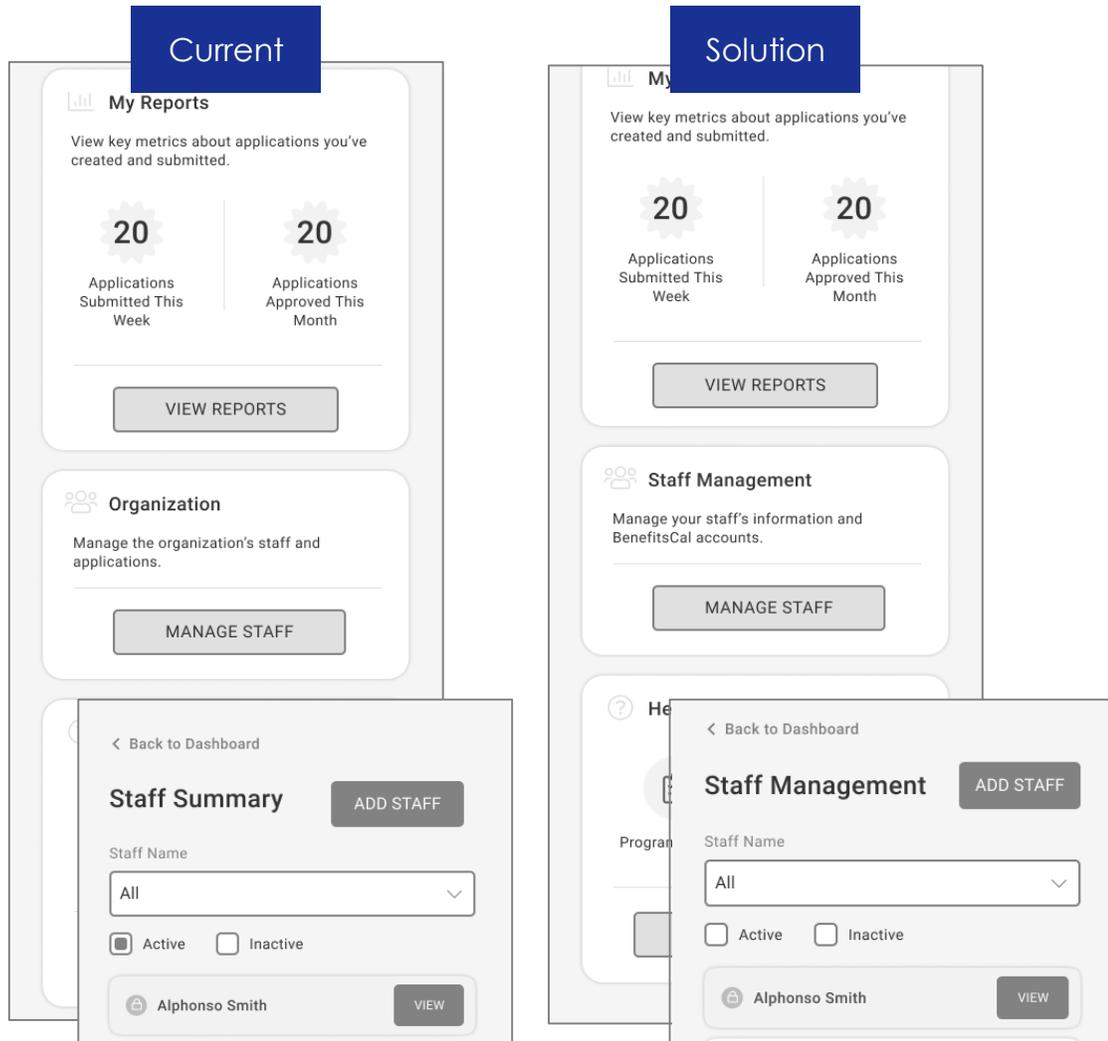
CBO/FBOs were unclear about some of the status definitions and which ones were applications vs. cases. They were specifically unclear about the "Documents Needed" as it could apply to multiple statuses. They were also unclear about the difference between the "Pending" and "Submitted" statuses.

Proposed Solution

Combine applications "Submitted" and "Pending" as they are both considered under review. Separate the applications that have "Documents Needed" in another section of the card as it can apply to multiple statuses. CBO/FBO liked that feature as it is a clear action item.

Screens

Usability Testing Insights



Severity

Moderate

5 User Task Success
1 User Task Issues

Observation

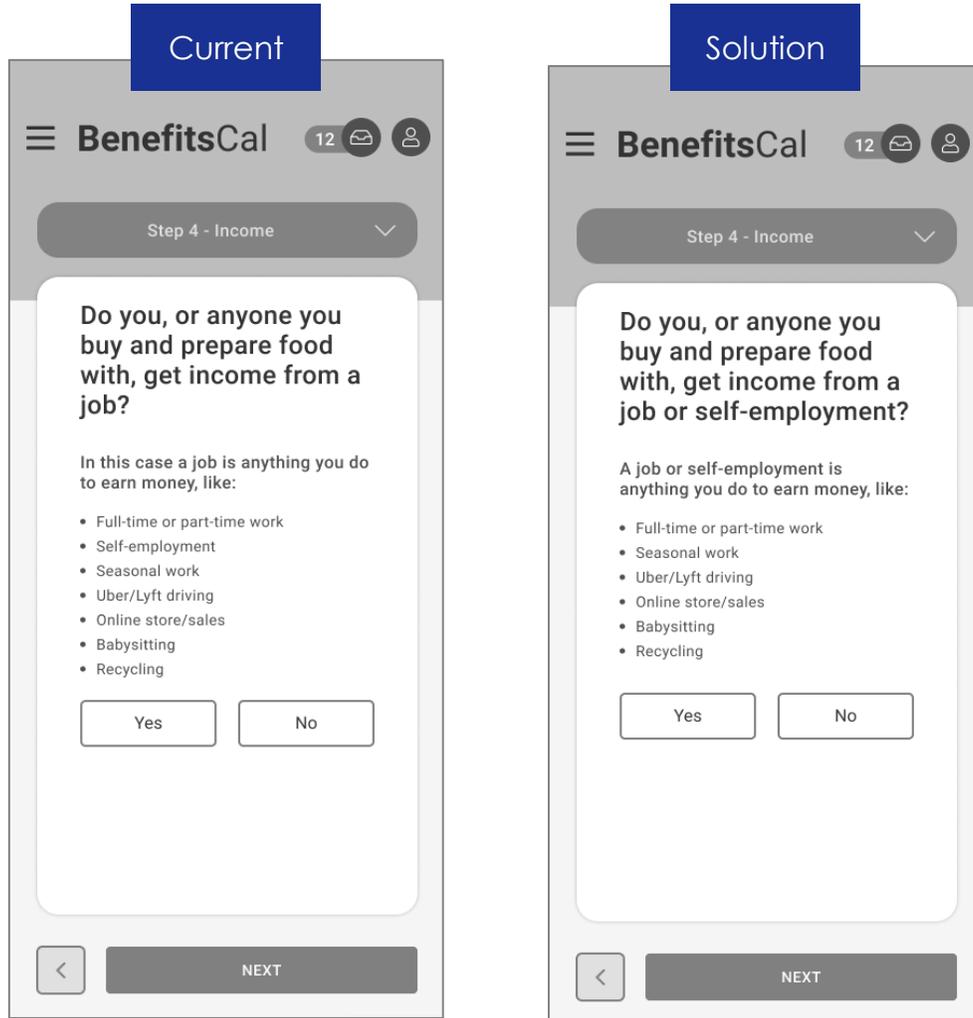
1 CBO/FBO was unable to find how to disable a staff account from the dashboard.

Proposed Solution

Adjust language on "Manage Staff" card to reflect actions that can be taken on the staff management page. Make the card title consistent with the page title.

Screens

Usability Testing Insights



Severity

Moderate

Cosmetic

11 User Task Success
3 User Task Issues

Observation

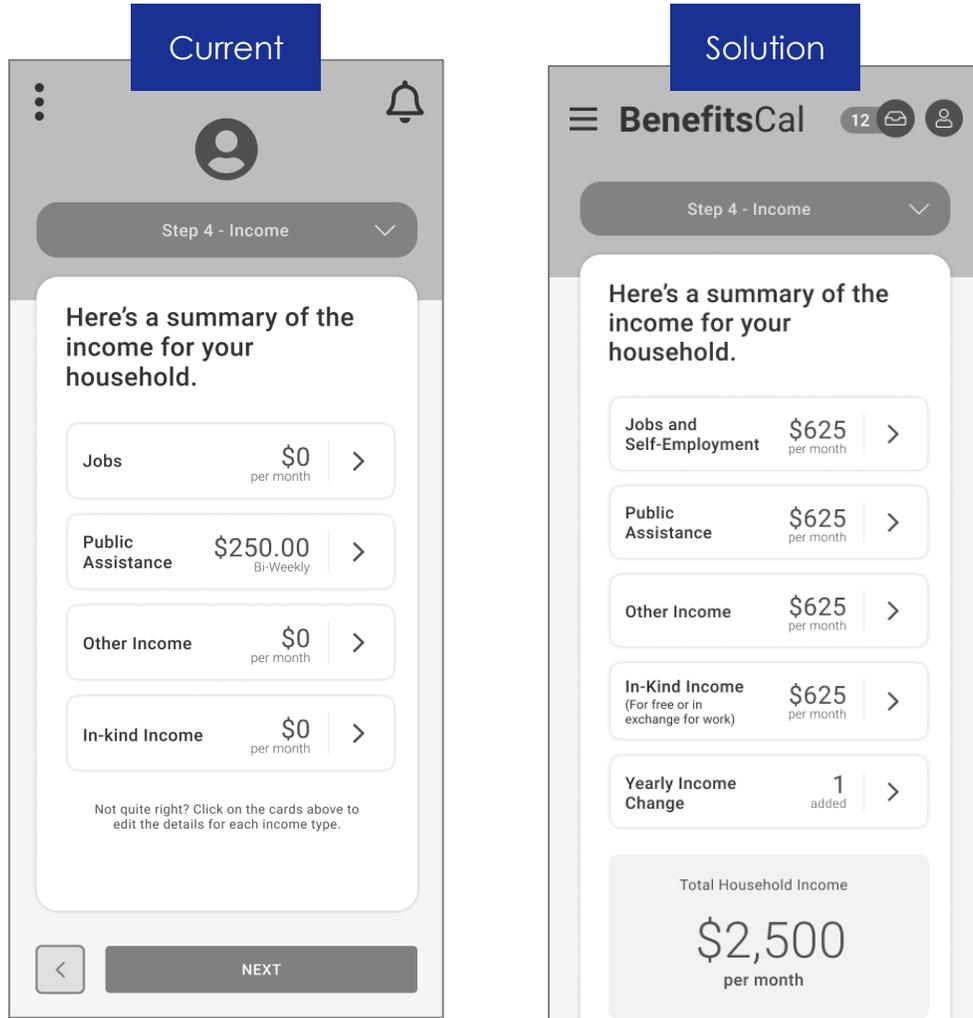
Customers were confused between self-employment and unemployment income. They were unsure whether unemployment would be considered as income from a job and not sure what would be considered self-employment since it was listed in the example list along with examples of self-employment.

Proposed Solution

Review question copy and examples to make it clear that income from a job is also income from self-employment. Remove "self-employment" from the example list and move to the actual question. The example list should only show examples of self-employment jobs.

Screens

Usability Testing Insights



Severity

Moderate

Cosmetic

10 User Task Success
4 User Task Issues

Observation

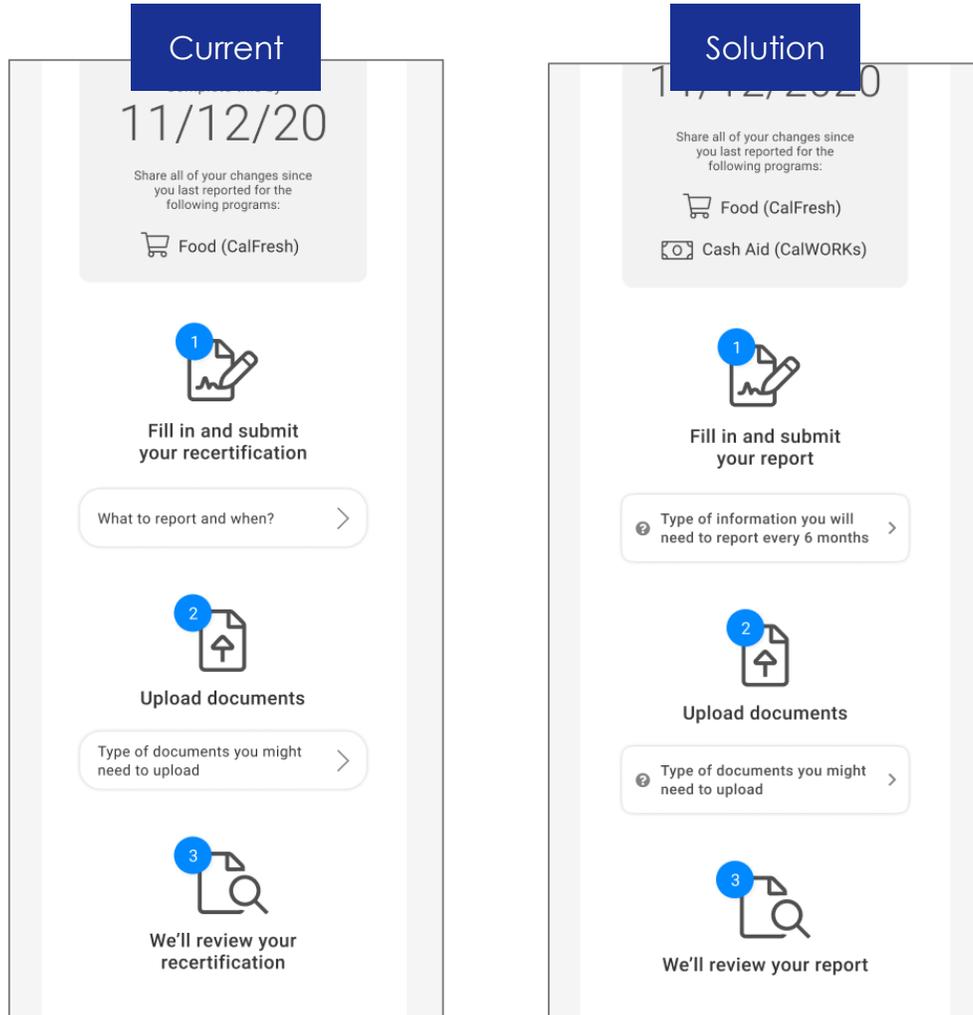
Customers and CBOs were confused with the categories listed on the income summary screen, specifically the income in-kind category, and were looking for self-employment. All of them were able to complete the task by expanding the summary cards.

Proposed Solution

Add self-employment to the job title card and add sub-text defining the income in-kind category.

Screens

Usability Testing Insights



Severity

Moderate

Cosmetic

6 User Task Success
2 User Task Issues

Observation

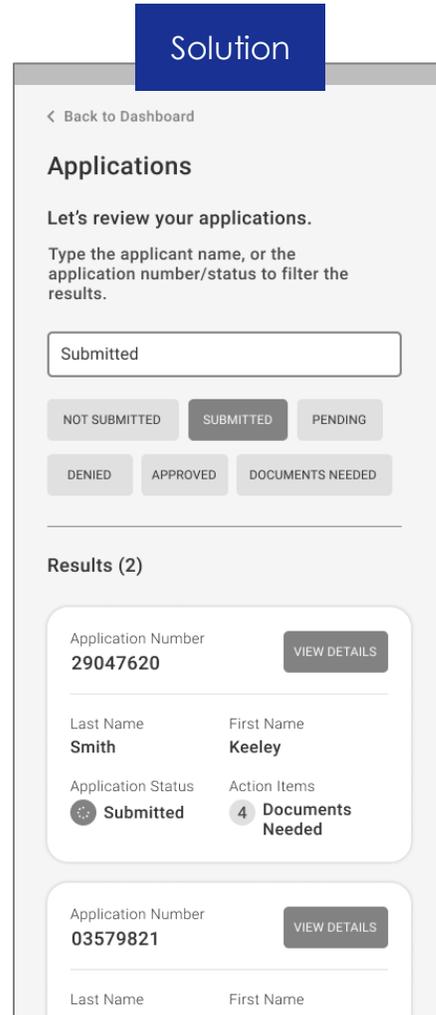
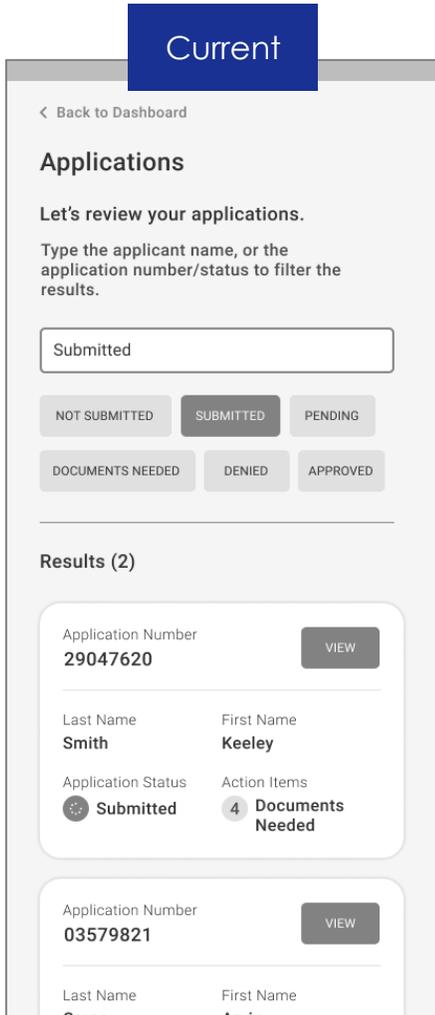
2 customers had issues with the Recertification welcome page and thought the first help text "What to report and when" would lead them to the start of the process. One of them needed moderator instruction to complete the task.

Proposed Solution

Change the wording of the help text and change the inline help style so it doesn't look like a button.

Screens

Usability Testing Insights



Severity

Moderate

5 User Task Success
1 User Task Issues

Observation

1 CBO/FBO was unclear about where the view button would take them. They assumed they would be able to view the filled-out application rather than go to the case details page.

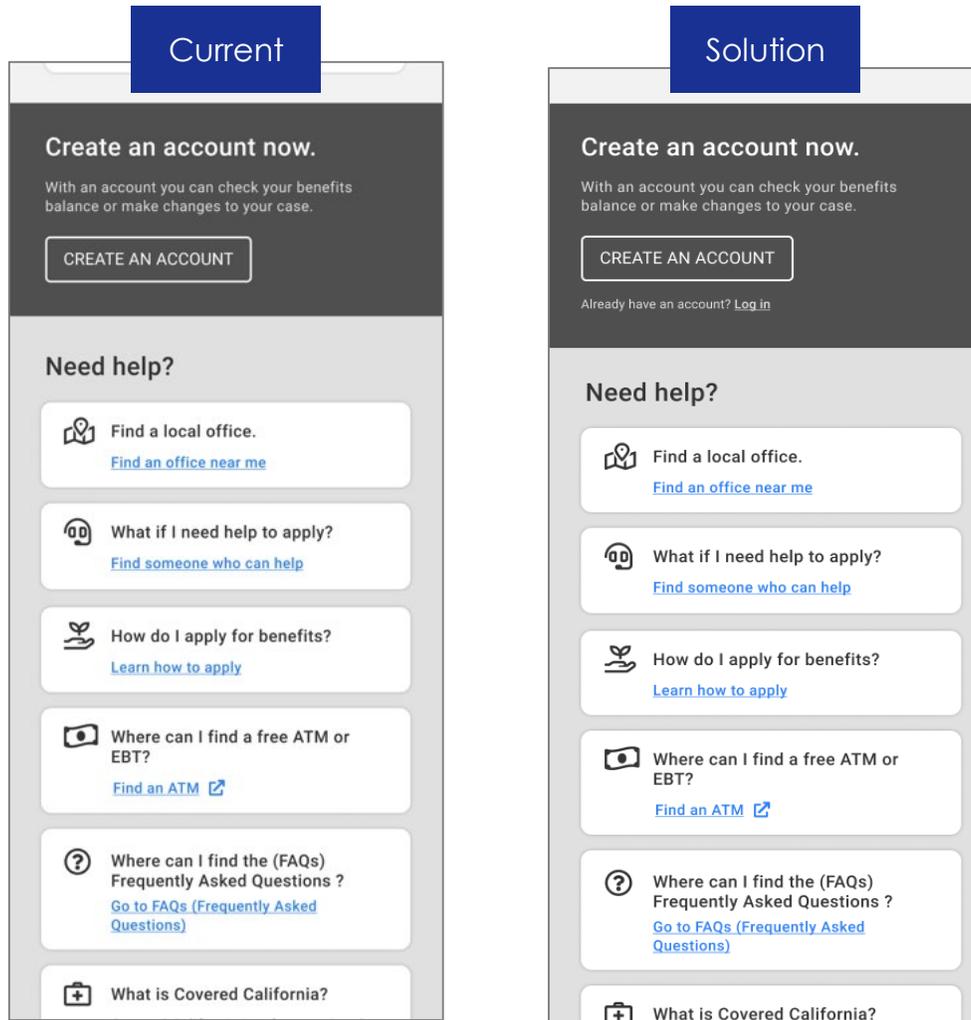
“ The 'View' button would be to view the whole application or a part of the application? ”

Proposed Solution

Adjust language on button to make it clearer that it would lead to a case detail page and not the ability to view the filled-out application.

Screens

Usability Testing Insights



Severity

Cosmetic

7 User Task Success
1 User Task Issues

Observation

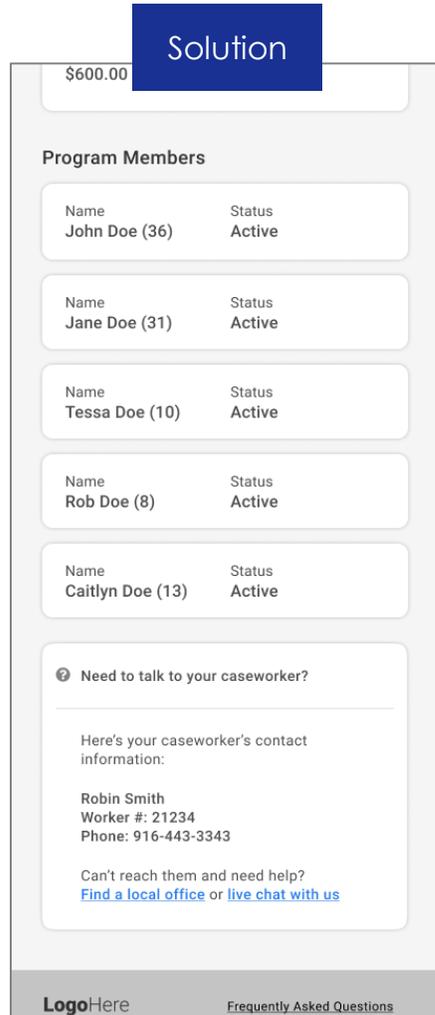
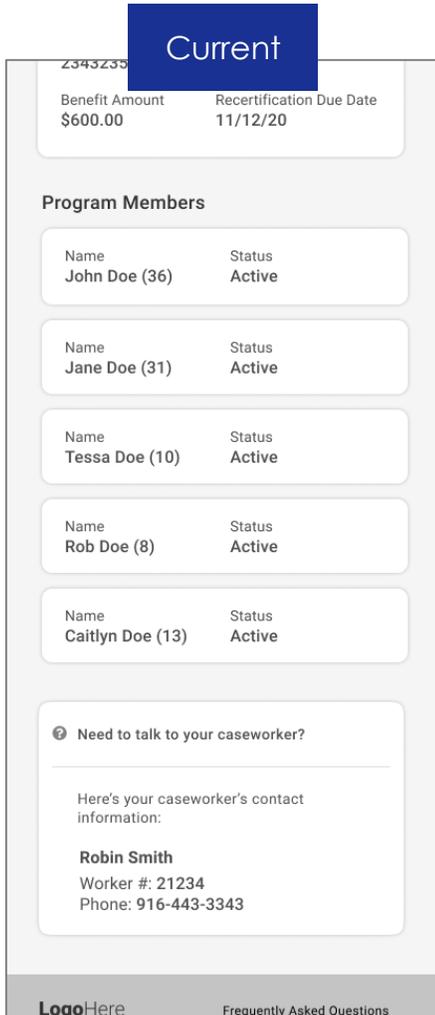
Customer missed the login option in the header and navigated to the "Create an Account" section of the homepage. Customer did not click the button of that section however, since they thought it would lead to a different page than the login page.

Proposed Solution

Add text under "create an account" that reads, "Already have an account? Log in" to make sure customers can log in from multiple locations on the homepage.

Screens

Usability Testing Insights



Severity

Cosmetic

7 User Task Success
1 User Task Issues

Observation

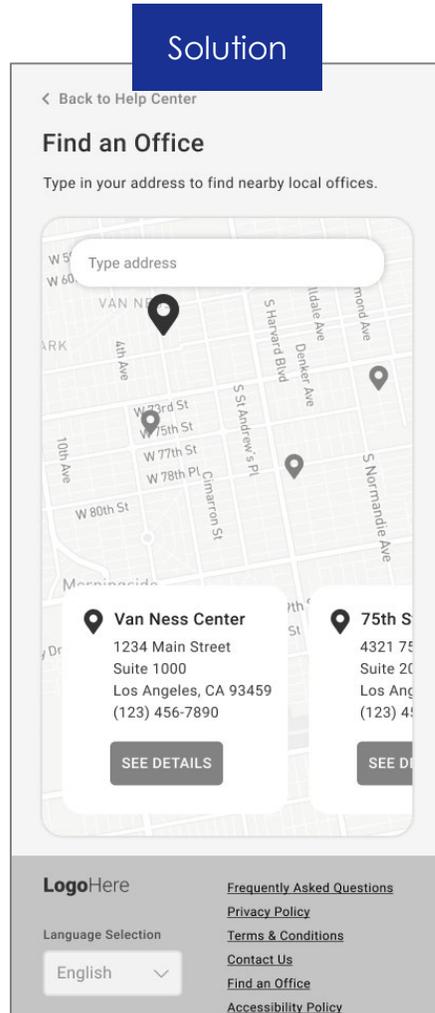
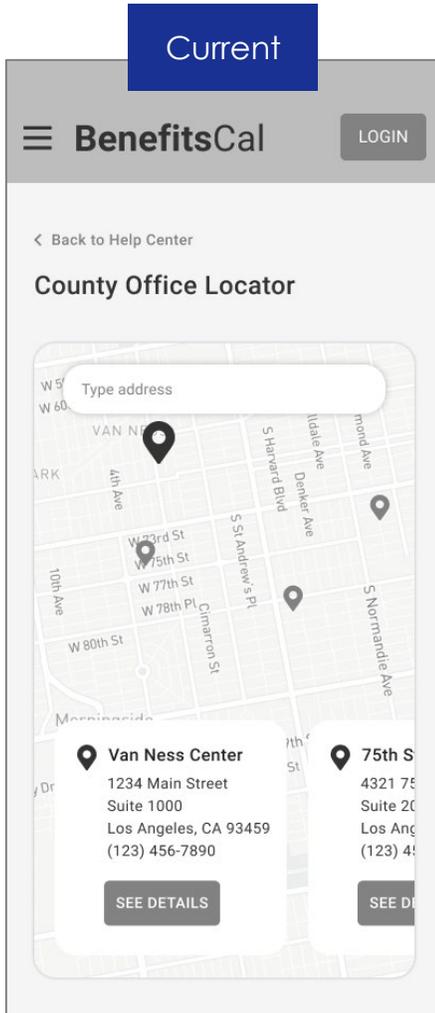
A customer mentioned that it would be nice to have other contact and support options on the program details pages in case their caseworker is unavailable.

“ I would rather have both a number to the direct caseworker and a number to a group call center in case I can't reach the caseworker ”

Proposed Solution

Add a link to the “Find an office” page and to the live chat for support.

Screens



Usability Testing Insights

Severity

Cosmetic

7 User Task Success
1 User Task Issues

Observation

A customer thought "Office Locator" was hard to understand; was expecting the page to have some help text around how to find an office near them.

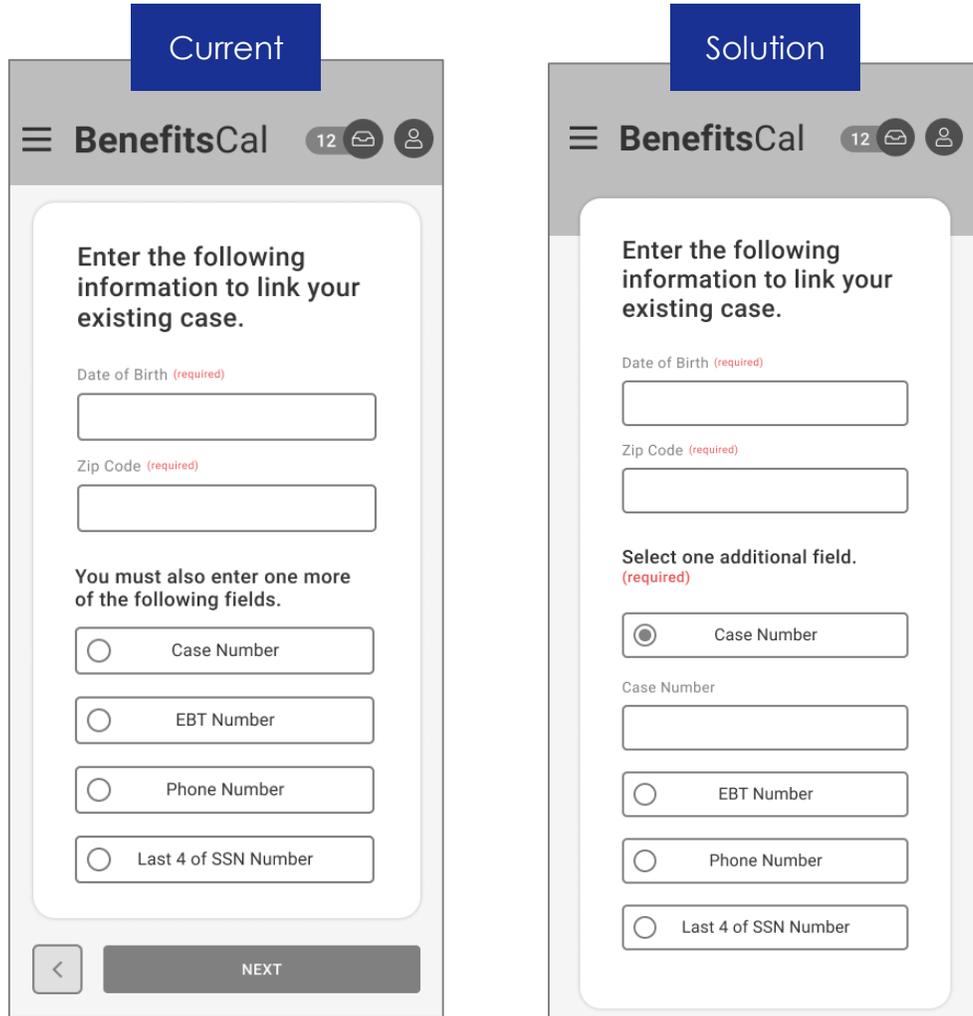
“ I think "County Office Locator" is a little vague. I would like a better descriptor like "Type in your zip code to find your local BenefitsCal office" ”

Proposed Solution

Change the office lookup page title to read, "Find an Office" to be consistent with call-to-action wording on Homepage and Help Center. Add some direction copy on how to use the lookup tool.

Screens

Usability Testing Insights



Severity

Cosmetic

7 User Task Success
1 User Task Issues

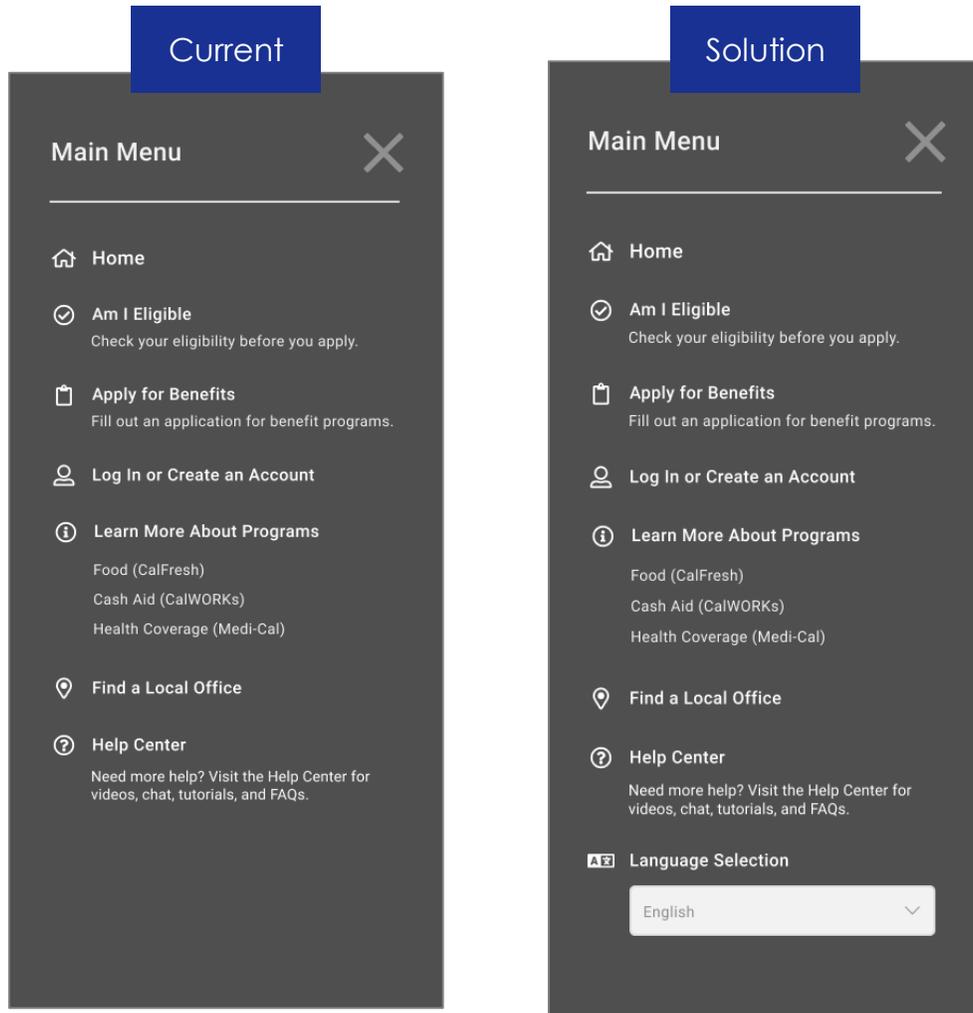
Observation

A customer was unclear if they had to select another field since they were not marked as required; was able to complete the task with no help but suggested changing the instruction language.

Proposed Solution

Simplify instruction wording and mark the field selection required to be consistent with the design pattern of other required fields.

Screens



Usability Testing Insights

Severity

Cosmetic

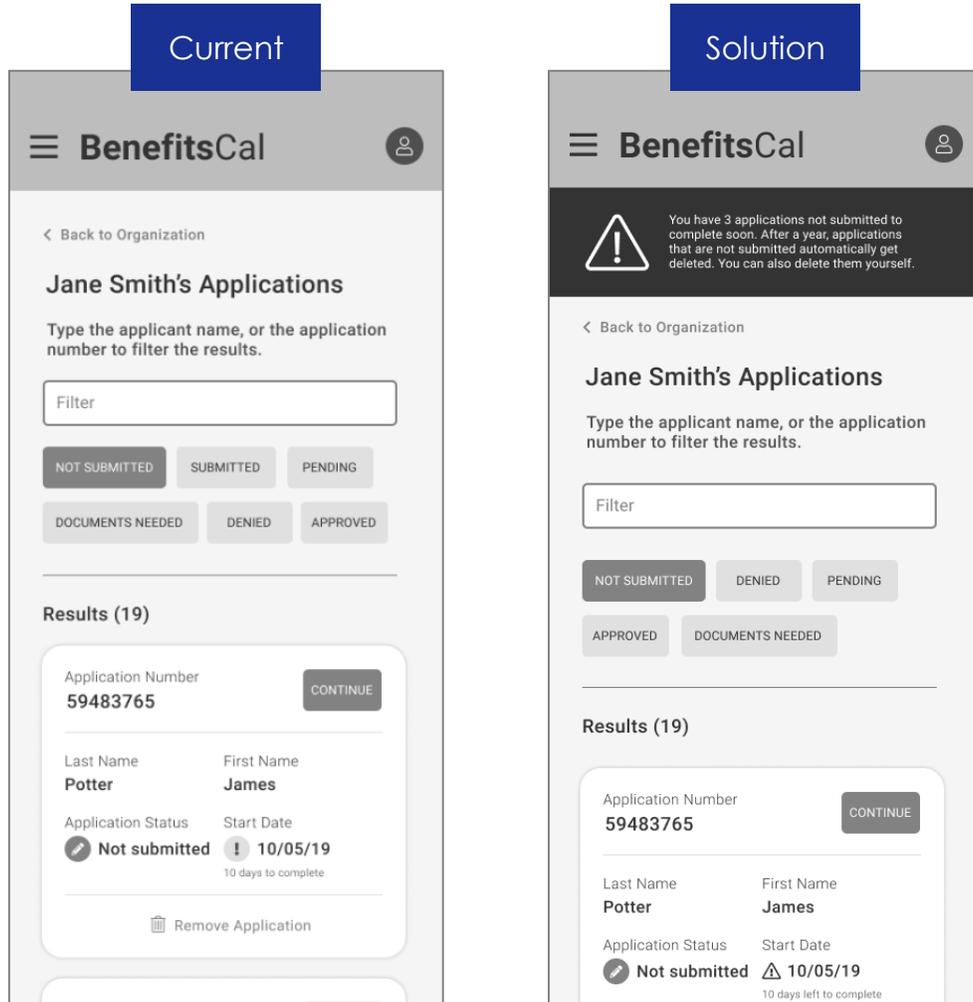
Observation

Although it was not a task, a customer was looking for the "change website" language function. They eventually found it in the footer but said they would expect to see it in the header or the menu, as well.

Proposed Solution

Add language selection to the mobile menu.

Screens



Usability Testing Insights

Severity

Cosmetic

5 User Task Success
1 User Task Issues

Observation

One CBO/FBO assister was unclear about what the exclamation point meant for not submitted applications, 1-year after it was started. She knew it meant that something was urgent but wasn't sure what.

“ When I see [the exclamation mark] my gut feeling is, 'is that telling me that there is an application number I need, or do I need to continue?' ”

Proposed Solution

Provide additional information about the 1-year deadline to submit applications. Prior to the 1-year mark, there will be a dynamic message that states the application will be purged if it is not submitted before the deadline.