User Feedback Testing Form: Voluntary Administration of Estate Form (MCP-170)

**Name of Tester:**

**Date of Testing**:

**General Feedback**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Provide a rating by putting an X in the corresponding box. | **Very good** | **Good** | **Fair** | **Poor** | **Very Poor** |
| How would you rate your overall experience with this form? |  | x |  |  |  |

Were there questions that **confused** you, or could be **worded** better? If so, which ones?

|  |  |
| --- | --- |
| **Question ID** | **Suggestion (wording, additional fields, etc)** |
| basic questions intro screen | Ask the court to allow you to manage a person's estate: MassAccess Project |
| Voluntary Administration of Estate | You need to ask the Probate and Family Court to allow you to manage the estate of someone who has died.  You can use the Voluntary Administration of Estate form If   1. the value of their estate, not counting a car, is $25,000 or less, 2. they did not have more than one car, and 3. they died more than 30 days ago   Does the estate include real estate? is this information part of the restrictions to the form? How is it relevant, why are we asking here?  Did the person who died have a car?  How many cars did they have?  show if yes they had a car  What is the value of their estate  make parts of this question conditional on their answers to car questions. |
| name of person | I like the question "What is the decedent's name?" It is short and requires people to read the subquestion if they do not know.  The decedent is the person who has died, whose estate you are answering questions about here.  The decedent is the person who died, and whose estate you are asking the court to let you manage. |
| What is the decedent's date of death? | **When did ${decedent} die?** You can find the date on ${decedent}'s death certificate.  I don't think the field needs a label. Or just put "date" |
| Does the decedent have a will? | If you ask the right questions in this question you can get the answer you need for the form: Select “Yes” if the original will and codicil(s) are in the possession of the court or accompany this statement, and you are unaware of any instrument revoking the will and believe it to be Cathy’s last will. Select “No” if you are unaware of any unrevoked will relating to property in Massachusetts.  Did Cathy have a will?  if yes  Do you have the original?  if no  Does the court have the original?  If no to both original questions - kickout  If yes to either...  Do you know of any documents Cathy signed that say the will is not valid?  If yes, kickout else.. As far as you know is the will ${ you or the court } have the last will Cathy wrote?  These last 2 questions could be reversed.  Once you get answers to all these questions, you should get the answer you need for the form. |
| decedent's address | Also we want to make clear in plain language that this is residential address not mailing address. Where was ${decedent} living when they died? the street, city etc labels indicate it's their address.  Not something to fix, but maybe add an issue - if decedent died at a dv shelter, information about putting in PO Box not physical address. |
| What is your relationship to the decedent? | for other relationship maybe make the label be, "I am ${decedent}'s : |
| Asset lists | I know you have had a lot of input on these questions about cars and assets and already, I hope, created a number of issues. We did not talk a lot about language here but I think these questions need readability reviews. In the question in each screen Give the court more information about - not this asset but the ${ variable } you pull into the text field. |
| vehicles description | No punctuation at the end of questions in the question section of a screen, unless the question actually **is** a question, then use '?' I think we can adjust the language of this question once we know how many vehicles decedent had and then ask about it or them referencing decedent - with reminder in subquestion about the various types of vehicles that count. |
|  | **Vehicles owned by household members** doesn't have a question id and needs to be adapted for your interview to ask only about decedent's vehicles -   1. question needs editing and 2. an id |
| id: names of people | check if we need to ask about business,  question needs mega editing to explain who an interested party might be  definitions need to be completed for the interests other interested parties may have |
|  |  |

Was there **functionality** of any questions that didn’t seem to work right? If so, which ones?

|  |  |
| --- | --- |
| **Question ID** | **Suggestion (appear earlier, later)** |
| Voluntary Administration of Estate | I was expecting to get some "kickout" screens after I answered f the questions in this screen, i.e. if value of estate is more than $25,000 I should not be allowed to continue - Or should get warning screen of some sort, not sure about the real estate.  We shouldn't have to ask the 30 day question as well as death-date - the computer can figure that out. |
| What is the decedent's date of death? | date needs to be limited - so they cannot answer a date that has not yet happened.  and like comment above, trigger a kickout screen if date is within 30 days of today |
| assets description | Oddly if I add another asset I get another field that is not really accounted for in the assets list and asked about the account - if my other asset is jewelry or a train collection this field doesn't make and I think the labels need to be edited to be clearer - |
| id: names of people | Interview does not progress if user picks business  Do you not need an 'other' for interested parties' interest? SME question |
| Have you sent a copy of this form to the Division of Medical Assistance | I think this is already in your issue list - needs discussion as you commented in screen - doesn't make sense to comment in this feedback form. |

Were there questions that seemed to come **out of order**? If so, which ones?

|  |  |
| --- | --- |
| **Question ID** | **Suggestion (appear earlier, later)** |
| name of person | Move up to be the 3rd question in the interview. then follow with What is the decedent's date of death?  Although the 30 day screening question is good to find out early on, since you need the date of death for the form it might make more sense for next question to ask decedent's name - |
| Asset lists | You ask user to list assets with car at the top of the list - see comments above, but I would start with cars. then if more than one ask the value of each, so you can delete the value of hte most expensive car from the total value of the estate and go on from there. |
|  |  |

Were there **terms** used that you didn’t understand or would have appreciated a definition or clarification? If so, which ones?

|  |  |
| --- | --- |
| **Term** | **Suggestion** |
| What is your relationship to the decedent? | Make all of the terms in the subquestion green words with help or make a help button, learn more what are these words at the bottom of the question, under the fields - replace "etc." with something like, or did you have some other relationship with Cathy. |
|  |  |
|  |  |

Any additional Feedback?  
I really love this feedback form - well done!

Excellent job in this assignment!

A couple more things

I think your interview is missing:

1. questions that allow users to acknowledge statements 10. and 11. in the form itself:
2. and I am not sure I saw a question for petitioner's phone number. If I did get asked and answered, it did not show up in the preview.

Finally, I did not run through the track if I were a lawyer - ran out of time.

Thank you so much for your time!