

Family Context Example Discussion Guide

Round 1 User Research

Research objectives:

- ≠ Understand social workers' preferred user journey
- ≠ Understand how comfortable social workers feel using the tool and if they have any concerns
- ≠ Understand if and how social workers use the relationships feature within their Case Management System
 - Do they link individuals themselves?
 - At what point in the process do they use it?

Introduction:

My name is X, I'm a User Researcher working on behalf of Social Finance. Thank you for taking the time to be part of our research today, I really appreciate it. My colleague X will also be present to take notes.

The Family Context project team are working with Leeds and Stockport council. The objective of the project is to ensure that social workers have the right information they need about a family in order to provide the right support to them.

We've developed a prototype of a tool to help achieve this objective and we're talking to some social workers to learn more about the child and family assessment process and test our prototype.

In this session I'd like to do two things: First, ask you a few questions about you and your experiences. Second, ask you to use the prototype alongside a new referral. The session will take no more than 1 hour of your time.

Do you have any questions about this?

Before we start, I have some questions:

- Are you ok with X taking notes today?
- Are you ok if we record the session?
- Are you ok for us to use quotes from the session?

Anything you say will remain anonymous and only be used by the immediate team.

Also please know that if you want to stop the session at any time, or not answer a question then you are allowed to do so.

Finally, if you have any more questions following today's session please contact the project team on: X

Contextual questions

Can you tell me a bit about yourself and your role?

- What are your responsibilities?
- What team do you work in?
- What area do you cover?
- How many children do you usually have on your caseload at any one time?

Do you use a Case Management System?

- What do you use the Case Management System for?
 - How often do you use it?
- Do you update the Case Management throughout a case?
 - What information do you update it with?

What is your knowledge of the relationships feature within the Case Management System?

- Can you talk me through how it works?
 - What are the mandatory fields you need to fill in to link an individual to a child?
- How often do you use this feature?
- (If they don't use it) Can you see people that have been linked to an individual?
 - Do you know who has added them into the system?

Testing the prototypes

Now we're going to move on to look at the prototype.

When using the prototype, please act as you would normally do. We ask that you think aloud as this helps us to understand your natural responses. It also is important that you are as honest as possible, because your feedback is really important to us.

I am going to give you a scenario for using the prototypes. Do you have any questions before we begin?

Scenario:

Imagine you've received a referral that's come through the front door. Please have a read through it.

Referral:

- How does this referral compare to the referrals you usually receive?
 - Does every referral contain a child ID?
- What would be your next step be after receiving this referral?
 - How do you use the Case Management System at this point?
 - What would you do after using the Case Management System?
- How would you find out what other individuals are relevant to the case?

Now, we're going to use the prototype. As this is a prototype, there may be things that don't work. For example, you are not able to type anything, but you are able to click where you would normally type. Please let me know if there is anything else that you would expect to be able to do or happen.

Remember this tool allows you to view individual's service involvement. I would like to use the tool to understand the service involvement of the individuals relevant to the case you have just received. You should use the information in the referral.

Prototype 1

Page	Question	Observe
Authentication	<ul style="list-style-type: none"> Can you show me what you would do on this page? How many different logins do you currently need to remember for work? <ul style="list-style-type: none"> Are they the same/ different? 	
Search	<ul style="list-style-type: none"> Can you show me what you would do on this page? Why would you search for the child in this way? What information do you usually have in order to search for a child? 	<ul style="list-style-type: none"> Observe any confusion around Case ID <ul style="list-style-type: none"> If there is confusion check the terminology they use
Search results	<ul style="list-style-type: none"> Can you show me what you would do on this page? How do you know who the correct child is? <ul style="list-style-type: none"> Do you need any further information in order to correctly identify the child? What information do you currently use to identify a child? How do these search results compare to what you see in the Case Management System? 	<ul style="list-style-type: none"> Observe if they select correct child Observe if they think it's the same person or different people, prompt if unsure
Child detail page	<ul style="list-style-type: none"> What would you do with this information? Is there anything missing from this page? <ul style="list-style-type: none"> Why do you need it? How valuable is it to have school information? <ul style="list-style-type: none"> (If yes) What value does it provide? Can you get this information from anywhere else? How does this compare to the information you have in the Case Management System? 	<ul style="list-style-type: none"> Observe if they search for mum next <ul style="list-style-type: none"> If not prompt them to do it: <i>"In the referral it talks about mum, could you show me how you would find out more information about the mother."</i>
Search	<ul style="list-style-type: none"> Can you show me how you would search for mum? 	<ul style="list-style-type: none"> Observe how they search for mum
Search results	<ul style="list-style-type: none"> Can you show me what you would do on this page? How do you know who is the correct person? <ul style="list-style-type: none"> Do you need any further information in order to correctly identify the mum? 	<ul style="list-style-type: none"> Observe if they select mum Observe if they try and click into the different results

	<ul style="list-style-type: none"> ○ What? ● Imagine you didn't have information on the address, can you show me how you would identify the correct person? <ul style="list-style-type: none"> ○ How comfortable are you into clicking into different results to get the correct one? 	
Adult detail page	<ul style="list-style-type: none"> ● Can you describe to me what information you're looking at? ● Is there any information missing from this page? <ul style="list-style-type: none"> ○ Why do you need it? ● Have you seen anything that has made you uncomfortable? ● Can you explain to me what you would do next? 	<ul style="list-style-type: none"> ● Observe if they click into the headings ● Prompt if needed: how would you find out more information about housing or social?

Scenario extended:

You've now found out about another relevant individual during the assessment process for example mum's partner, how would you find out their service involvement information on this tool?

- How would you search for them?
- How would you get the information you need to search?
 - e.g. how would you get the name or DOB?

Prototype 2

Scenario:

This version of the prototype uses the Case Management System's relationship feature. It works by taking the individuals that have been linked to the child in the Case Management System and displaying them in the tool.

Once again, I would like to use the tool to understand the service involvement of the individuals relevant to the case you have just received.

Page	Question	Observe
Authentication	No new questions	
Search	No new questions	
Search results	No new questions	
Child detail page	<ul style="list-style-type: none"> ● Can you describe to me what information you are looking at? ● Is it valuable to have these individuals listed? 	<ul style="list-style-type: none"> ● Observe if they click (or try to click) on any of the related individuals <ul style="list-style-type: none"> ○ If not prompt them to do it: <i>"In the referral it talks about mum,</i>

	<ul style="list-style-type: none"> ○ Why is it valuable? • Do you think all these individuals are relevant to the case? <ul style="list-style-type: none"> ○ Why or why not? ○ How would you feel if you saw their service involvement? • Can you show me what would you do next? 	<i>could you show me how you would find out more information about the mother."</i>
Adult detail page	No new questions	

Scenario extended:

You've now found out about another relevant individual during the assessment process for example mum's partner, how would you find out their service involvement information on this tool?

- Once they've explained how they would do it: How would you feel if it took 24 hours for the tool to update with the information in the Case Management Systems so that you could see any new linked individuals?
 - What impact would this delay have on your work?

Wrap up questions

- Can you describe the differences to me between the two prototypes you have used today?
- Which prototype do you prefer and which prototype do you find to be the most useful?
 - Why?
 - How would it change your current work process?
- Do you think you would be comfortable using said prototype in your day-to-day work?
- Do you have any final pieces of feedback?

Please note: this is a prototype, so the finished product might look different, although the function should remain the same.