

Content suggestions

I'll caveat these suggestions by noting that everything I'm recommending could contradict things you've learned in testing or other constraints. If that's the case, please ignore them! Or just ignore them anyway. A lot of these are intended to be things to think about, rather than a firm recommendation.

I also haven't checked the error text as [good resources on how to write them](#) already exist.

One thing that is worth looking at is the consistency in page titles. I noticed that some are instructions (Enter your...), and some are categories (2019 tuition). From my experience of studying users, they tend to start setting expectations about the format or expected format of page elements early on in a transaction, so it helps them if we try to maintain one throughout.

<https://claim-tax-benefits.azurewebsites.net/start>

Question: Should we use "code from" or "code on" ?

Either work. However, if you know how long or in what format the code will be, you could be more specific, e.g. "• the 9-digit code from the invite letter CRA sent you"

In case people just scan this page instead of reading it, I'd consider putting more in your call to action button. 'Check now' without context might not make sense on a page called 'File taxes...'. You could expand it to 'Check if you can use this service'. It's lengthy, but worth thinking about.

Otherwise, a nice concise start page!

<https://claim-tax-benefits.azurewebsites.net/eligibility/age>

This may be a British English thing, but do you folks say "...were you aged 65 or older?" when talking in the past tense? Alternatively, you could remove the 'age' altogether, given that it's your page heading.

<https://claim-tax-benefits.azurewebsites.net/eligibility/taxable-income>

Is 2019 January 1st to December 31st, or is it the [tax year](#)? April to March?

<https://claim-tax-benefits.azurewebsites.net/eligibility/residence>

The line defining “Principal residence” stands out to me. I understand why you’ve done it – to prepare people for the following question. I wonder whether we can rearrange the flow of information a bit so we change the title from ‘Province or territory’ to ‘Where you usually lived’ or ‘Your main home’. Then you could remove the definition line, and change the question to:

“On December 31, 2019, was the place you usually lived (your ‘principal residence’) in Ontario?”

This is assuming you have to keep the term ‘principal residence’ to satisfy a CRA need.

<https://claim-tax-benefits.azurewebsites.net/eligibility/children>

Again, might be a British English thing – over there we’d say “...did you have a child or children under the age of 18?” You could shorten it by saying “...did you have any children under the age of 18?”

Up to you though!

<https://claim-tax-benefits.azurewebsites.net/eligibility/dependants>

Funny how that CRA page doesn’t specify what supporting a dependant is, or that much about who is an eligible family member. It mostly seems to define what it considers marital status to be. Anyway.

I assume testing showed that people understood how to answer this question. As with my ‘principal residence’ suggestion, I’d prefer if we didn’t have to explain terminology to users, but I understand that’s something we have to do to satisfy CRA. Regarding the ‘Learn about...’ link, I wonder whether it should open in a new tab (with a note of that behaviour), or if the CRA text could live in a progressive disclosure drop down (like you have on the /eligibility/success page)? There could be concerns that it takes people out of the transaction and lose their place/entered information.

Does the answer to the children under 18 question have any effect on this question? Can dependants be over 18?

Oh! I just noticed that the CRA page is a series of questions!! Oops. It looks more like a glossary than a set of questions.

<https://claim-tax-benefits.azurewebsites.net/eligibility/tuition>

No comments.

<https://claim-tax-benefits.azurewebsites.net/eligibility/income-sources>

No comments.

<https://claim-tax-benefits.azurewebsites.net/eligibility/foreign-income>

This might benefit from an example of a common source of foreign income, but I wouldn't consider it essential.

<https://claim-tax-benefits.azurewebsites.net/eligibility/success>

Question: Should it be “code from” or “code on” ?

As with the screening start page, something like: “• the 9-digit code from the invite letter CRA sent you”, if you can.

I slightly wondered about the phrasing of ‘check that it is you’, but alternatives such as ‘check your identity’, ‘verify your identity’ are perhaps more complex.

In the progressive disclosure area (‘Learn about rent receipts’), do we know that users want to know the specific law that applies here? The link to the Tribunals Ontario site doesn't give anything particularly quotable. If your landlord is trying to charge for receipts, maybe the more useful thing to have is the name of the law and subsection: “Actually Landlord, The something something Act, section 4 says you have to give them for free”. Your research may differ, though.

You can tighten up the sentence (if needs be) by saying “In Ontario, your landlord must give receipts for your payments if you ask for them, for free.” You could also add, “If they refuse, refer them to The Residential Tenancies Act section *x*.” It's an option.

If you retain a link to another site, I'd try to use link text instead of the URL, I'd also recommend opening in a new tab and putting “(opens in a new tab)” in the link text, for accessibility (predictability).

<https://claim-tax-benefits.azurewebsites.net/login/code>

“Your code is in the CRA letter with this website link.” – does this mean the code is in the link itself? What is the link? Is the letter recognisable by having a link in it? Are there other characteristics of the letter which would help the user identify it?

<https://claim-tax-benefits.azurewebsites.net/login/sin>

Might be a typo in the progressive text link and the page title: the ‘S’ in ‘social’ is uppercase.

<https://claim-tax-benefits.azurewebsites.net/login/dateOfBirth>

The order of dates is more commonly month, day, year in Canada, isn't it? Also, the hint text giving a date example could maybe indicate which of those numbers is which, if day/month/year, then something like '24 09 1977' might be more useful.

<https://claim-tax-benefits.azurewebsites.net/personal/name>

No comments.

<https://claim-tax-benefits.azurewebsites.net/personal/address>

There's a switch between 'Check your name is correct' and 'Is this your name?', to 'Check your mailing address' and 'Is this your correct address?'. If you can, I'd pick one or the other and be consistent with it. So maybe, 'Check your address is correct' then, 'Is this your mailing address?'

<https://claim-tax-benefits.azurewebsites.net/personal/maritalStatus>

It becomes more difficult to follow the pattern for page title and question here. You could change the title to 'Check your marital status is correct'. But phrasing the question without including 'correct' is more awkward. One way of doing it could be to pull the marital status variable into the question, e.g. "Are you currently single/divorced/separated?" (whichever is relevant), or, "Is 'single' your current marital status?"

Something to think about.

<https://claim-tax-benefits.azurewebsites.net/deductions/climate-action-incentive>

Unless 'census metropolitan area' is a particularly well known term, do we have to use it? I wonder if we can take focus away from the terminology. Really, we just want to know where the user's main home is (I assume we can't use their mailing address because it might not be their main home).

Instead of using the CMA term as the page title (which users may not recognise), how about something like 'Where your main home is', or 'Where you usually lived in 2019' or similar?

As with the earlier Ontario residence question, I wonder if we can avoid a definition line. With this question, do all of the user's principal residences need to have been in a CMA throughout the year? If their principal residence was in Ontario but not a CMA zone for a month, for example, but their next principal residence was, could they answer 'yes' to this question? I ask because the line

about only having one principal residence at a time doesn't seem relevant to the CMA question (though I expect it is relevant to the subsequent questions). It might just be because I don't understand it! :)

You could then skip straight to a question like: "In 2019, were any of your main homes in this list of areas?" with hint text: "Check the list of areas below."

It is an imperfect solution, admittedly. I'll mull it over and see if anything springs to mind.

I'd also consider calling it out as terminology, so putting it in inverted commas or quotation marks – unless you know it to be a well known/used term.

<https://claim-tax-benefits.azurewebsites.net/trillium/rent>

No strong feelings about this page, but if you decide not to persist 'principal residence' as a term, you could use the plain language version here, e.g. "...did you pay rent for your main home (the place you usually lived)?"

<https://claim-tax-benefits.azurewebsites.net/trillium/rent/ontario>

Have we already established that their main home is in Ontario? Is this for the circumstance where they had a main home in 2019 that was outside of Ontario?

<https://claim-tax-benefits.azurewebsites.net/trillium/rent/amount>

Is it possible to turn the first line into an action? Maybe something like, "Make sure you have your rent receipts available as you might be asked to show them in future."

I made a comment about the 'Learn about rent receipts' link under the eligibility success page.

<https://claim-tax-benefits.azurewebsites.net/trillium/propertyTax>

No comments on this one.

<https://claim-tax-benefits.azurewebsites.net/trillium/propertyTax/ontario>

I'd ask the question that I asked about renting in Ontario, if I hadn't already asked it ;)

<https://claim-tax-benefits.azurewebsites.net/trillium/propertyTax/amount>

The page title could maybe benefit from a 'the', such as "Enter tax on the home you owned".

Is it possible to turn the first line into an action?

Does the user need to know that property tax combines municipal and school taxes when calculating what they paid? How would they find out how much property tax they paid?

<https://claim-tax-benefits.azurewebsites.net/trillium/longTermCare>

I'd maybe change the first line to: "...was your principal residence in a long-term care home...", unless there's a chance they can be eligible for this outside of a care home.

<https://claim-tax-benefits.azurewebsites.net/trillium/longTermCare/ontario>

No comments on this page :)

<https://claim-tax-benefits.azurewebsites.net/trillium/longTermCare/type>

The page title looks a little hyphen-heavy to me, and may be difficult to scan. When we talk about 'management' here, is it about ownership of the home, and/or the care is offered at a discounted rate? Perhaps the title could reference the 'management' aspect, and the question can be more specific. So something like "Management of your care home", then the question could be something like: "Who ran your long-term care home?", and 'charity', 'city' etc could be radio options, or you could keep it as a yes/no and phrase it as: "Was your long-term care home run by a charity, city, First Nations, or other similar organization?"

<https://claim-tax-benefits.azurewebsites.net/trillium/longTermCare/cost>

For consistency's sake, I'd refer to it as a 'care home' rather than 'home' in the question. I trip up on "...home list..." when reading it for some reason. I wonder if we can move some of the clauses around so we can avoid that formation. Such as: "Are room and board listed as a separate line on your care home receipts?"

<https://claim-tax-benefits.azurewebsites.net/trillium/longTermCare/type/roomAndBoard>

Instead of "The government might ask for your long-term care receipts." how about "Make sure you know where your long-term care receipts are – the government might ask you for them in the future."

<https://claim-tax-benefits.azurewebsites.net/trillium/longTermCare/type/amount>

As with the room and board question, it's worth trying to make the first sentence an instruction.

<https://claim-tax-benefits.azurewebsites.net/trillium/energy/reserve>

I remember the reason for referencing the 'Indian Act' – completely makes sense. I wonder if we could shorten it slightly by saying, "...residence on reserve land created under the 'Indian Act'?". I think we need to call out that it's a name of legislation, and not language we'd use, by use of inverted commas or quotation marks.

<https://claim-tax-benefits.azurewebsites.net/trillium/energy/reserve/ontario>

No comments on this one.

<https://claim-tax-benefits.azurewebsites.net/trillium/energy/cost>

No comments on this one, though probably doesn't need the 'Learn about principal residence' link (unless research shows otherwise).

<https://claim-tax-benefits.azurewebsites.net/trillium/energy/cost/amount>

As other receipt references haven't mentioned what the receipts should cover, I'm assuming there was a reason this one specifies energy costs?

<https://claim-tax-benefits.azurewebsites.net/vote/optIn>

This page is a good idea. Is the blue callout necessary? If an introduction is necessary, you could say "You can register to vote or update your voter information when you file your taxes."

<https://claim-tax-benefits.azurewebsites.net/confirm-income>

Is this page a double-check? At this point do we know what the user's income is?

<https://claim-tax-benefits.azurewebsites.net/checkAnswers>

Good check answers pattern. Was 'review' better recognised than 'edit' as an option to go back and change answers?

Summing up at the bottom is good, though I note that you've gone with lowercase bullets here, but bullets starting with a capital letter elsewhere. I prefer the format here, as bullets are reformatted comma delimited lists.

<https://claim-tax-benefits.azurewebsites.net/confirmation>

What does the 'notice of assessment' look like? Is it something that comes through the mail? If so, you could say, "You'll get a letter through the mail in about 2 weeks that proves you filed your taxes. It also tells you if you need to pay tax. This letter is called a 'notice of assessment'."

It's worth extending the link text from 'register' to 'register for CRA direct deposit'. That way it makes sense to screenreaders out of context.

In the benefits and credits table, can the middle and right hand columns start with capital letters? I'm all for lowercase wherever possible, but they look a bit like they are the continuation of a sentence that began elsewhere.

I was about to suggest the 'learn more' link text should include the benefit they talk about, but then I noticed they cleverly use the 'visually-hidden' class. Nice!

Does the user only get shown benefits that are relevant to their answers, or are they always shown the full list?

<https://claim-tax-benefits.azurewebsites.net/offramp/maritalStatus>

Link text:

The full sentence can be a link, instead of the action word e.g:

[Learn if you can use a tax clinic.](#)

[file online with NETFILE](#)

[Learn which certified NETFILE software is free](#), and [check if you can use NETFILE](#).