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Progress Tracker

UT 1 and UT2 comparison

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Canada

Executive summary

This test was exploratory to see how the Progress Tracker (PT) redesign affected the tasks tested in baseline testing (UT1).

Testing:

- ▶ The tasks were initially prepared by the CRA for the first iteration.
- ▶ Shumac recruited 8 participants
- ▶ Shumac used Loop11 to carry out the usability tests. This tool supports remote monitoring and task time stamping and, in principle, also captures first clicks and the path taken by the user during a task.

Test methodology:

- ▶ The characteristics of the participants were:
 - ▶ Male: 43%, female: 57%
 - ▶ Province of origin: Ontario (85%), Other (15%)
 - ▶ Age: 25-34 (12,5%), 35-44 (62,5%), 55-64 (25%)
 - ▶ Occupations were varied (social services, information technology, administration and corporate operations, visual story teller), with 2 users being actual representatives for commercial and personal clients
- ▶ Metrics:
 - ▶ Task success
 - ▶ Time on task
 - ▶ Ease of use

Purpose

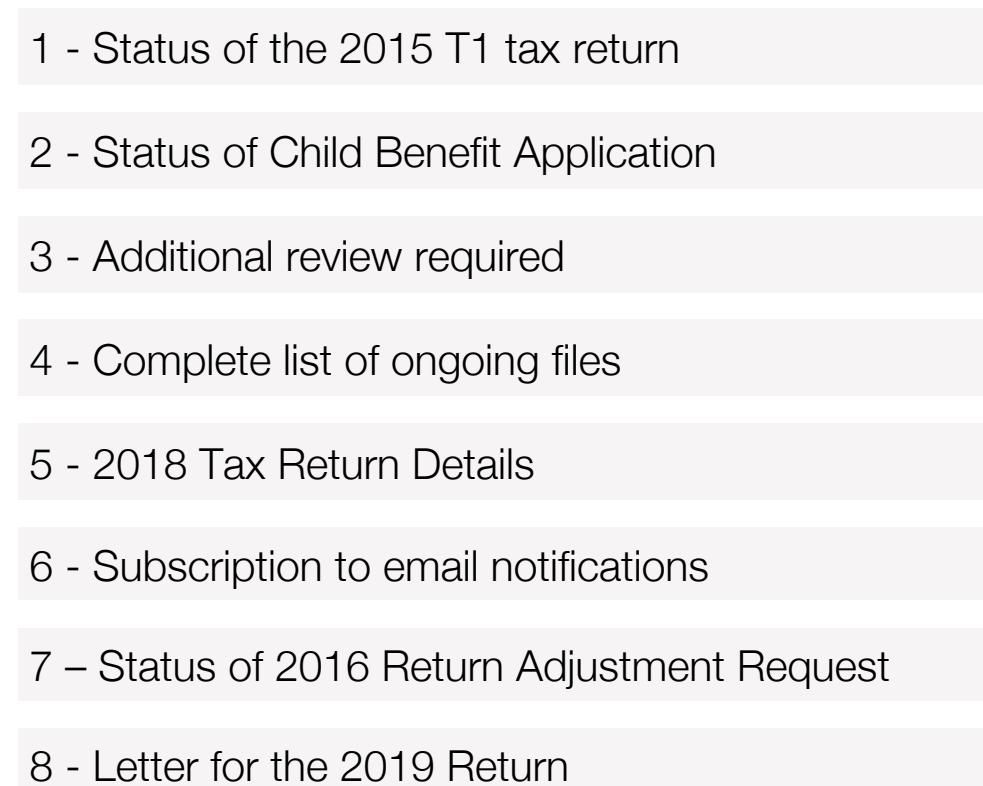
This UX Scorecard will:

- ▶ This UX Scorecard will detail the results of a series of usability tests carried out for the Progress Tracker (PT) project. The report is structured as follows:
 - ▶ Task results
 - ▶ Comparative results based on UT1
 - ▶ Issues and recommendations
 - ▶ High level observations and recommendations
- ▶ Note that a more comprehensive report (provided by Shumac) will be issued at the end of the project and that modifications or additional information may be provided at that time.

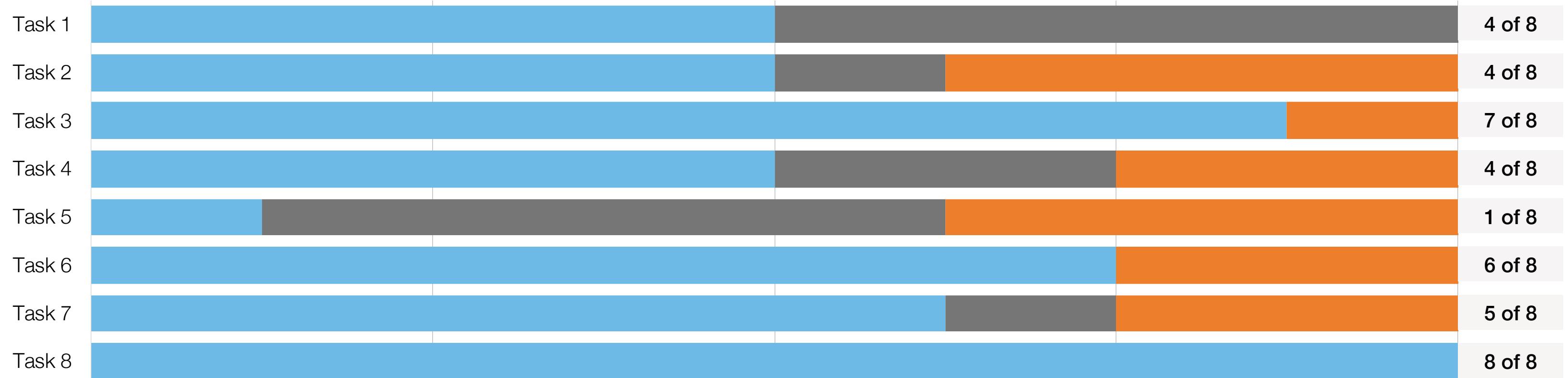
Summary of results

Success Minor Mistake Fail

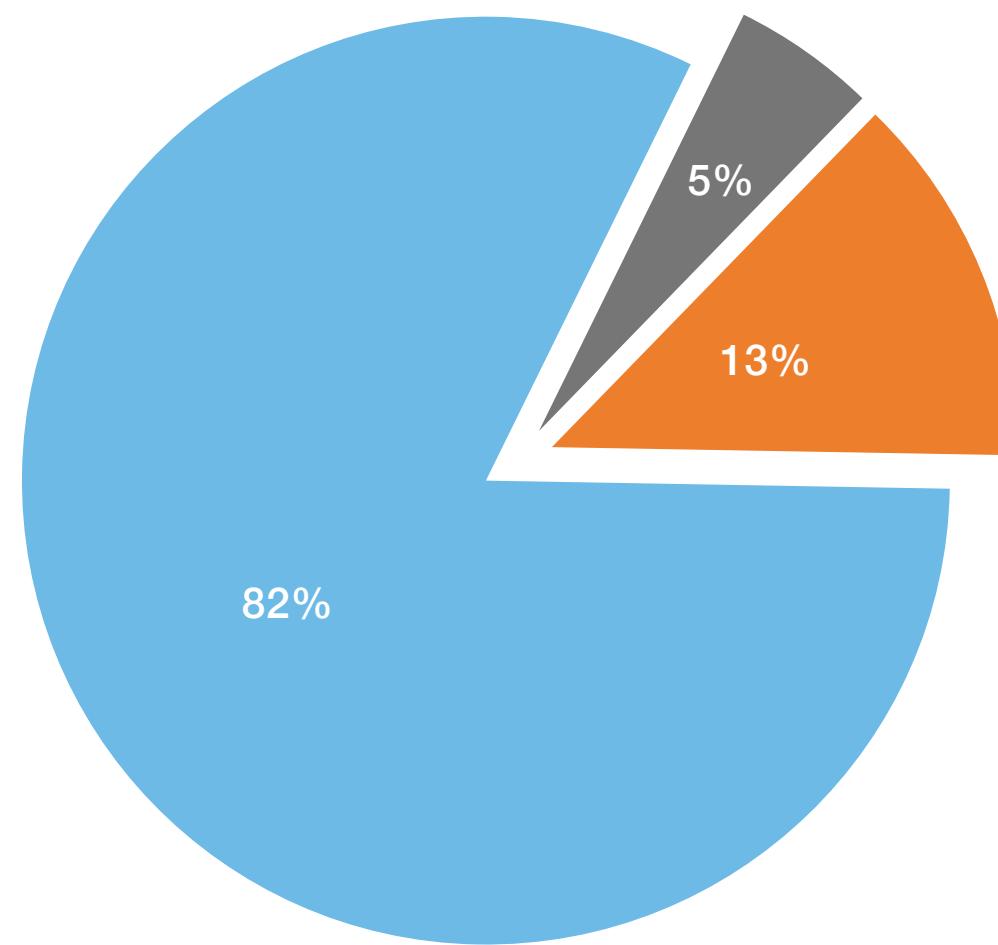
Task names



Task success



Task success percentage



Time on task

	User 1	User 2	User 3	User 4	User 5	User 6	User 7	User 8	Average Time
Task 1	5m 16s	2m 37s	6m 45s	6m 27s	3m 50s	7m 56s	3m 8s	6m 25s	5m 18s
Task 2	0m 25s	2m 13s	3m 4s	3m 40s	2m 28s	3m 36s	1m 35s	3m 53s	2m 37s
Task 3	1m 19s	1m 40s	5m 51s	3m 24s	1m 58s	13m 39s	2m 3s	2m 38s	4m 4s
Task 4	1m 0s	1m 44s	10m 4s	9m 27s	6m 3s	4m 12s	3m 1s	3m 21s	4m 52s
Task 5	3m 23s	1m 53s	3m 8s	4m 20s	5m 29s	2m 24s	3m 1s	6m 32s	3m 46s
Task 6	1m 2s	1m 4s	1m 52s	4m 20s	2m 30s	8m 16s	1m 10s	1m 43s	2m 45s
Task 7	1m 30s	2m 57s	2m 17s	1m 51s	2m 30s	3m 26s	3m 46s	2m 42s	2m 37s
Task 8	0m 44s	1m 12s	0m 50s	1m 19s	1m 20s	3m 4s	0m 49s	1m 12s	1m 19s

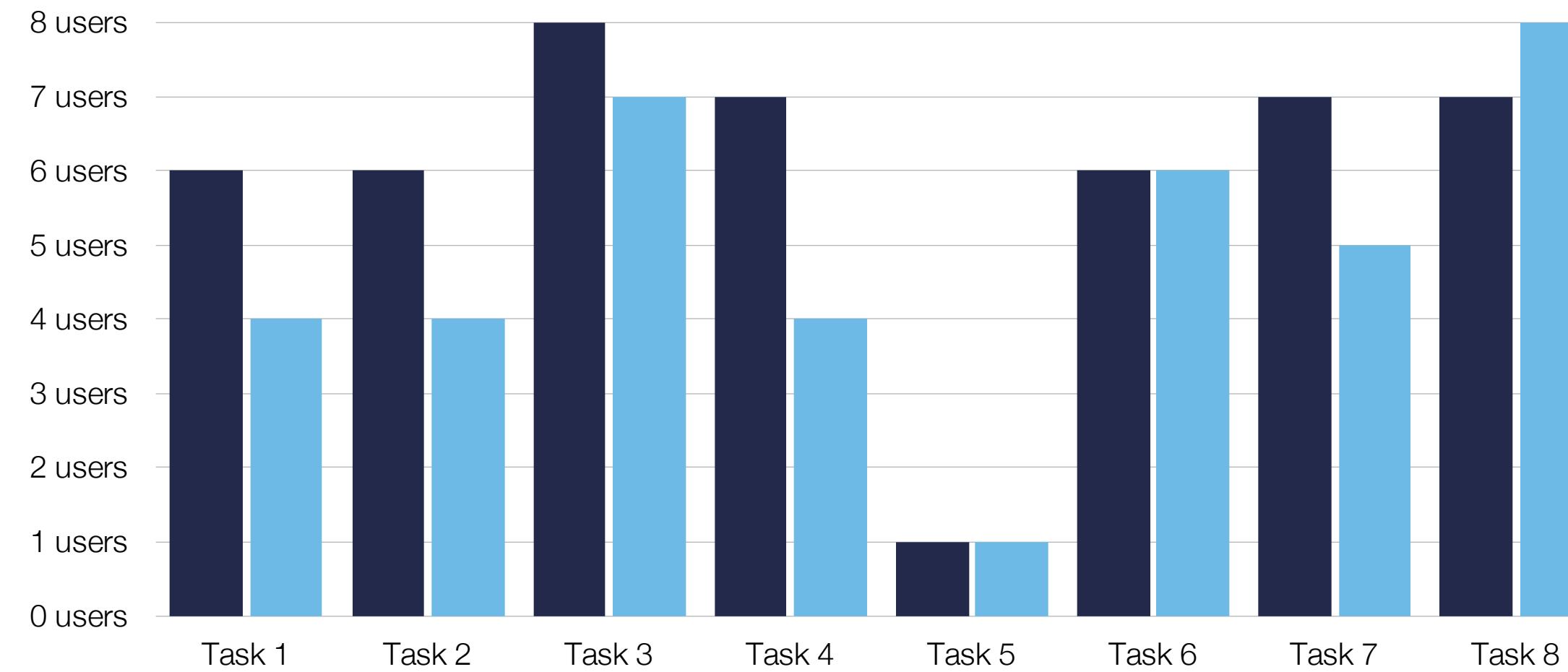
Overall comparative results

User Test 1 User Test 2

Task completion

23% ↓

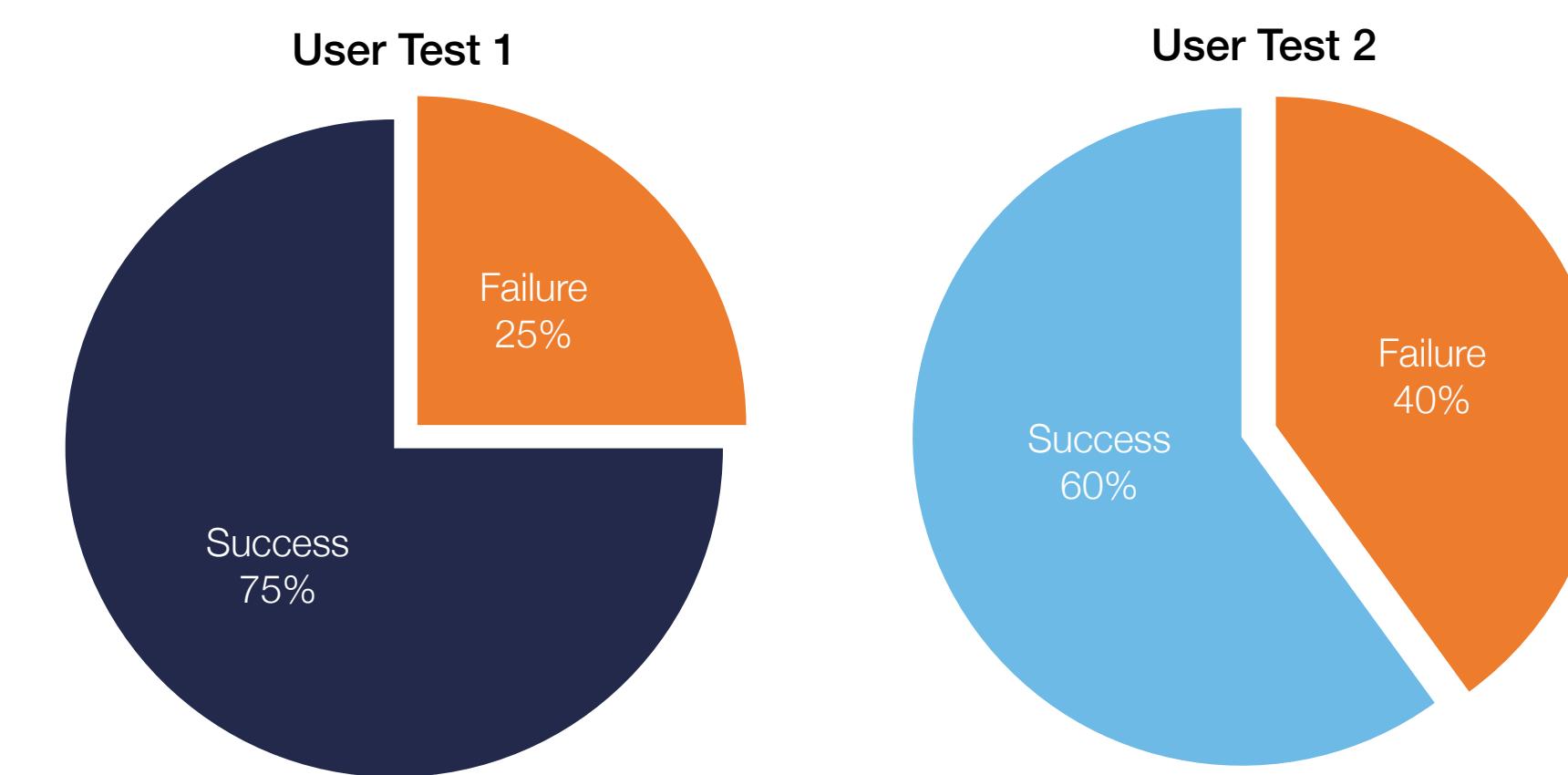
Decrease in
task completion



Average success rate

20% ↓

Decrease in
success rate



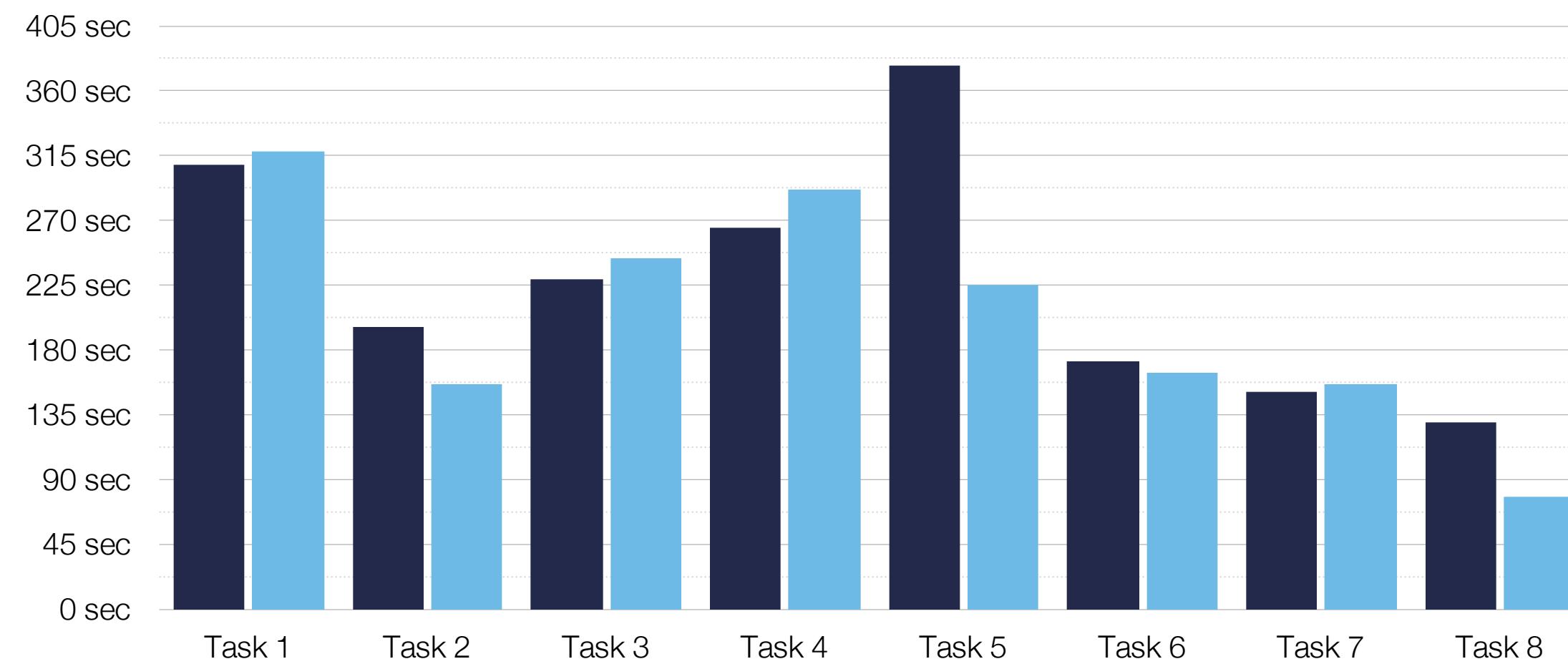
Overall comparative results - cont.

User Test 1 User Test 2

Average time on task

11%
↓

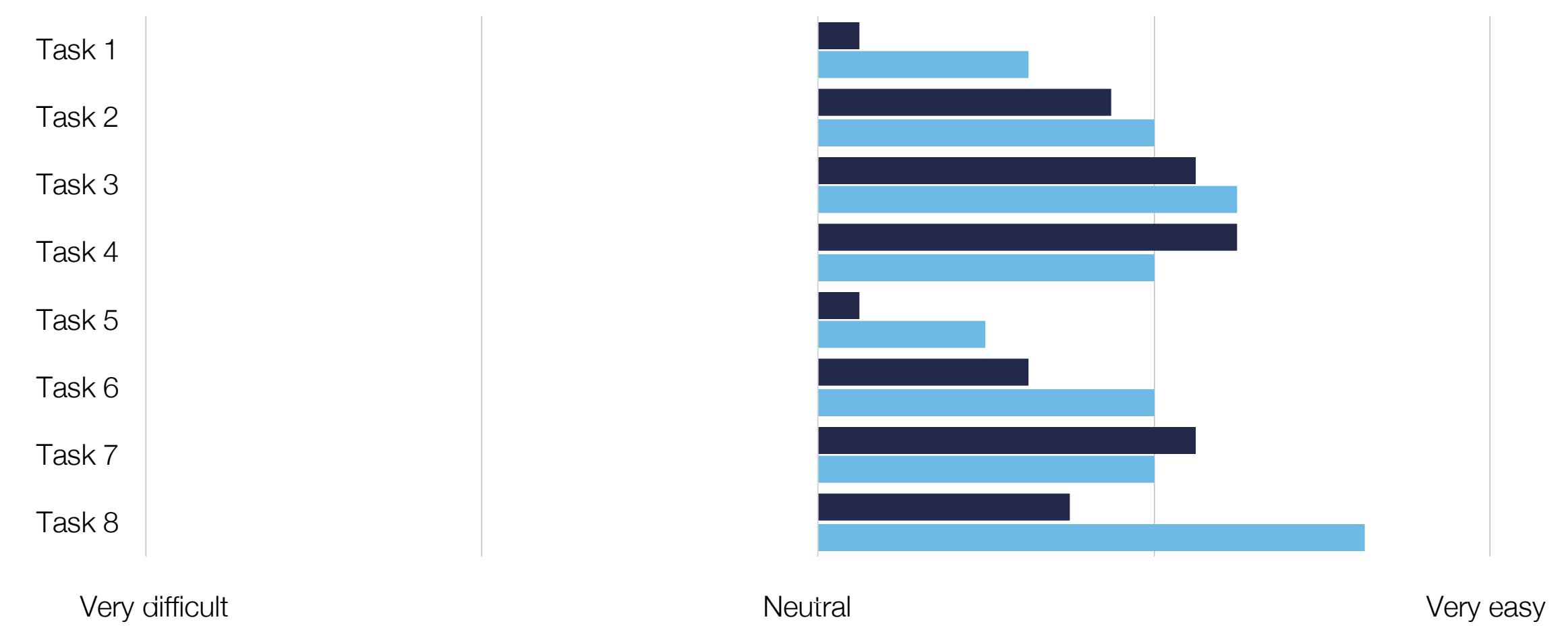
Reduction in
time on task



Average task usability

33%
↑

Increase in
ease of use



Task 1 - Status of the 2015 T1 tax return

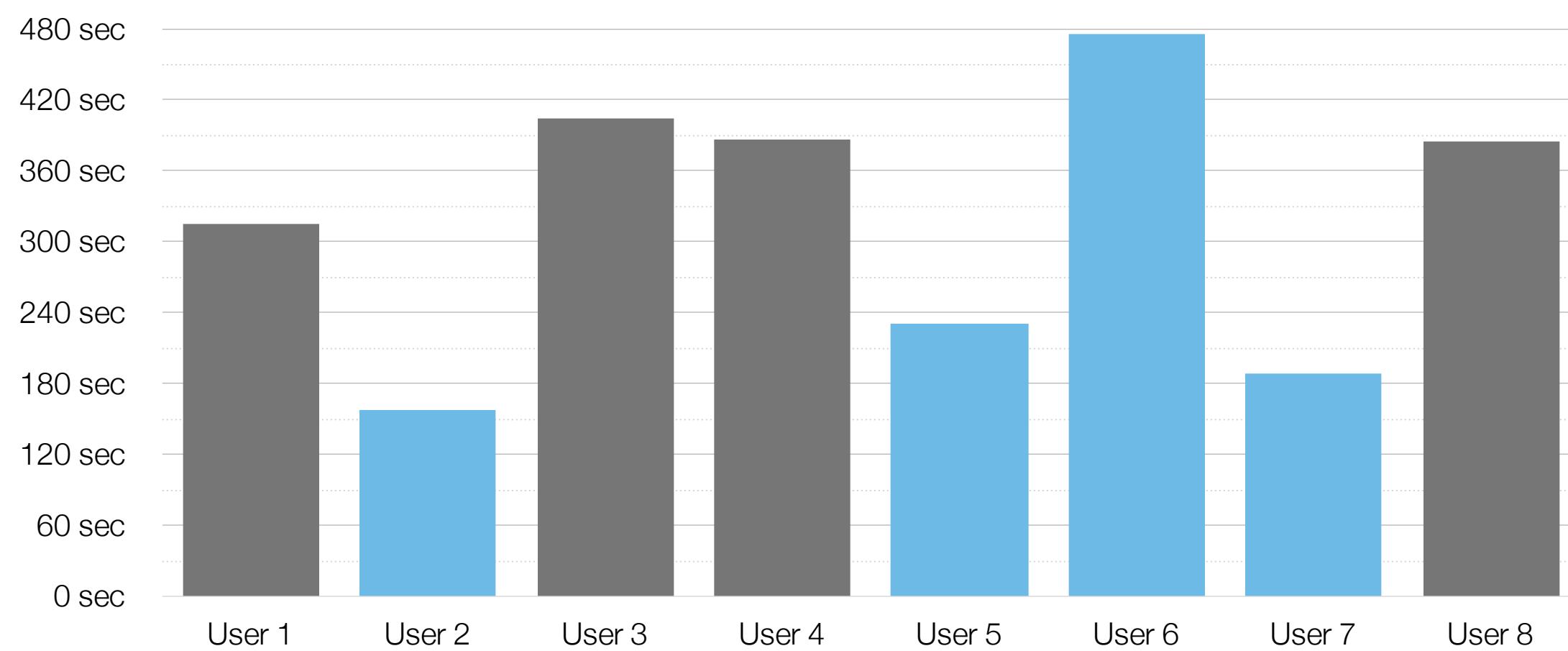
■ Success ■ Minor Mistake ■ Fail

*Find out the next step in
processing your 2015 T1
tax return.*

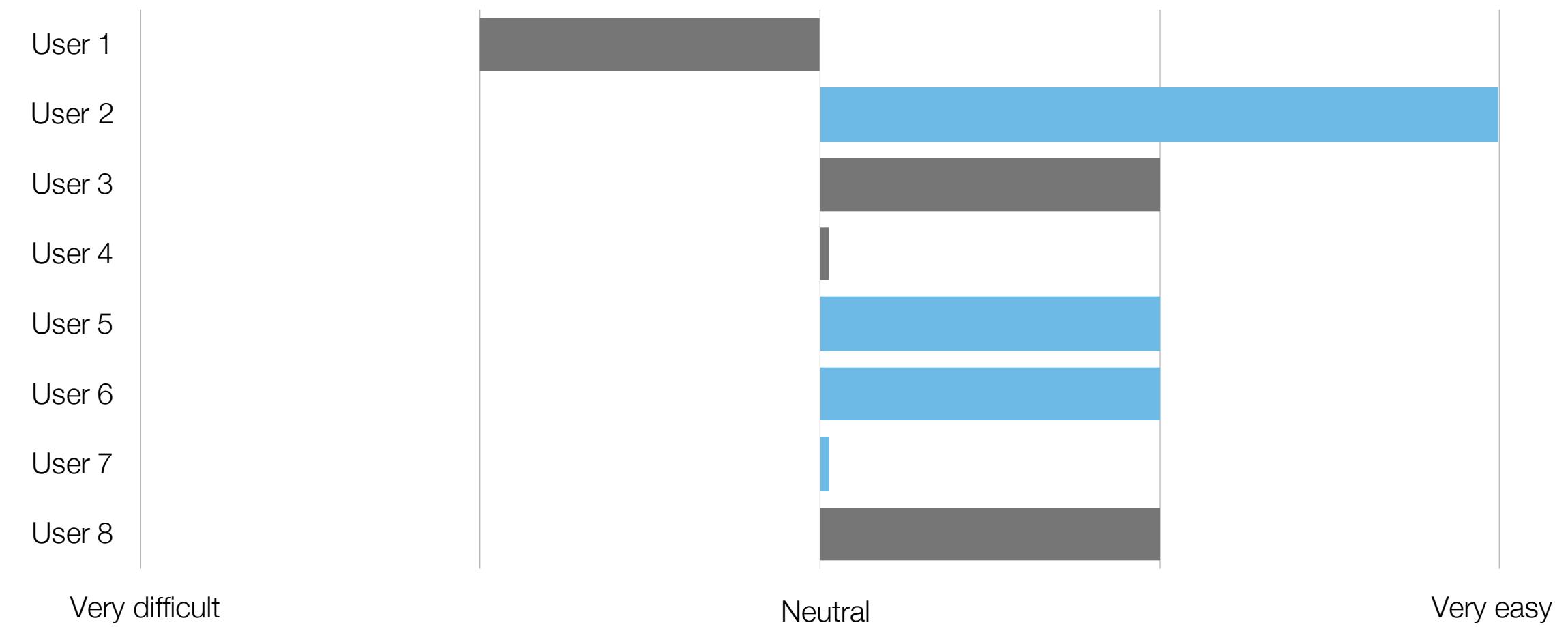
4/8

Users were
Successful

Time on task



Perceived ease of use



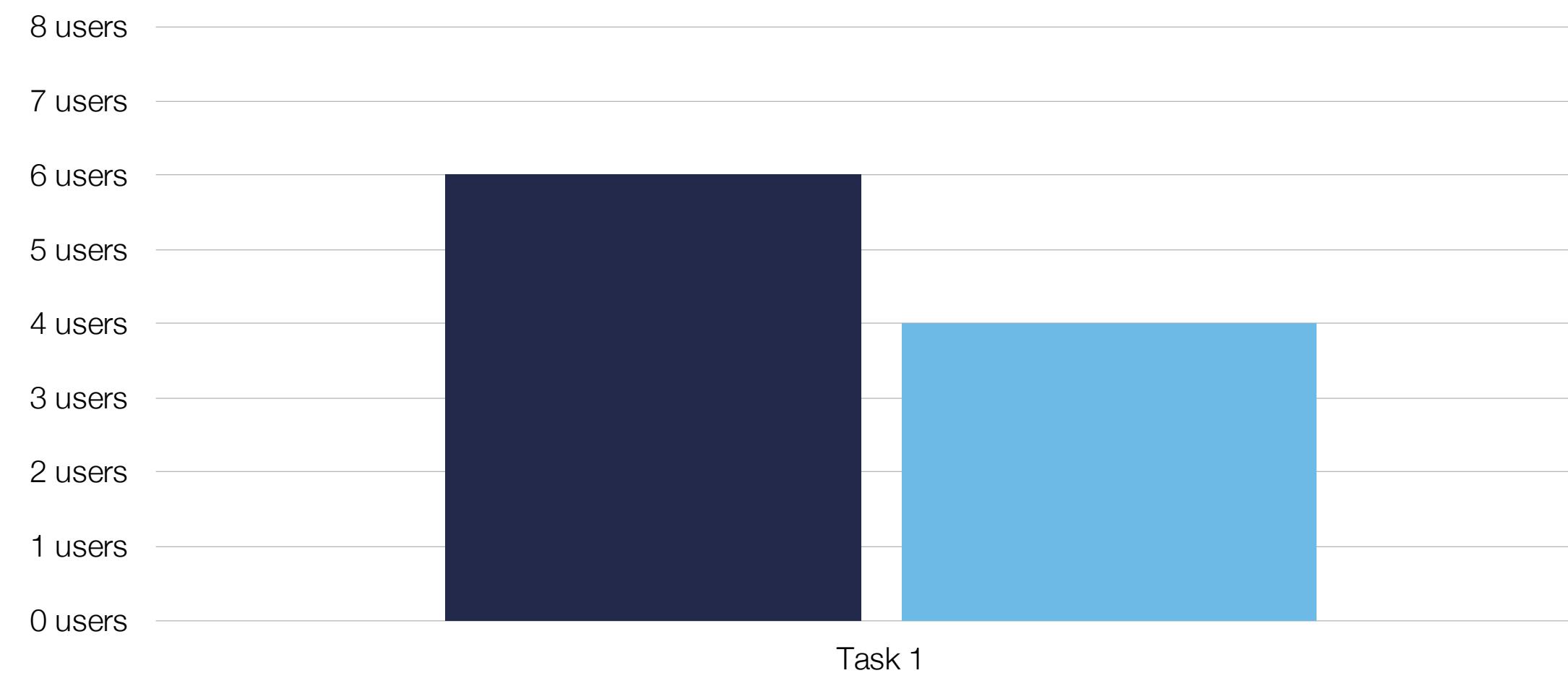
Task 1 - Status of the 2015 T1 tax return comparison

User Test 1 User Test 2

Task completion

33% ↓

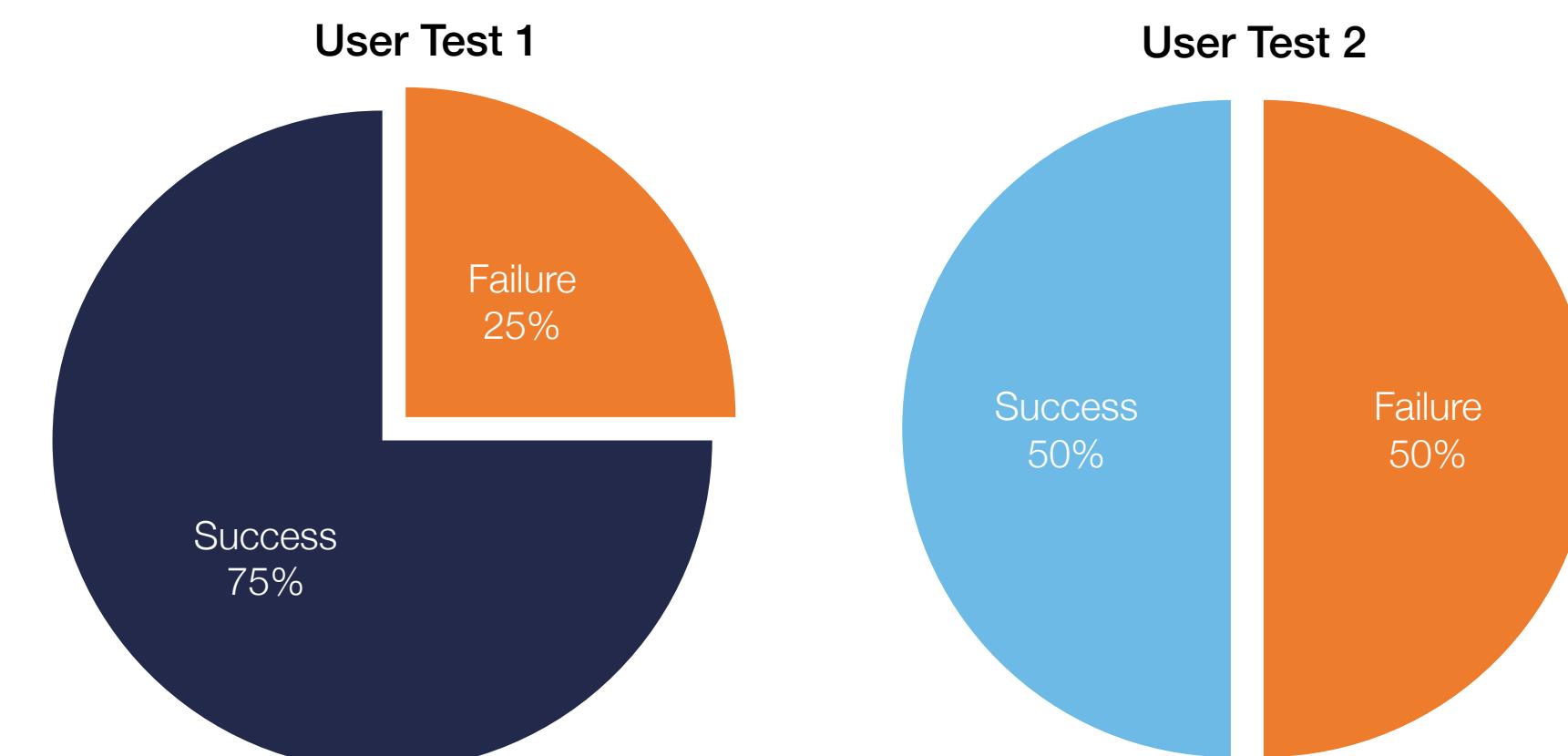
Decrease in
task completion



Average success rate

33% ↓

Decrease in
success rate



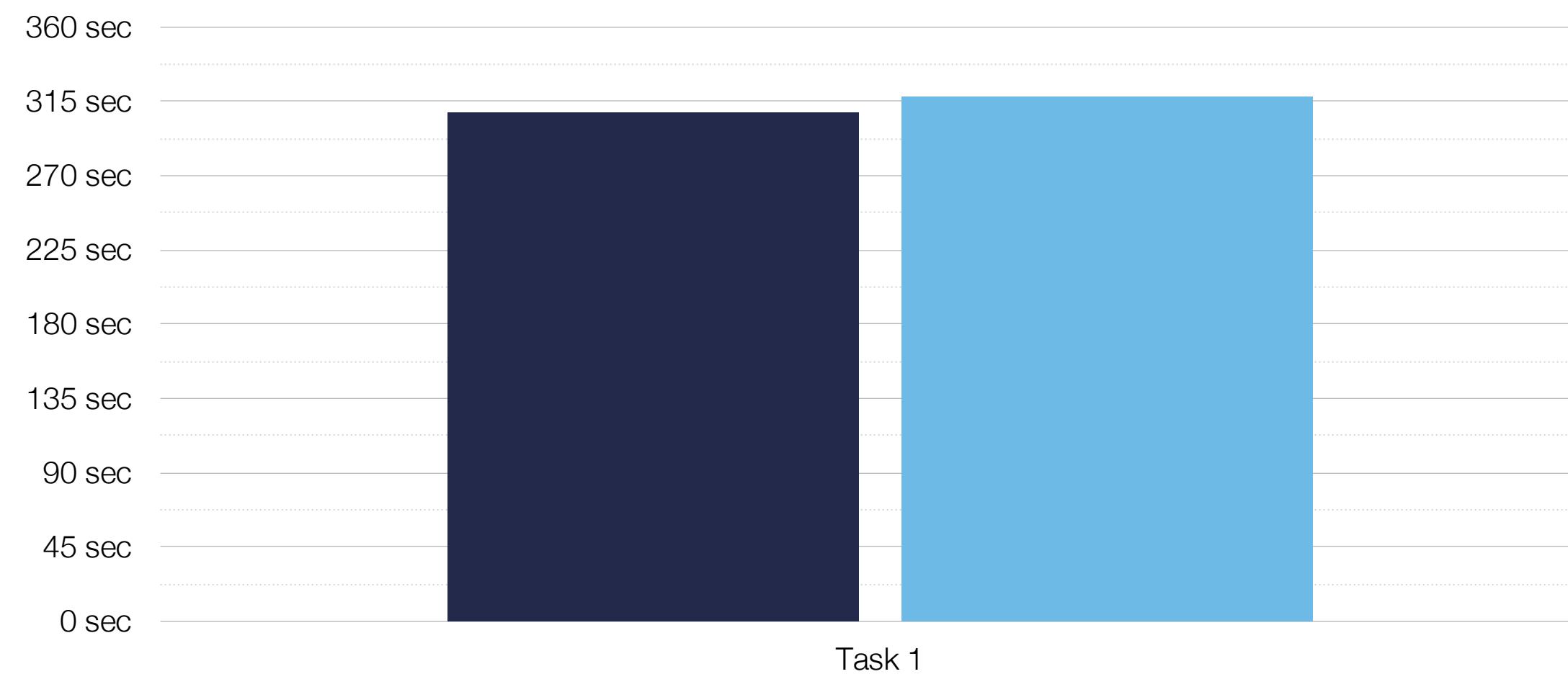
Task 1 - Status of the 2015 T1 tax return comparison - cont.

■ Baseline Test ■ Retest

Average time on task

3%
↑

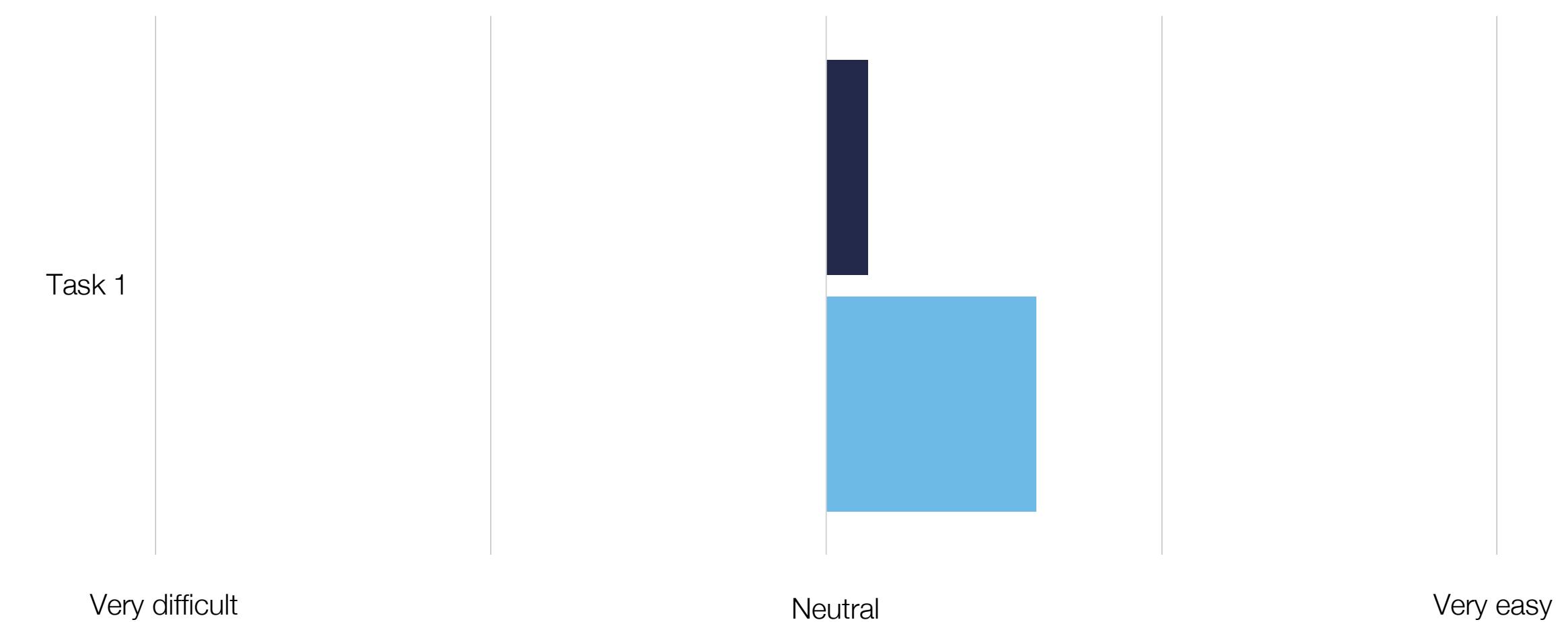
Increase in
time on task



Average task usability

400%
↑

Increase in
ease of use



Task 1 - Status of the 2015 T1 tax return - cont.

Observations

- ▶ Every participant, except one, believe that the information will to be under “Tax returns.” This is an example of the issues that arises from separating the information on a “topic” from the information on the progress for a given “topic.”

“I would suggest putting the targeted date at the end of the timeline [...] I completely missed that.”

“My first instinct is to look on the link (Tax returns).”

“It seems that there is a double meaning for certain things like tax returns and Progress Tracker, all the info should be under the tax returns, and when I click on tax return, I would have the PT.”

Recommendations

- ▶ Consider merging the progress on a topic within the content of the topic itself, rather than having a separate Progress tracker. See the sub-Section High-Level Issues for a longer discussion on this item.
- ▶ One participant suggested to have the PT within the Tax returns box.

Task 2 - Status of Child Benefit Application

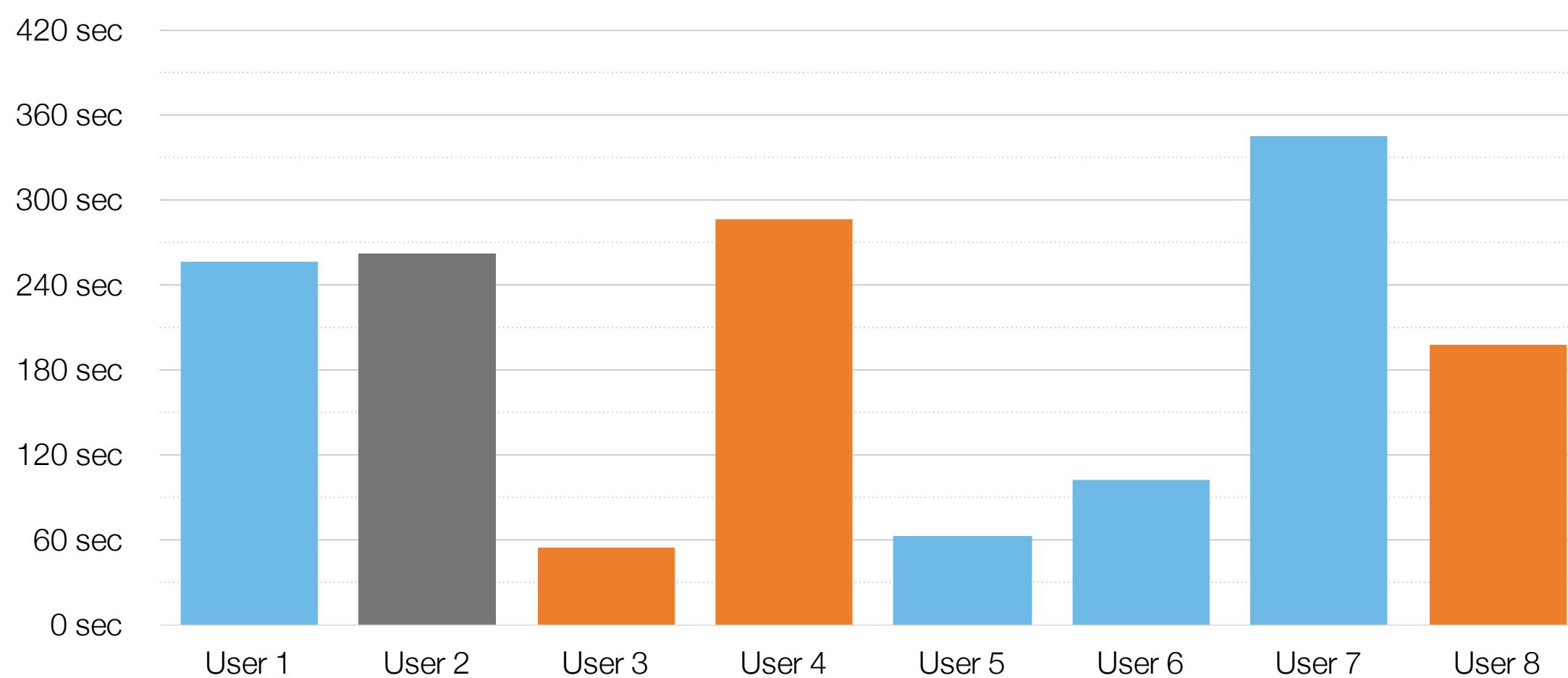
Success Minor Mistake Fail

*Determine the status of
your Canada Child
Benefit Application.*

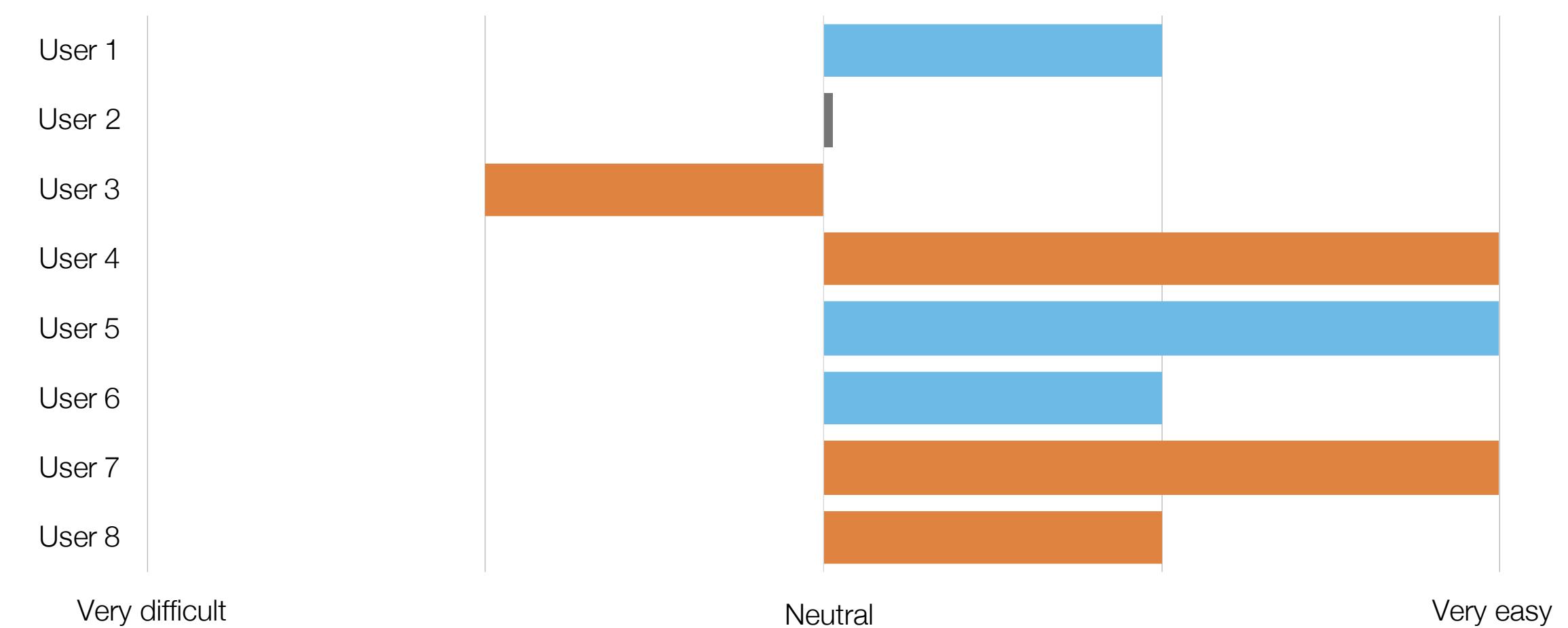
4/8

Users were
Successful

Time on task



Perceived ease of use



Task 2 - Status of Child Benefit Application comparison

User Test 1 User Test 2

Task completion

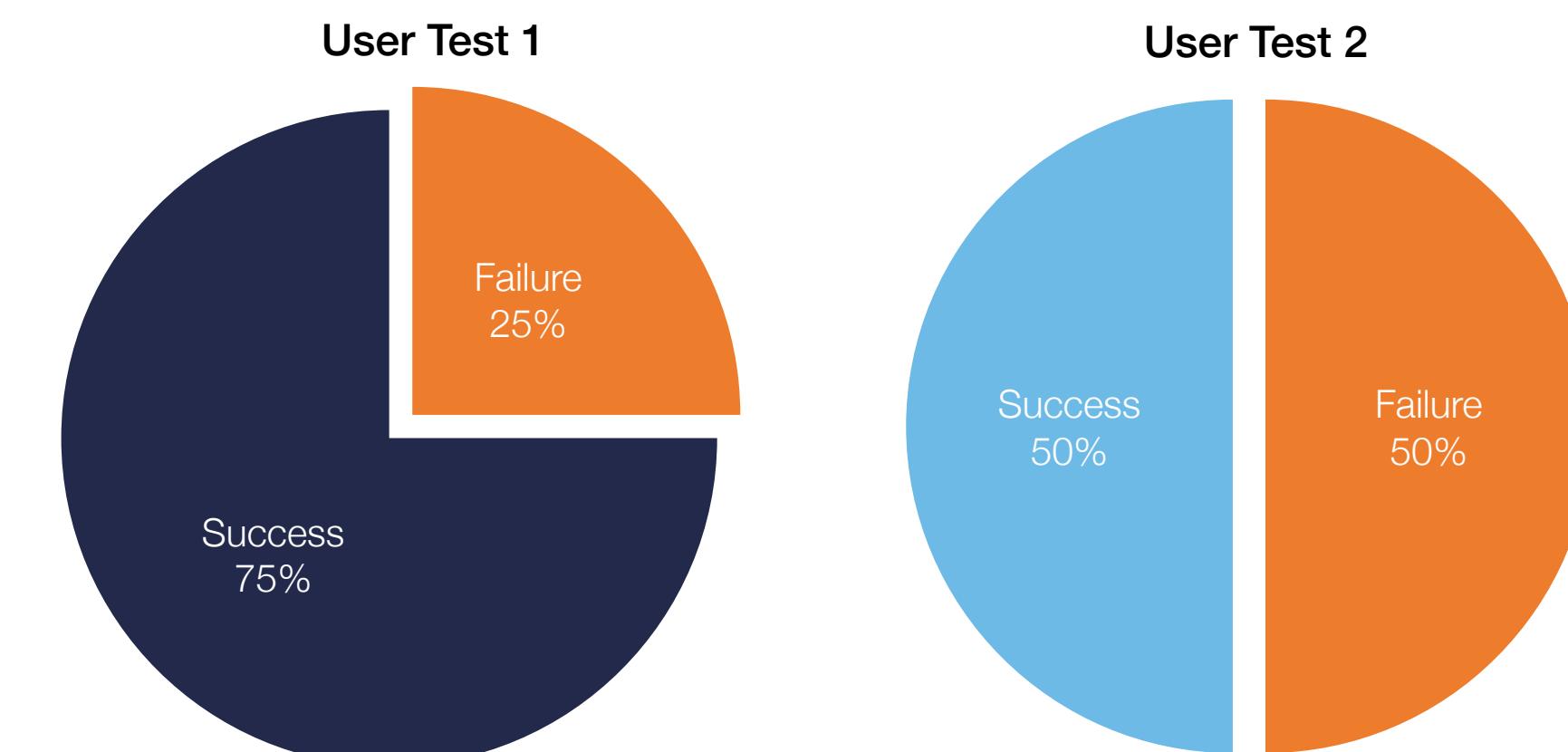
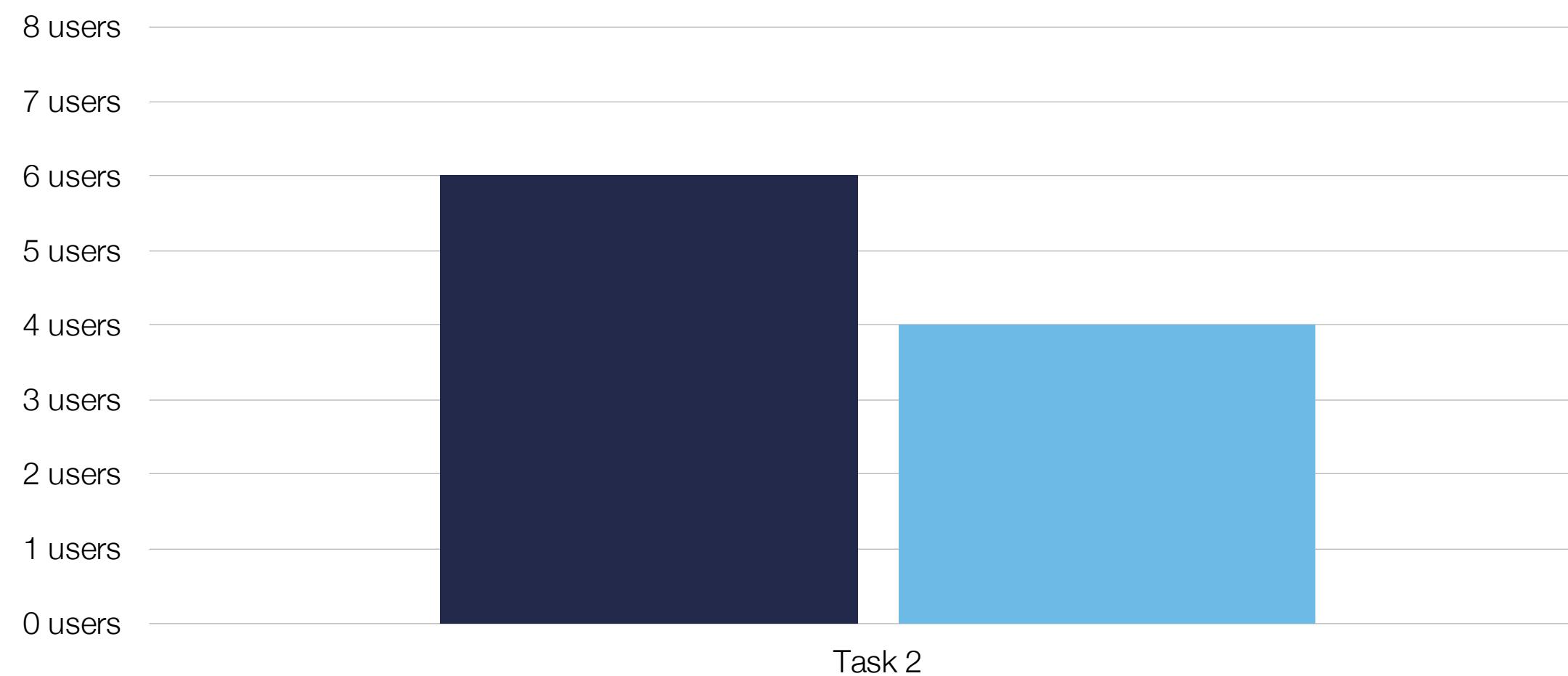
33% ↓

Decrease in
task completion

Average success rate

33% ↓

Decrease in
success rate



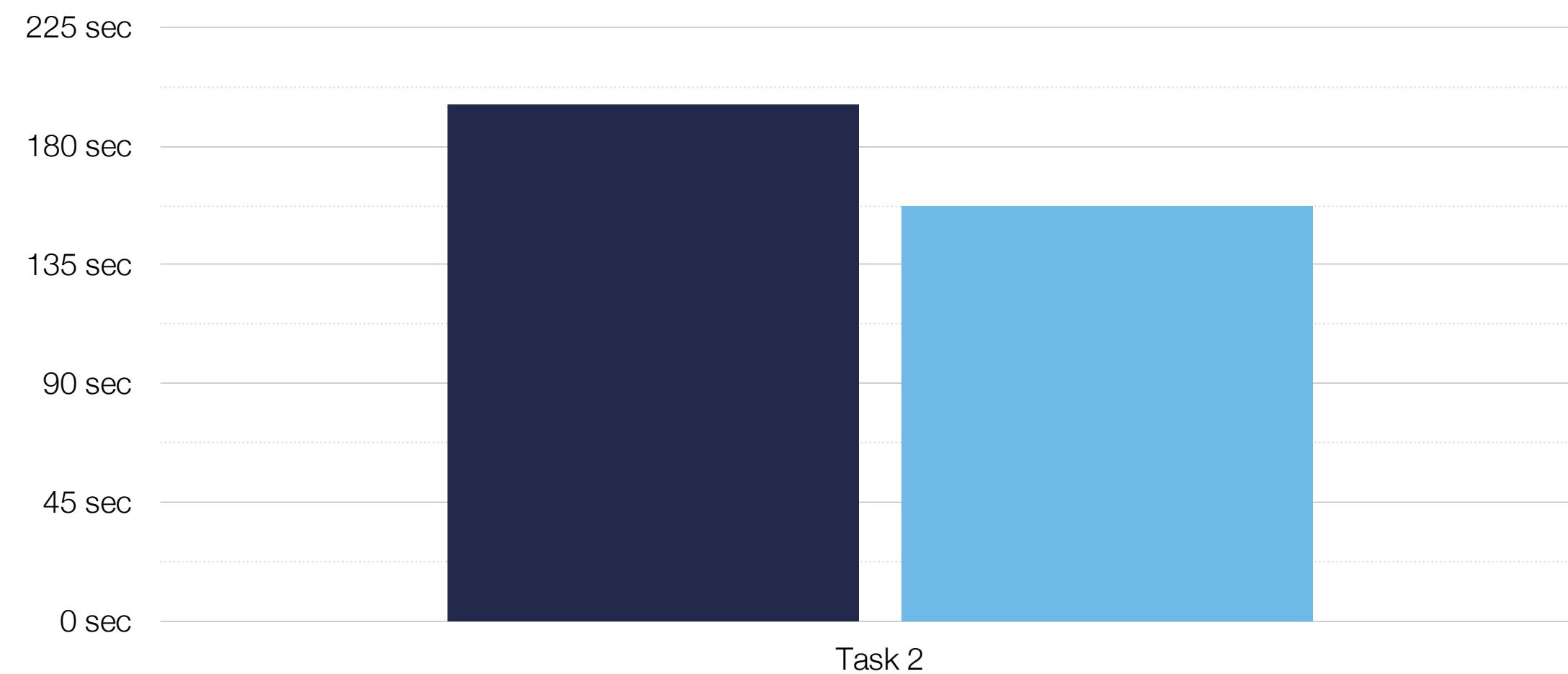
Task 2 - Status of Child Benefit Application comparison - cont.

■ Baseline Test ■ Retest

Average time on task

20%
↓

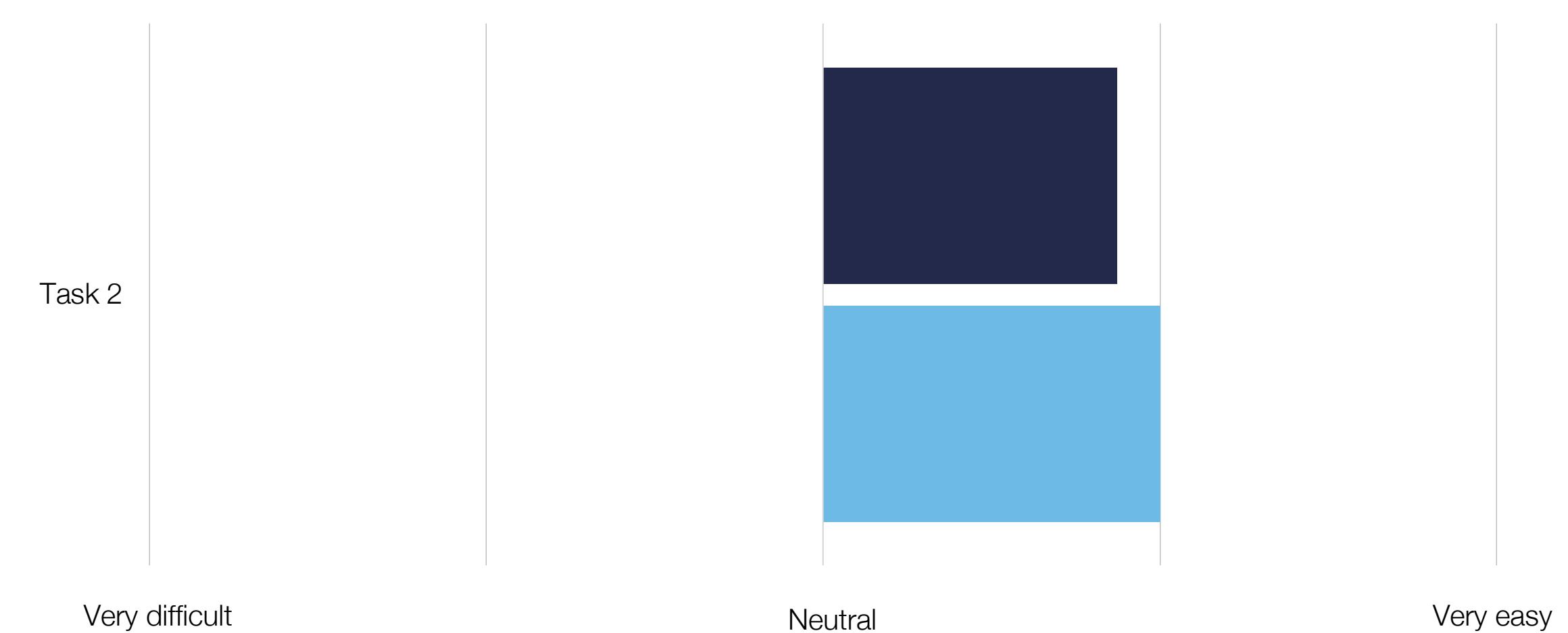
Decrease in
time on task



Average task usability

14%
↑

Increase in
ease of use



Task 2 - Status of Child Benefit Application - cont.

Observations

- ▶ Most of the users went directly under “Benefits and credits” (in the ribbon or on the left panel)
- ▶ One of the “major wrong” was associated with a user who inferred from the Benefits & Credits table on the Overview that the application and when the next payment would take place.
- ▶ The question implied two answers, how far along CRA is in processing (May 20th) and the current status (completed).
- ▶ We may suppose those information would have been included under the Benefits and Credits Notice. The second “major wrong” considered this letter having all information needed.

“I expected to see it under benefits & credits, but not difficult, I'm not use to seeing the progress tracker.”

“That is not where I would have gone. Maybe in 18 months down the road when I'll get use to seeing the PT”

Recommendations

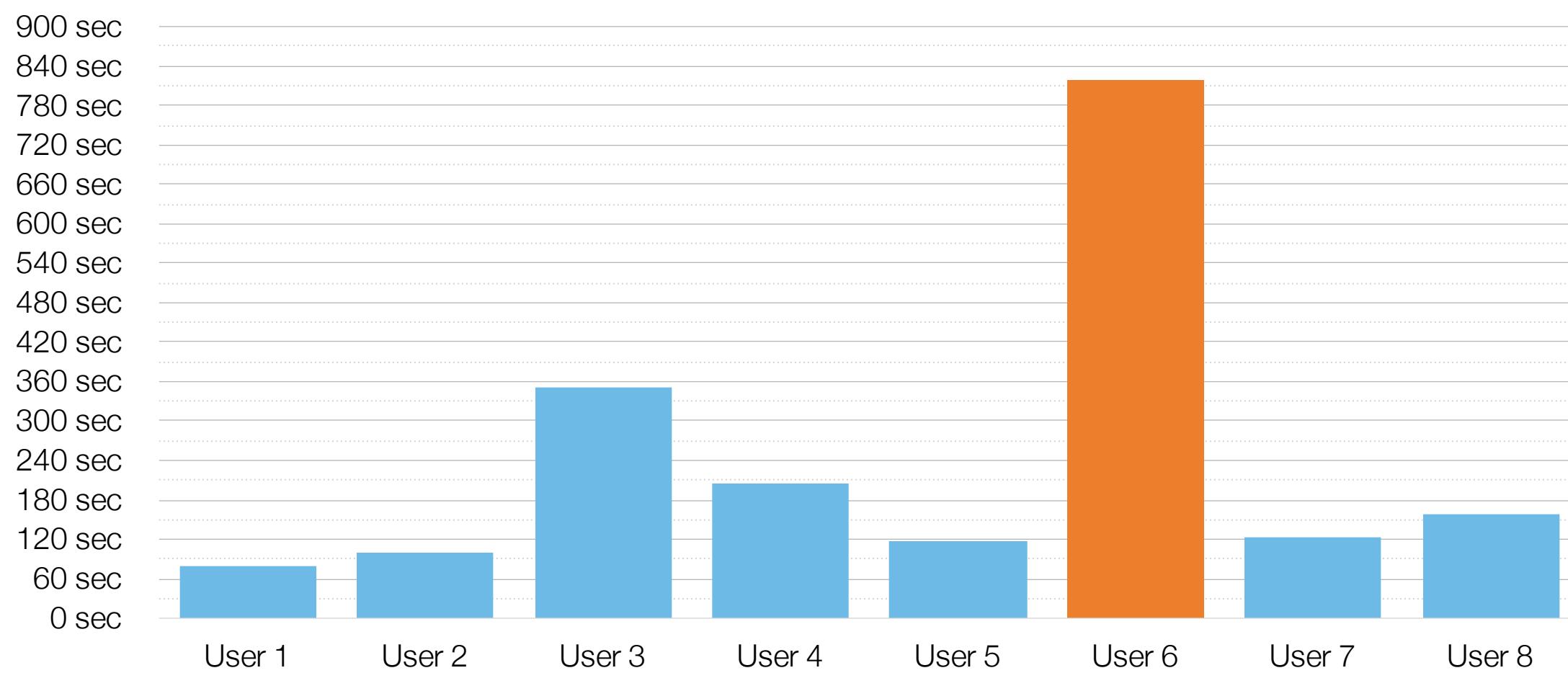
- ▶ If the PT is to be a separate area of the page (see the Section High-Level Issues), then it should be accessible from those areas.
- ▶ Users could find the answer in the table but one user would have expected to see for which kid the benefit was paid.

Task 3 - Additional review required

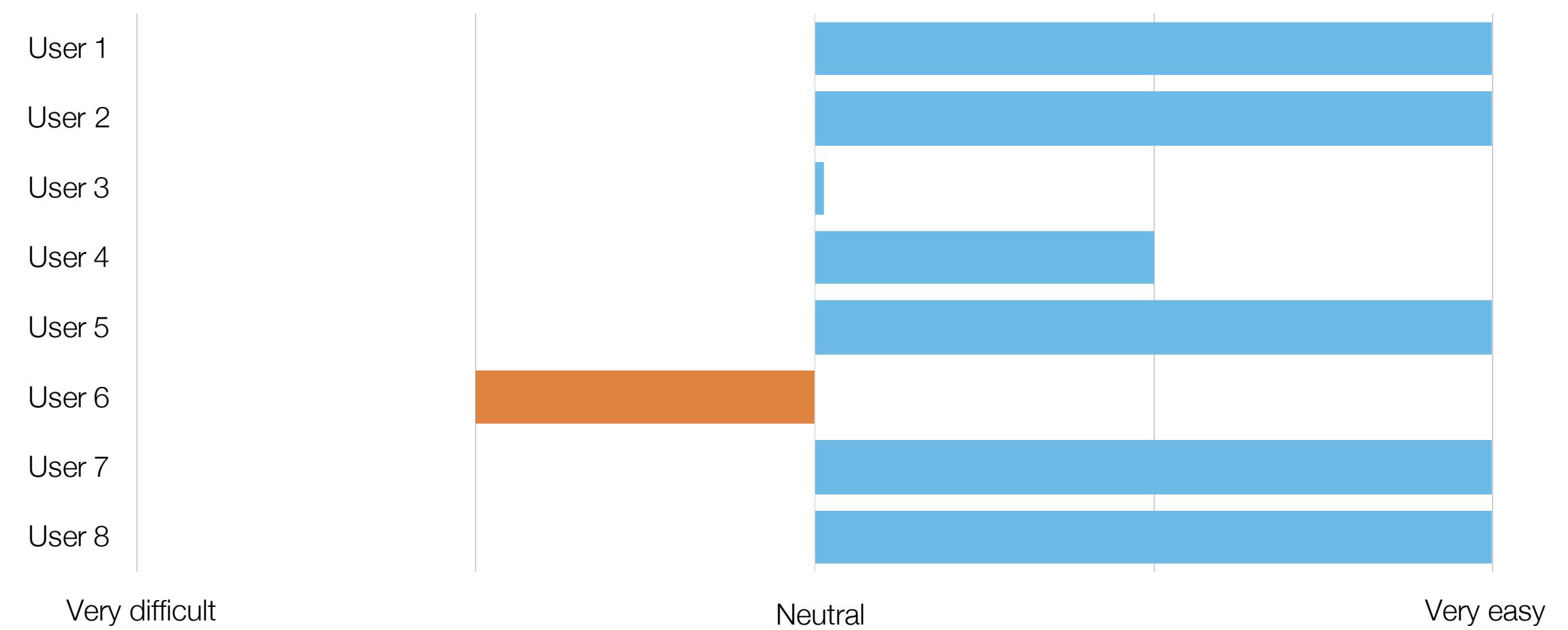
■ Success ■ Minor Mistake ■ Fail

*Find out the next step in
processing your 2019 T1
tax return.*

Time on task



Perceived ease of use



7/8

Users were
Successful

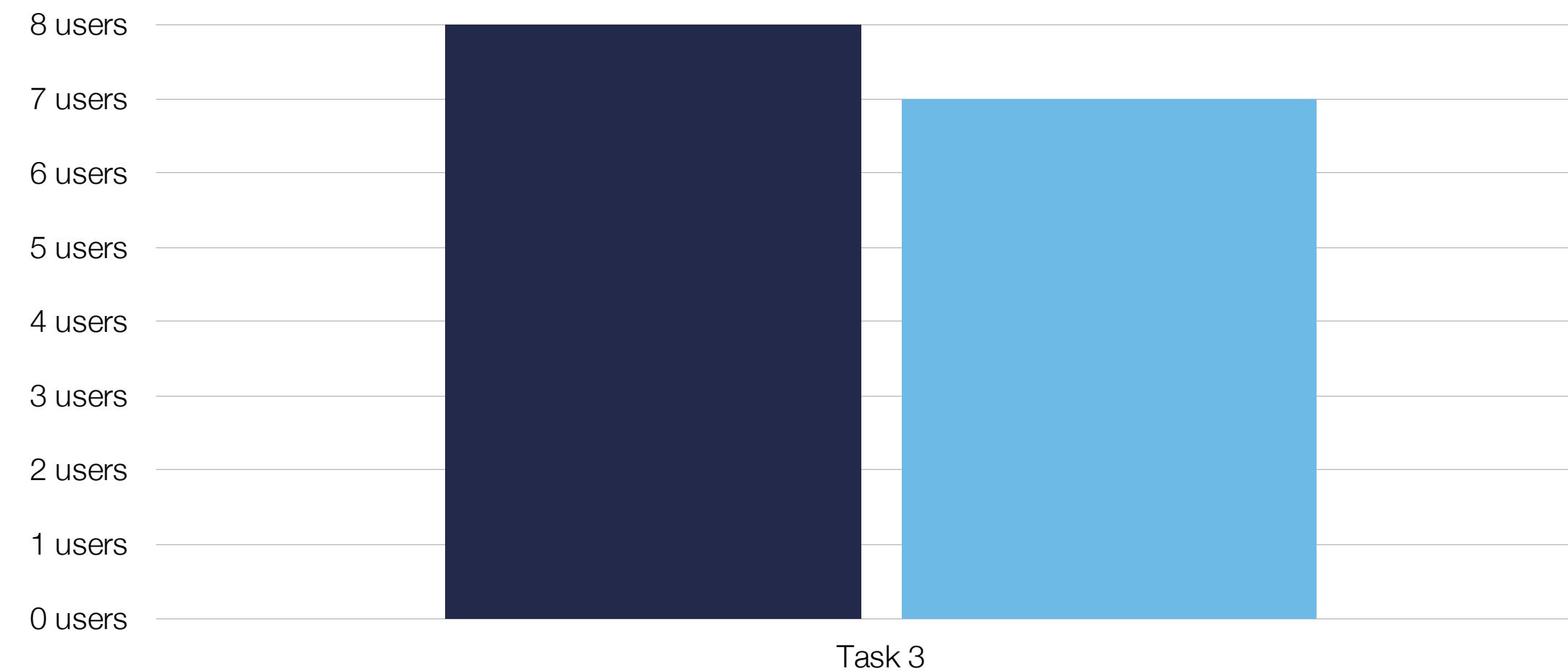
Task 3 - Additional review required comparison

User Test 1 User Test 2

Task completion

13% ↓

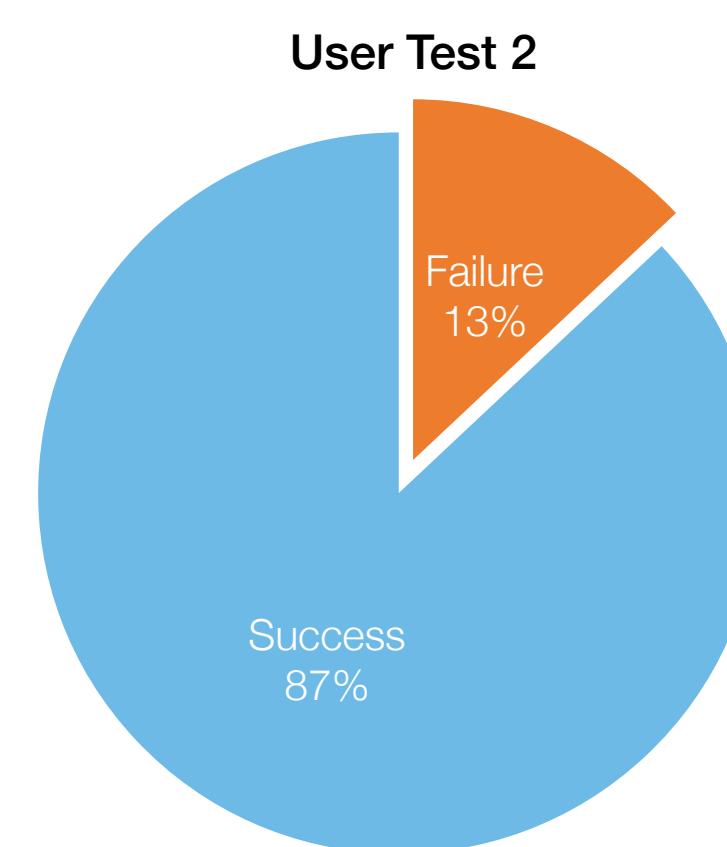
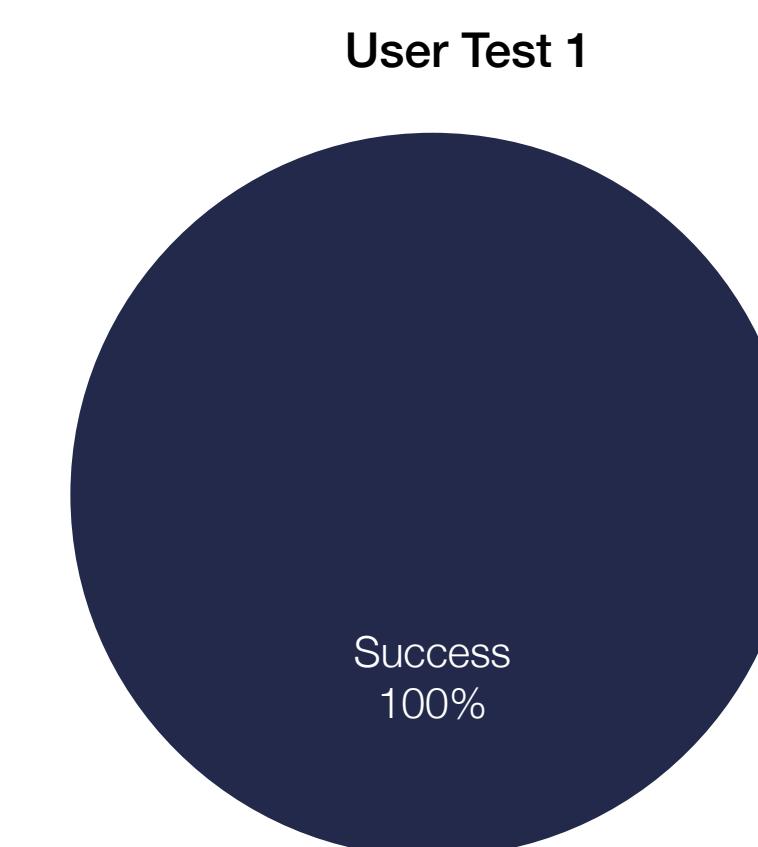
Decrease in
task completion



Average success rate

13% ↓

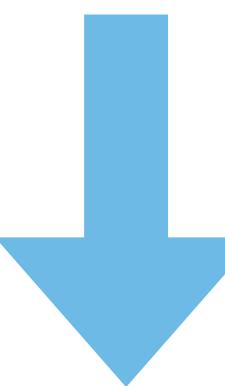
Decrease in
success rate



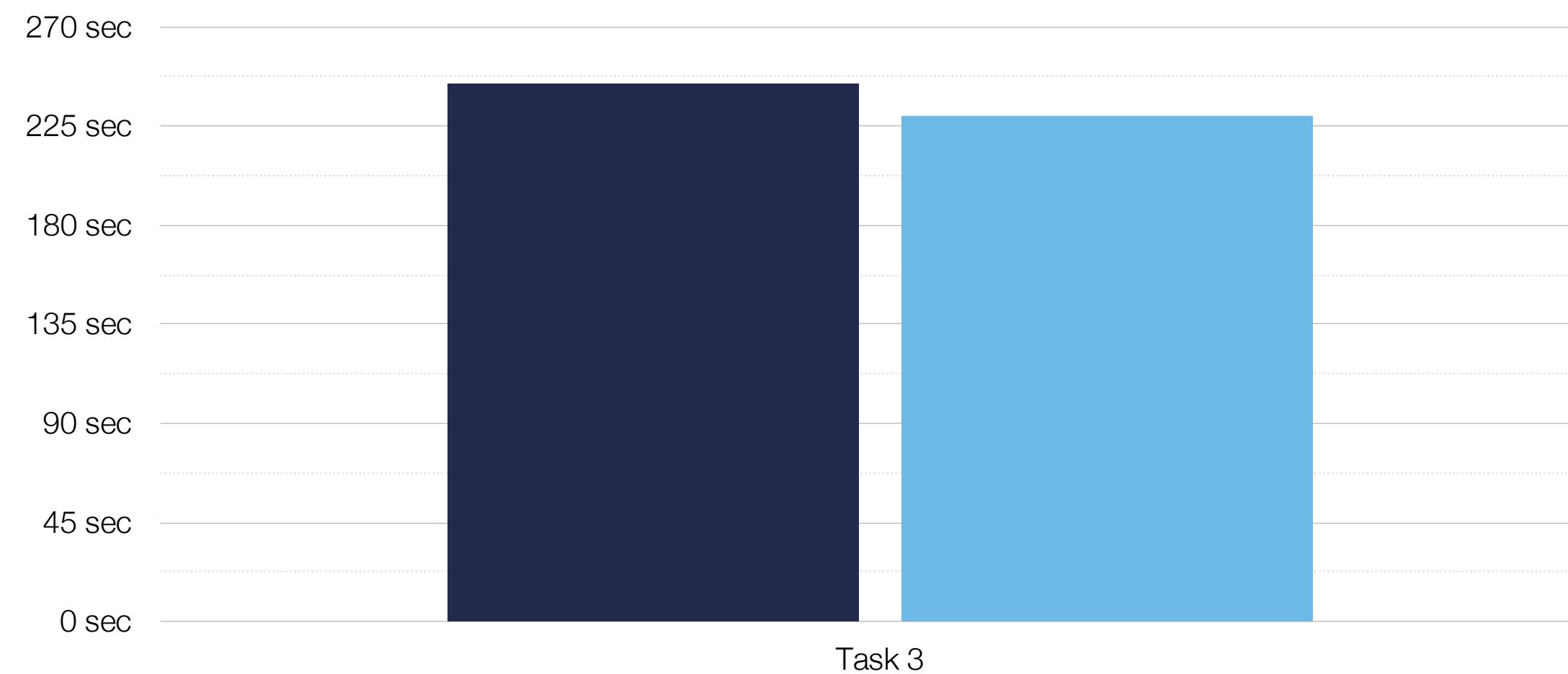
Task 3 - Additional review required comparison - cont.

■ Baseline Test ■ Retest

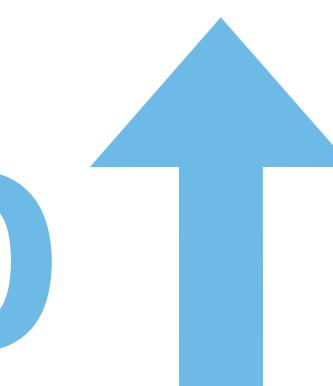
Average time on task

6% 

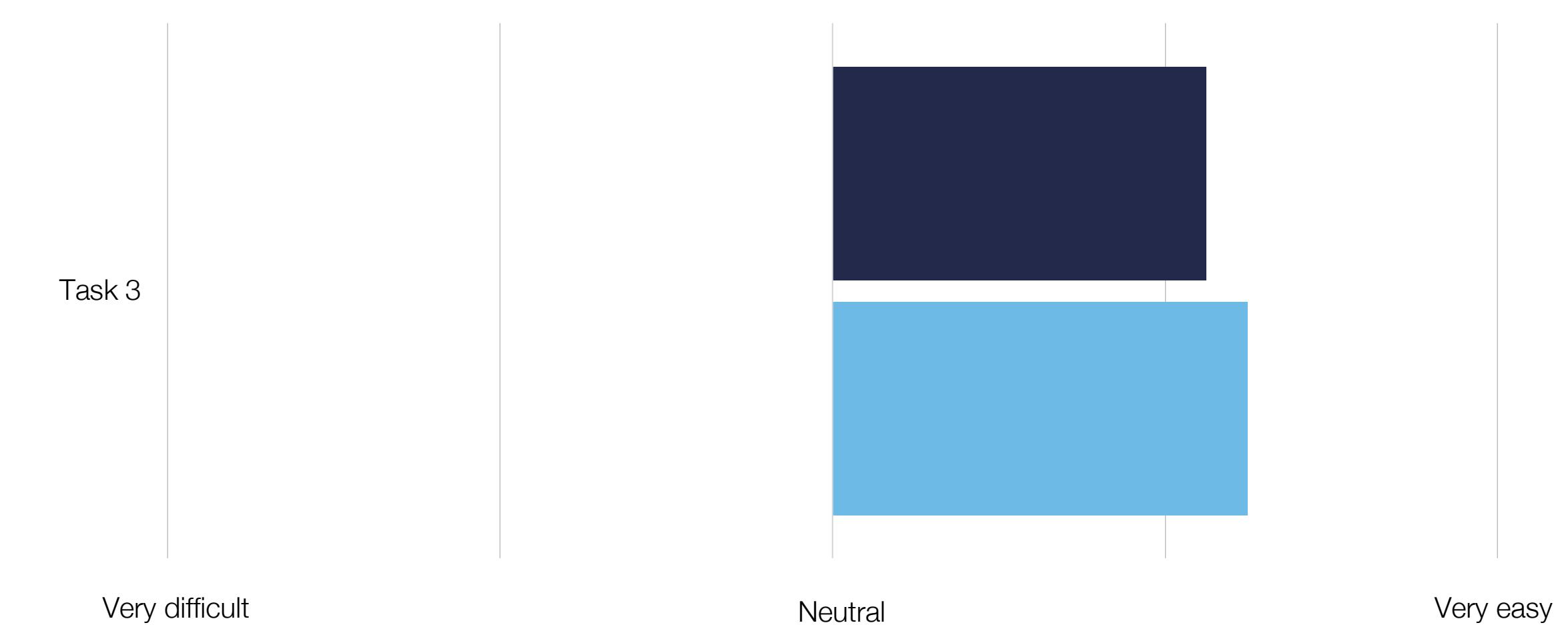
Decrease in
time on task



Average task usability

11% 

Increase in
ease of use



Task 3 - Additional review required comparison - cont.

Observations

“I’m confused. I don’t understand what Additional review means.”

“I’ll go to this amazing box Progress Tracker where it says...., the big exclamation mark, says that they need something else.”

“It’s a very generic title, maybe something more specific, what they are looking for “.

“This will explain, but there is no letter.”

Recommendations

- ▶ Even if most participants found the information, it would be more effective to give them access to a proper letter with a content that makes sense for them and not something too generic.

Task 4 - Complete list of ongoing files

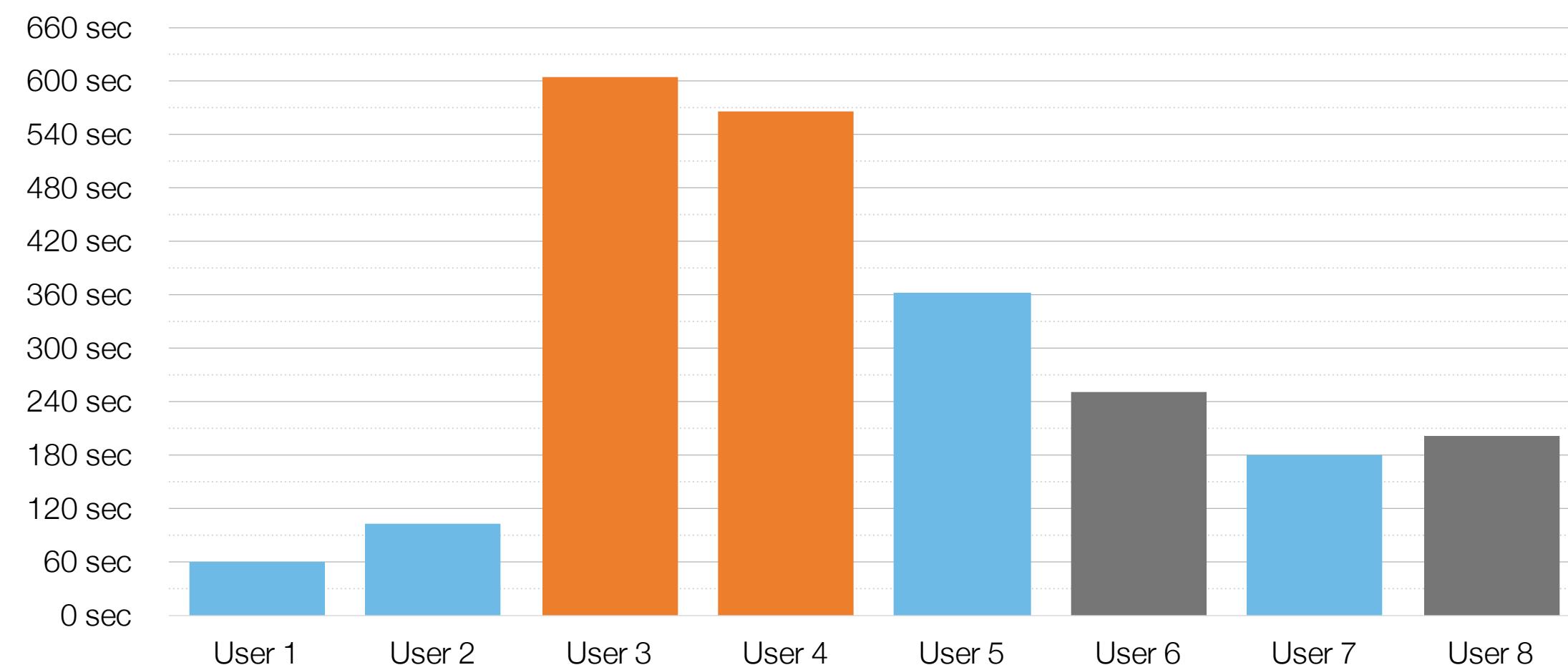
Success Minor Mistake Fail

*Find information about
how far along the CRA is
in processing your
submissions.*

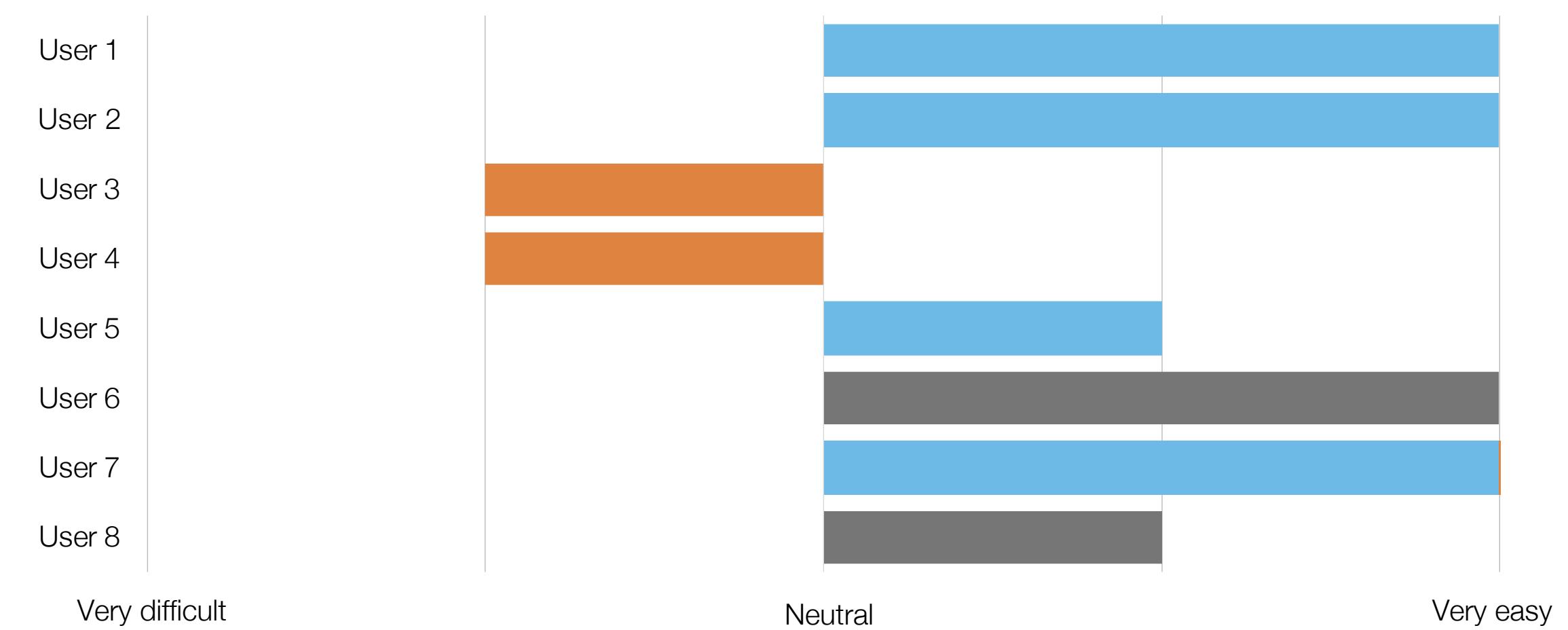
4/8

Users were
Successful

Time on task



Perceived ease of use



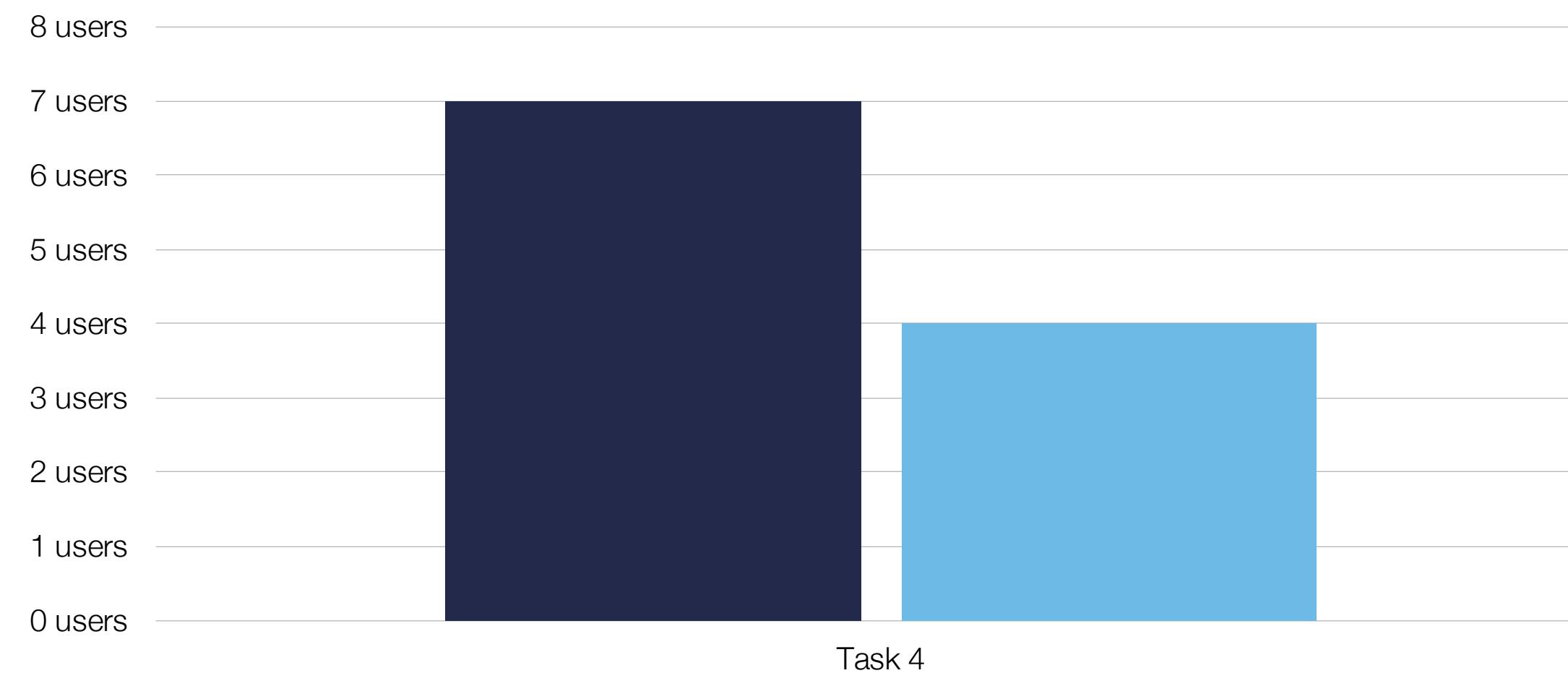
Task 4 - Complete list of ongoing files comparison

User Test 1 User Test 2

Task completion

42%
↓

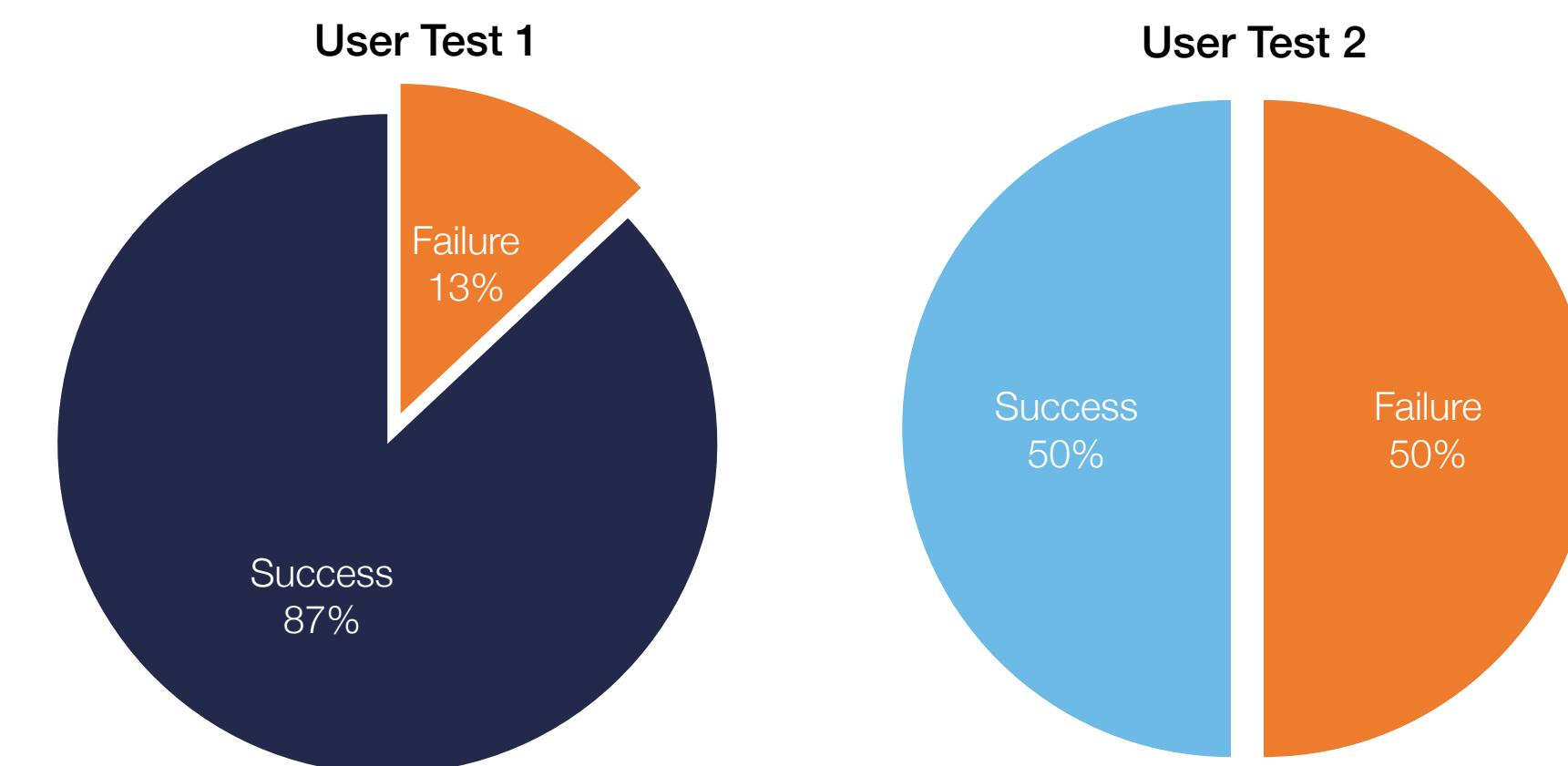
Decrease in
task completion



Average success rate

42%
↓

Decrease in
success rate



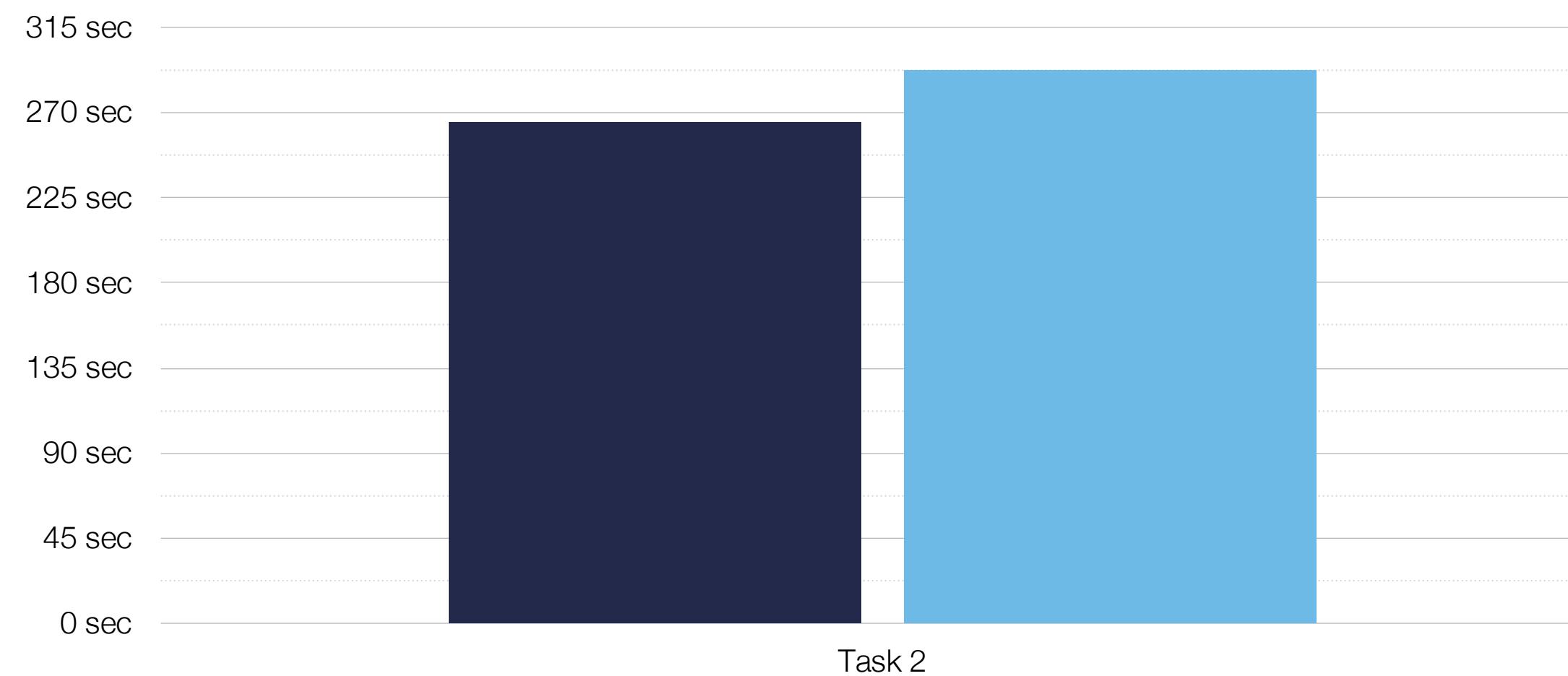
Task 4 - Complete list of ongoing files comparison - cont.

■ Baseline Test ■ Retest

Average time on task

10%
↑

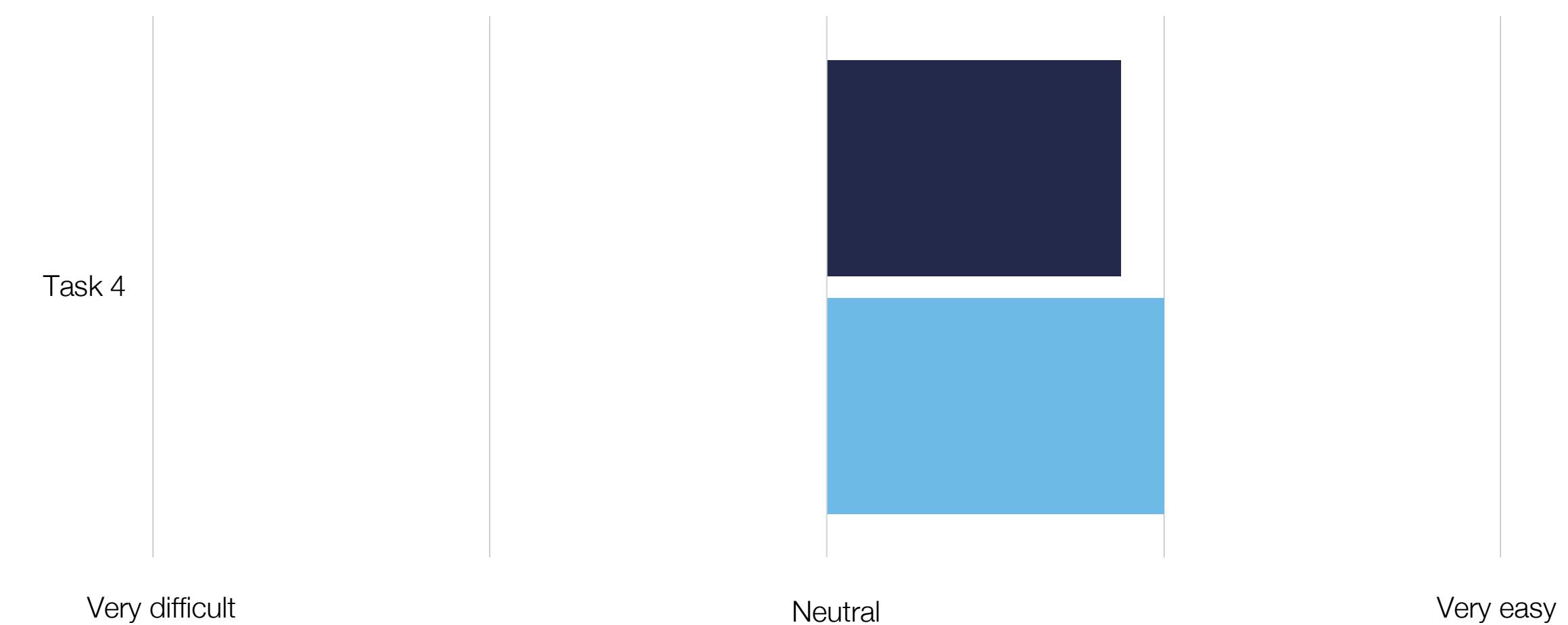
Increase in
time on task



Average task usability

20%
↓

Decrease in
ease of use



Task 4 - Complete list of ongoing files - cont.

Observations

- ▶ The instructions are not clear for the participants; this may be because the task is not all that common for most users. Further, the question provides the users with a keyword that they can use right away.
- ▶ When participants landed on this page, they were attracted by the status adjustment denied, but they all needed to read all of the PT content to find the relevant information.

“I don't know which items they are referring to [...] I don't even know how many is All.”

“A table format, click on the link into the table. You could see all 6 in 1, rather than having lines for each file.”

“This is the 3rd question where my response would be go to the progress tracker, I wonder if they are testing how the PT is working.”

Recommendations

- ▶ Avoid any terms that would lead to a specific word, and create a confusion into the task. Rather than mentioning T1 adjustments, or so, just write: Where would you find the status of all of your current or recent interactions with the CRA?

Task 5 - 2018 Tax Return Details

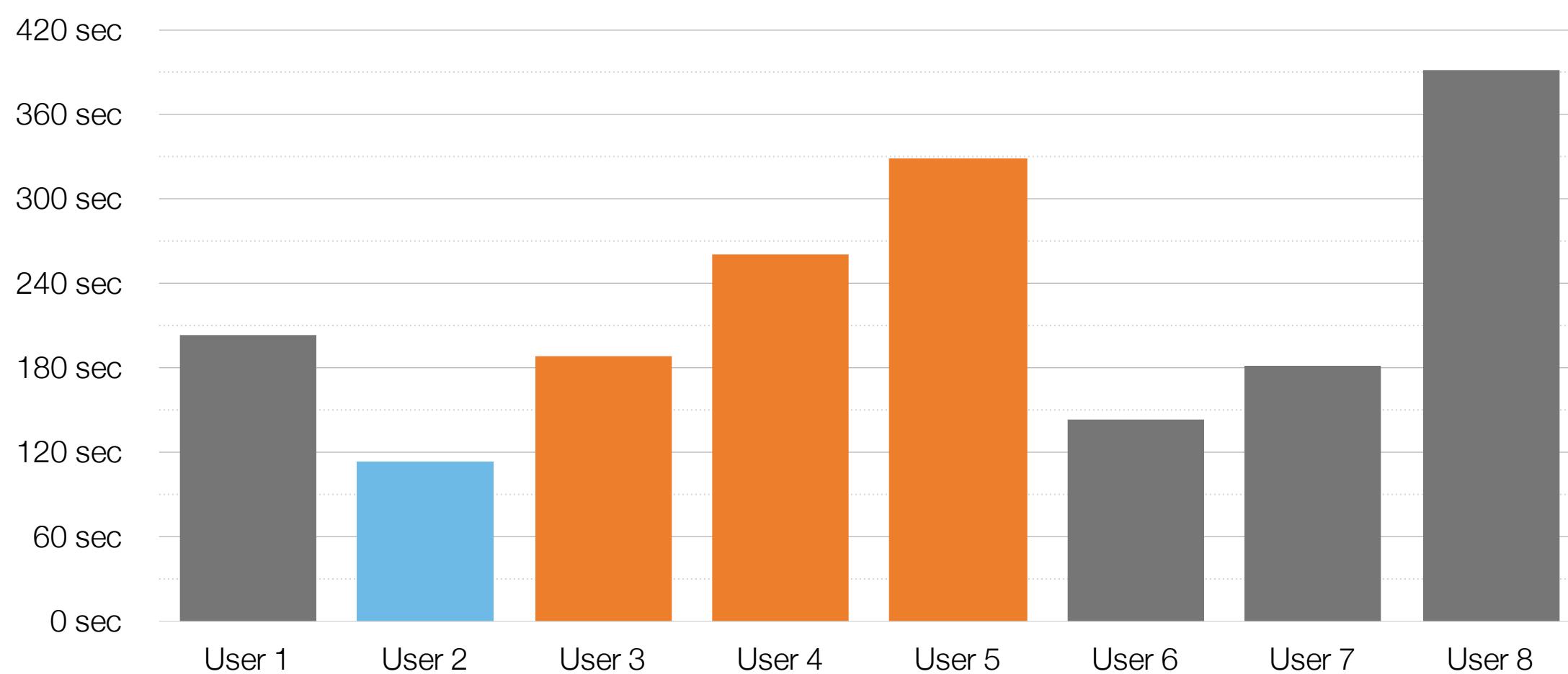
■ Success ■ Minor Mistake ■ Fail

*See all the steps that
were taken to complete
a previous tax return.*

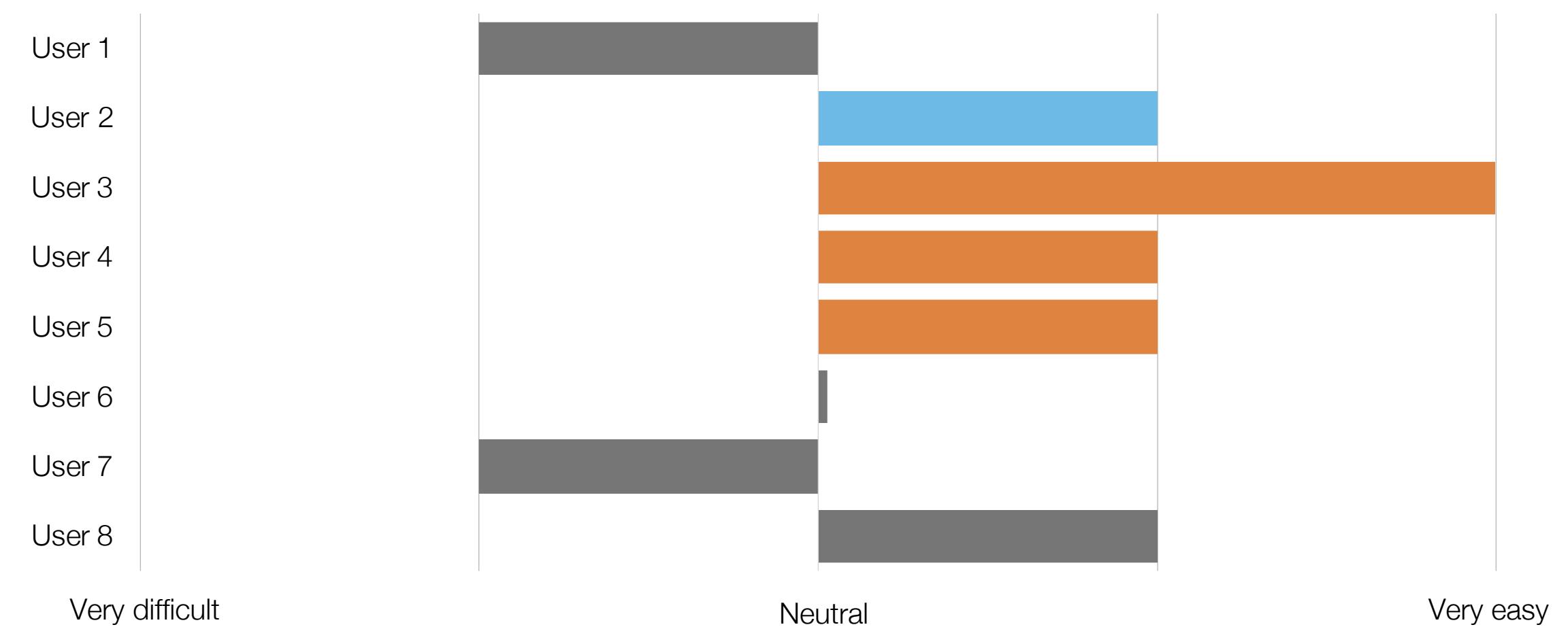
1 / 8

Users were
Successful

Time on task



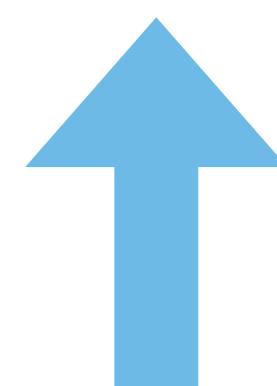
Perceived ease of use



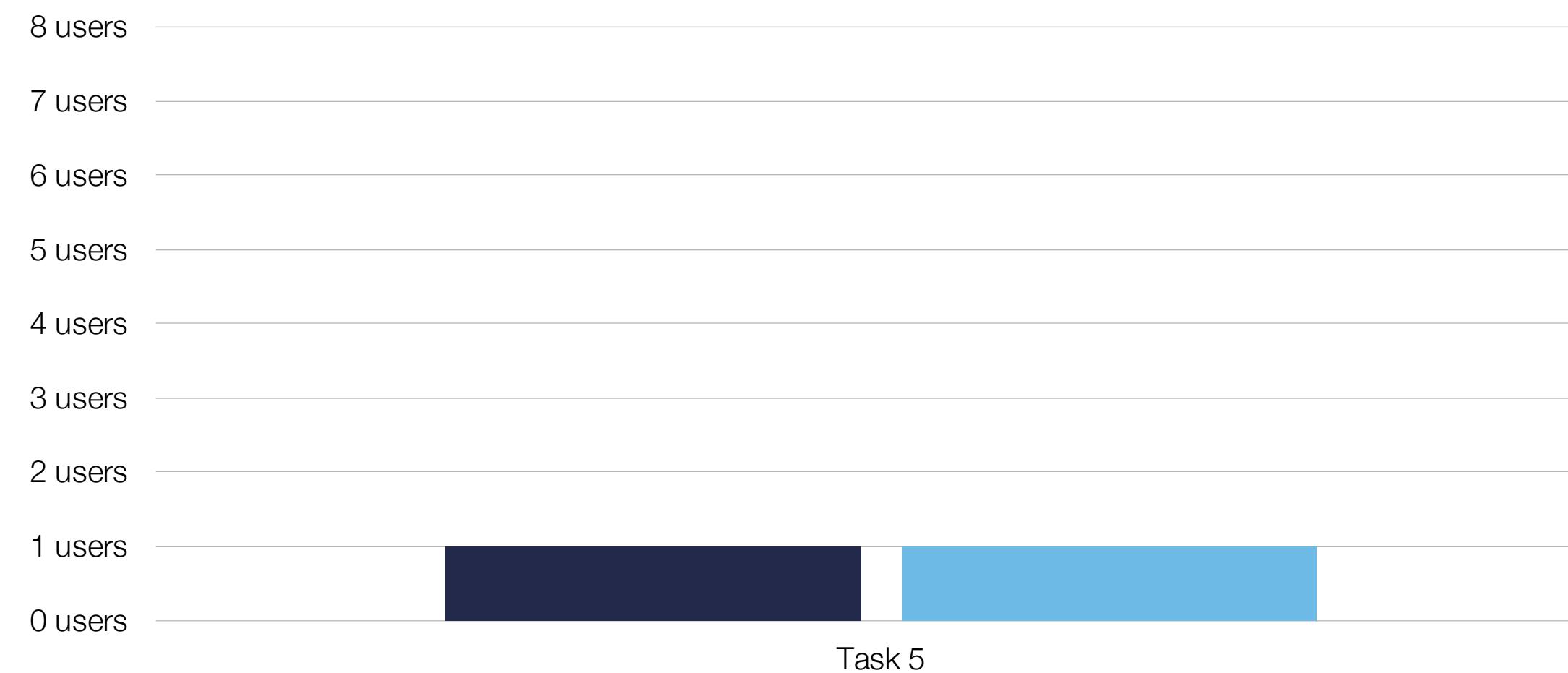
Task 5 - 2018 Tax Return Details comparison

User Test 1 User Test 2

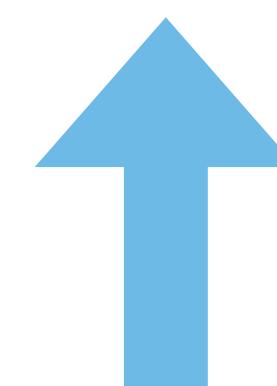
Task completion

0%

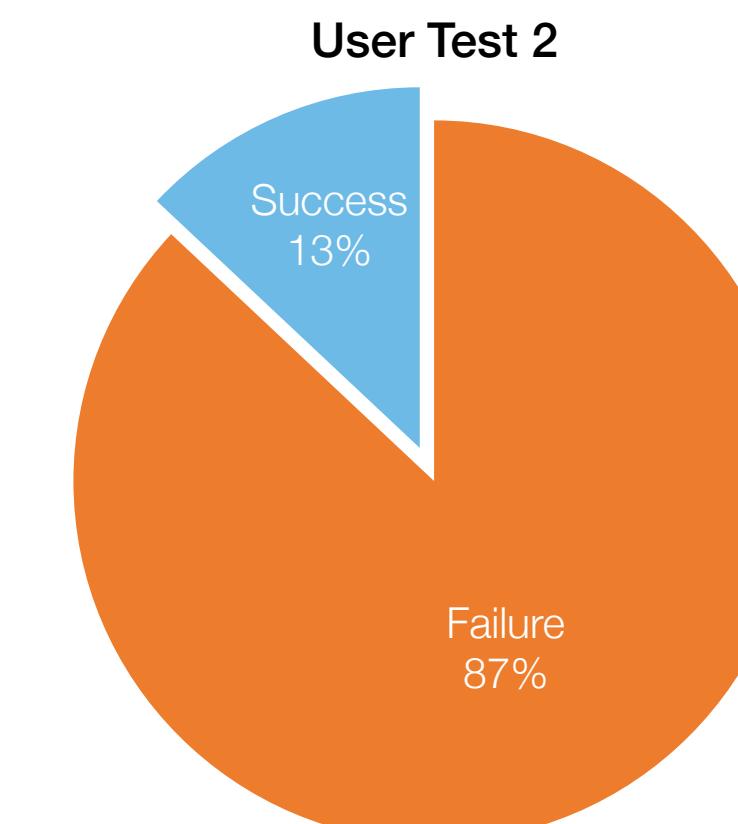
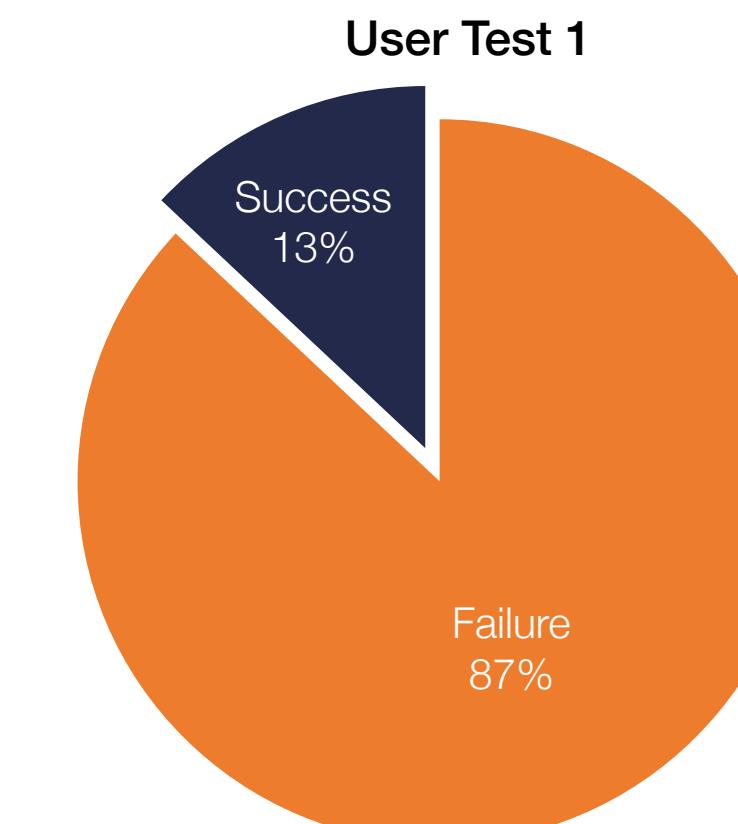
Increase in
task completion



Average success rate

0%

Increase in
success rate



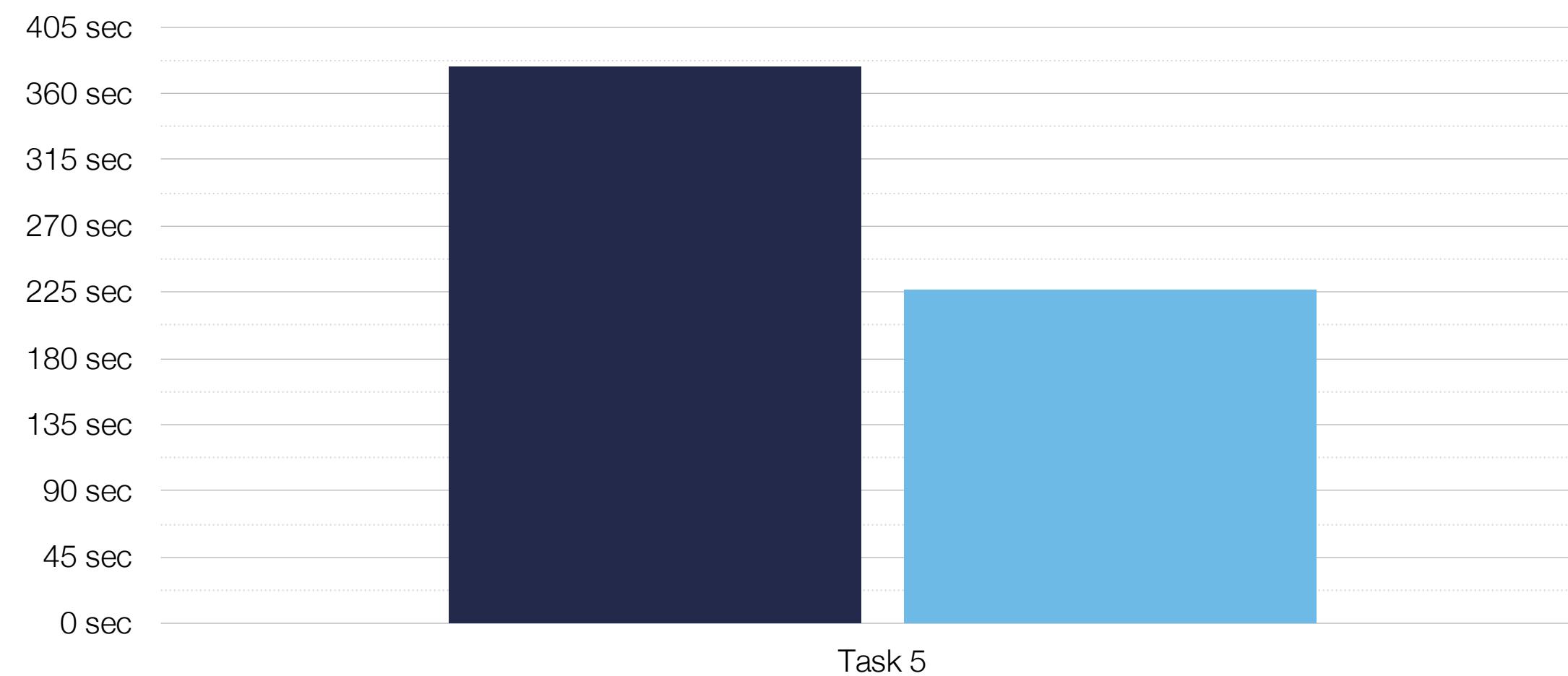
Task 5 - 2018 Tax Return Details comparison - cont.

■ Baseline Test ■ Retest

Average time on task

67%
↓

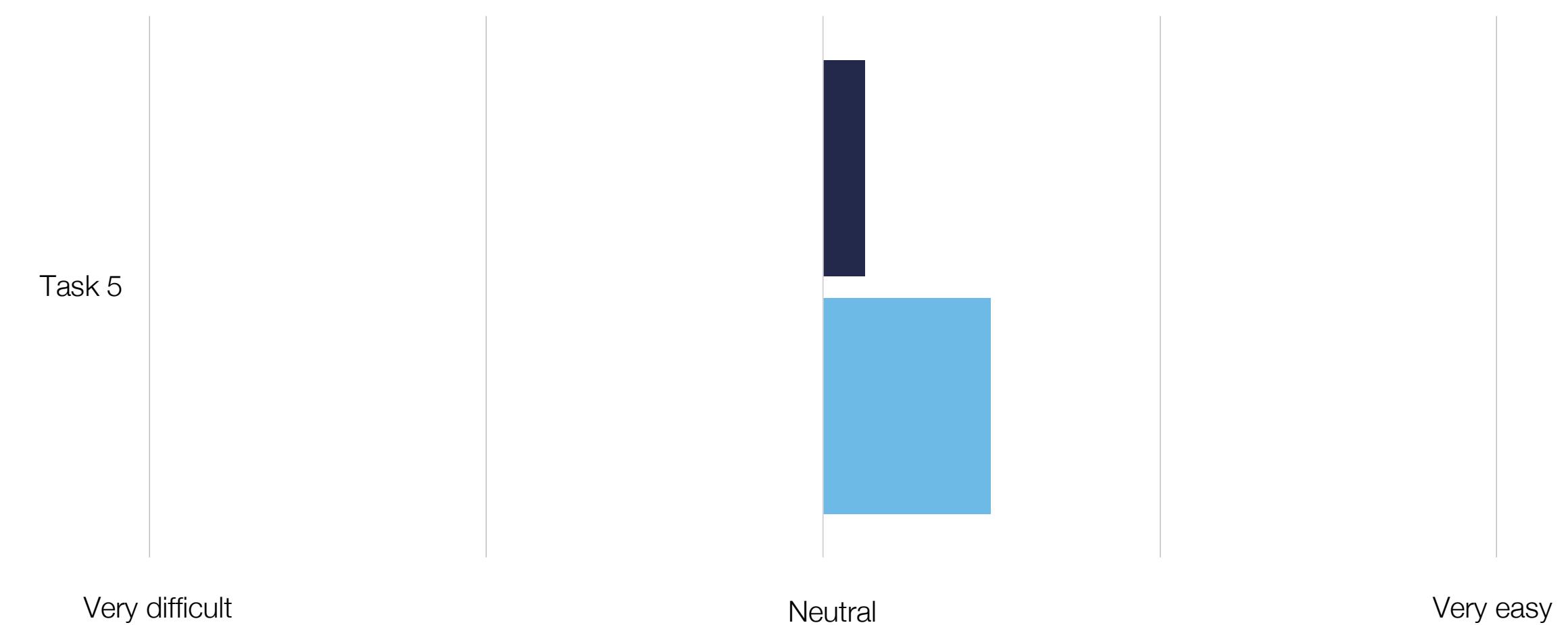
Decrease in
time on task



Average task usability

300%
↑

Increase in
ease of use



Task 5 - 2018 Tax Return Details - cont.

Observations

- ▶ Generally the participants did not see the link “View previous statuses.” The PT gathers all the steps in each file for 30 days.
- ▶ As was done in the first round, the moderator rephrased the task to help the users understand what was required.
- ▶ Most of the participants went to the notice of assessment and to the 2018 online mail in order to see the details of the documentation required.
- ▶ The major failure on that task seems to be that the instructions for the task, combined with the “Completed” status for the item, induces the users to believe that there is no information about previous steps. This may also be related to the likelihood that users would carry such a task for a transaction that occurred in the previous 30 days.

“I'm going to assume that because it says completed that there is no supporting documentation that was required.”

Recommendations

- ▶ On the detail pages, open all the previous steps panels, with the last state clearly identified, this way will allow the user to refer to the previous steps spontaneously rather than digging for having this info.
- ▶ A) re-assess the credibility of this task, and B) if the task is kept, rephrase the instructions in order to allow clarity, ex: in 2018 you had been asked for supporting documents, where would you find the information concerning this request.

Task 6 - Subscription to email notifications

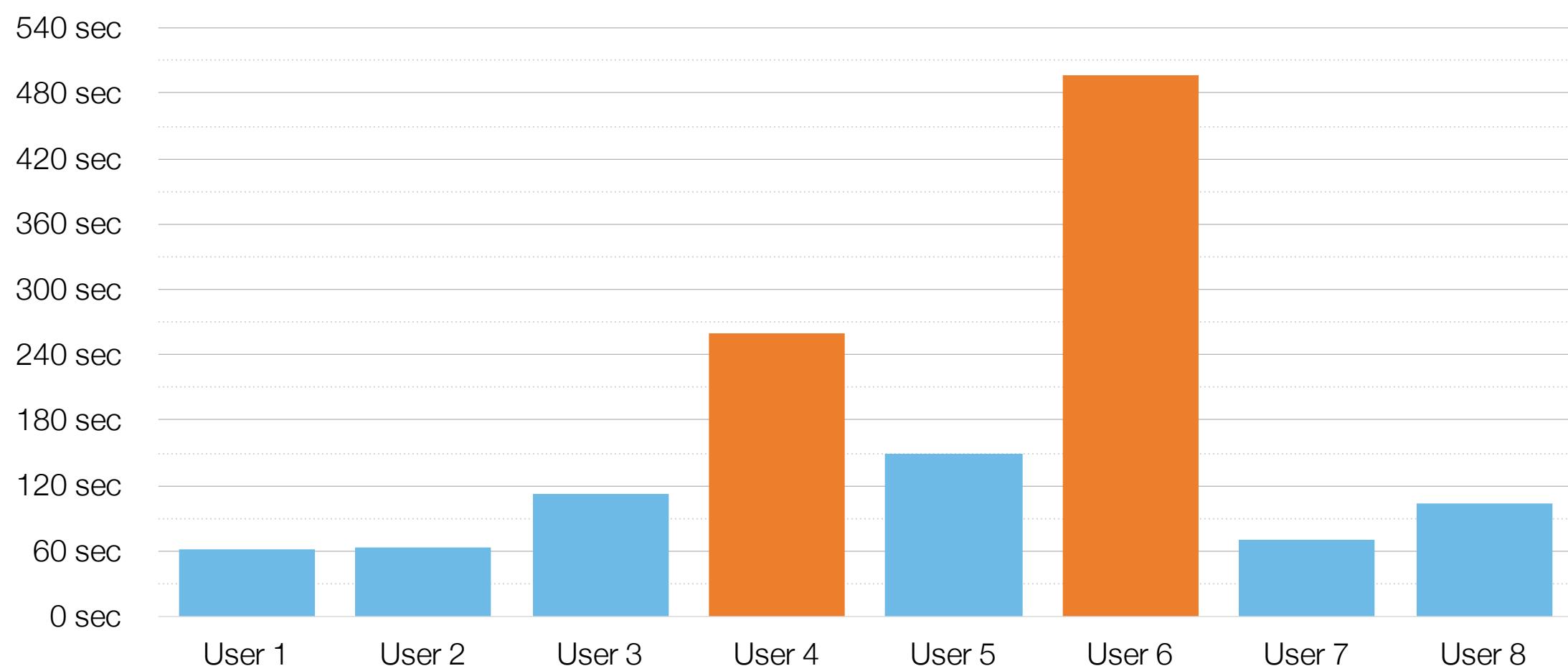
■ Success ■ Minor Mistake ■ Fail

*Find out where to
subscribe to email
notifications.*

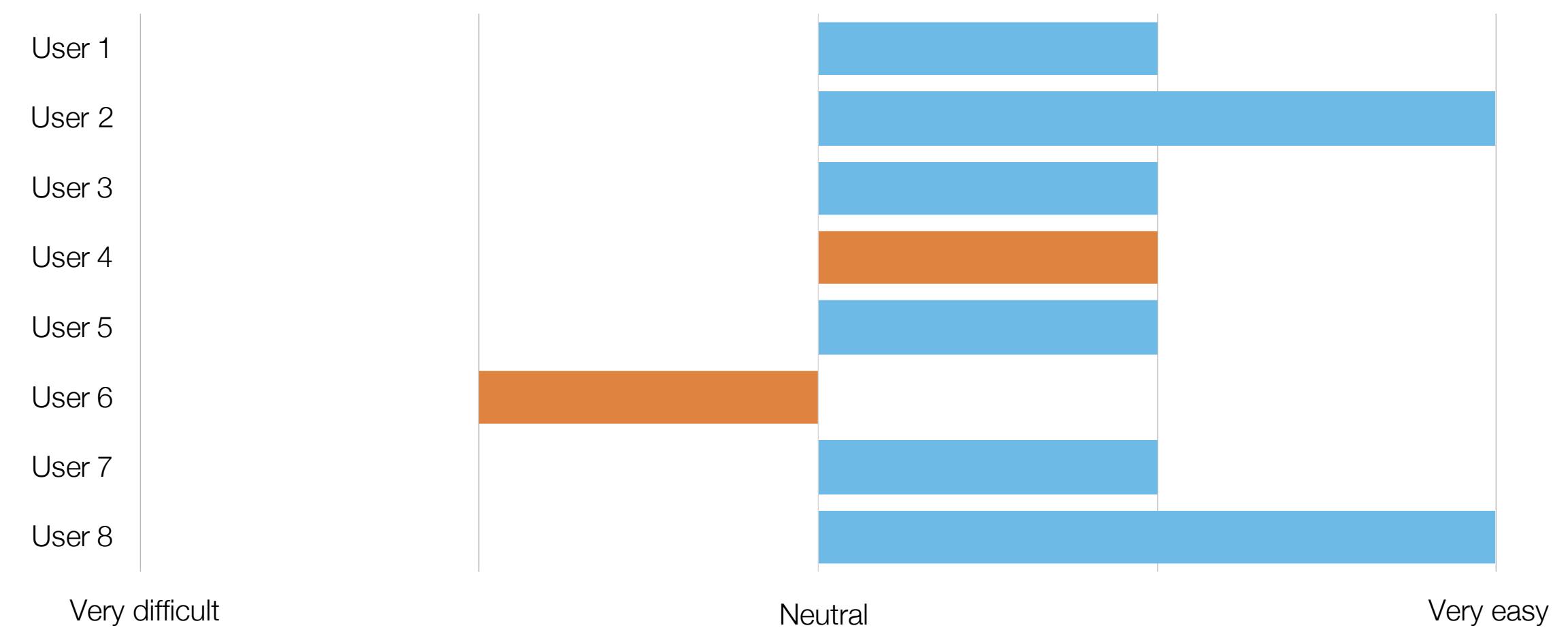
6/8

Users were
Successful

Time on task



Perceived ease of use



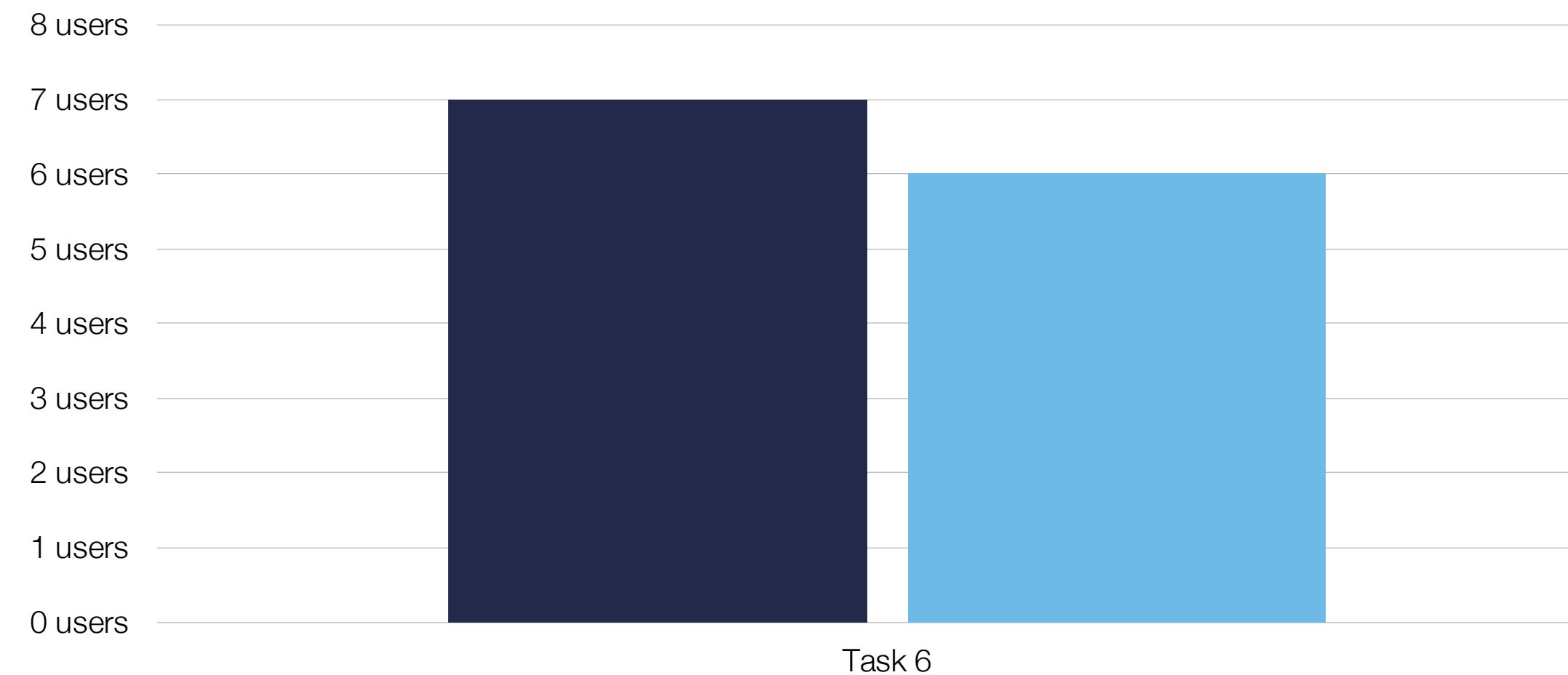
Task 6 - Subscription to email notifications comparison

User Test 1 User Test 2

Task completion

14% ↓

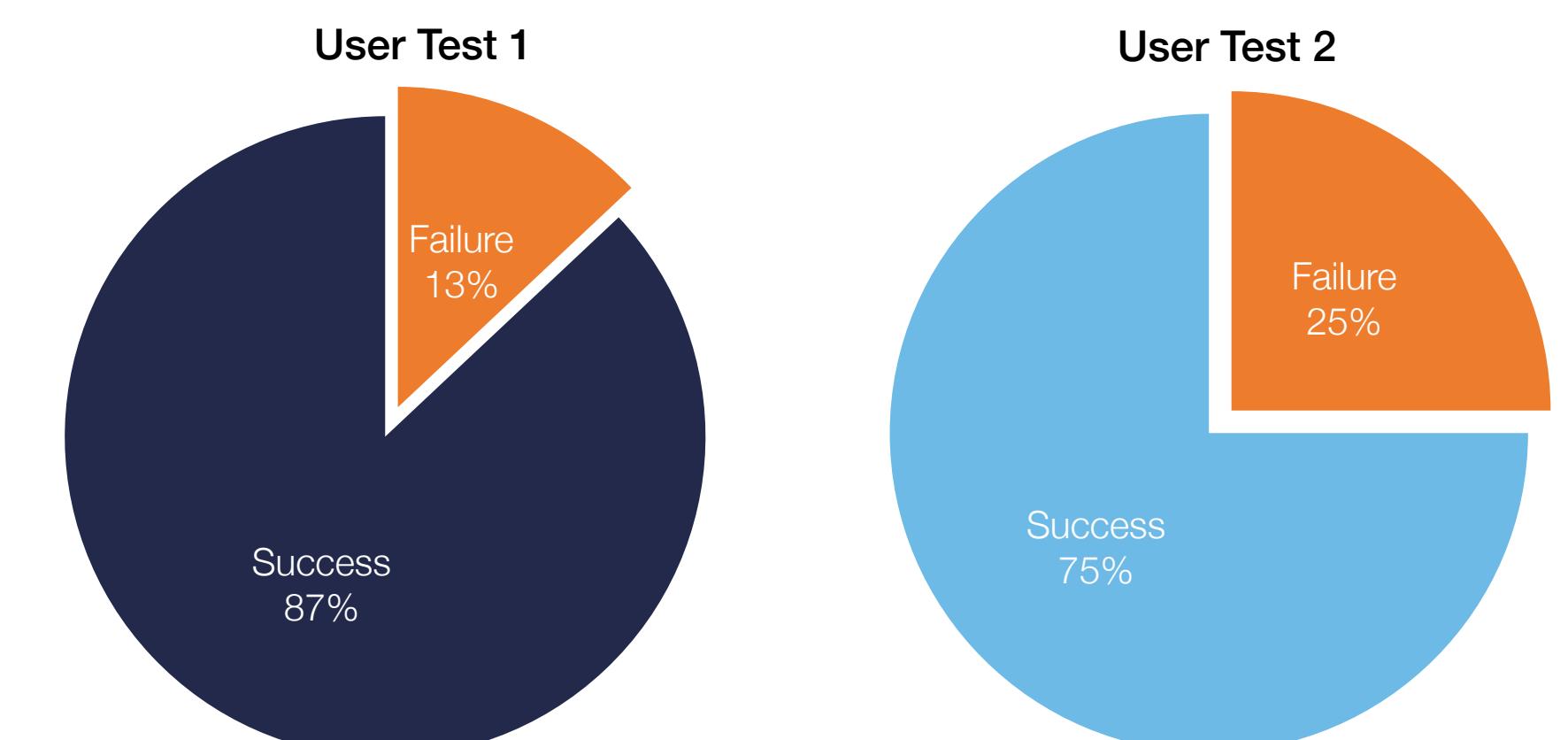
Decrease in
task completion



Average success rate

14% ↓

Decrease in
success rate



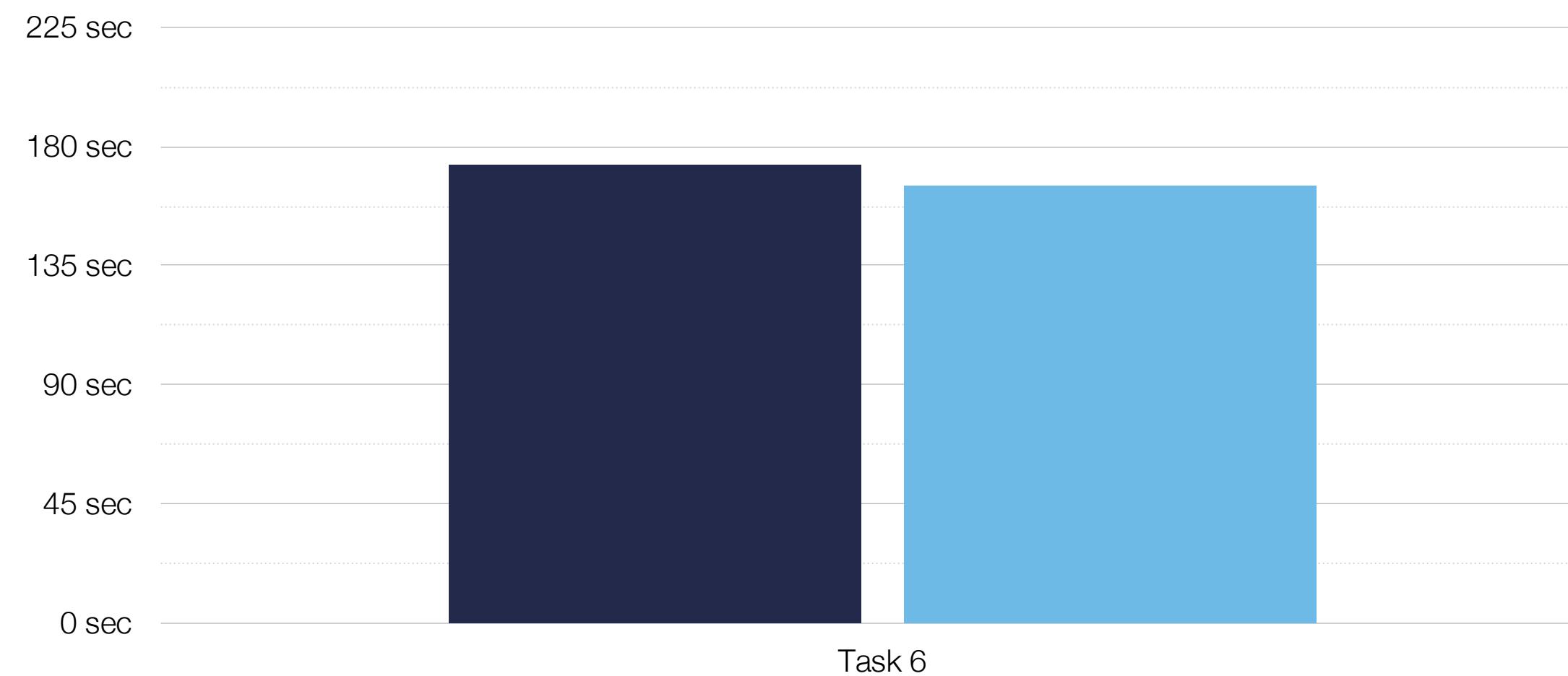
Task 6 - Subscription to email notifications - cont.

■ Baseline Test ■ Retest

Average time on task

5% ↓

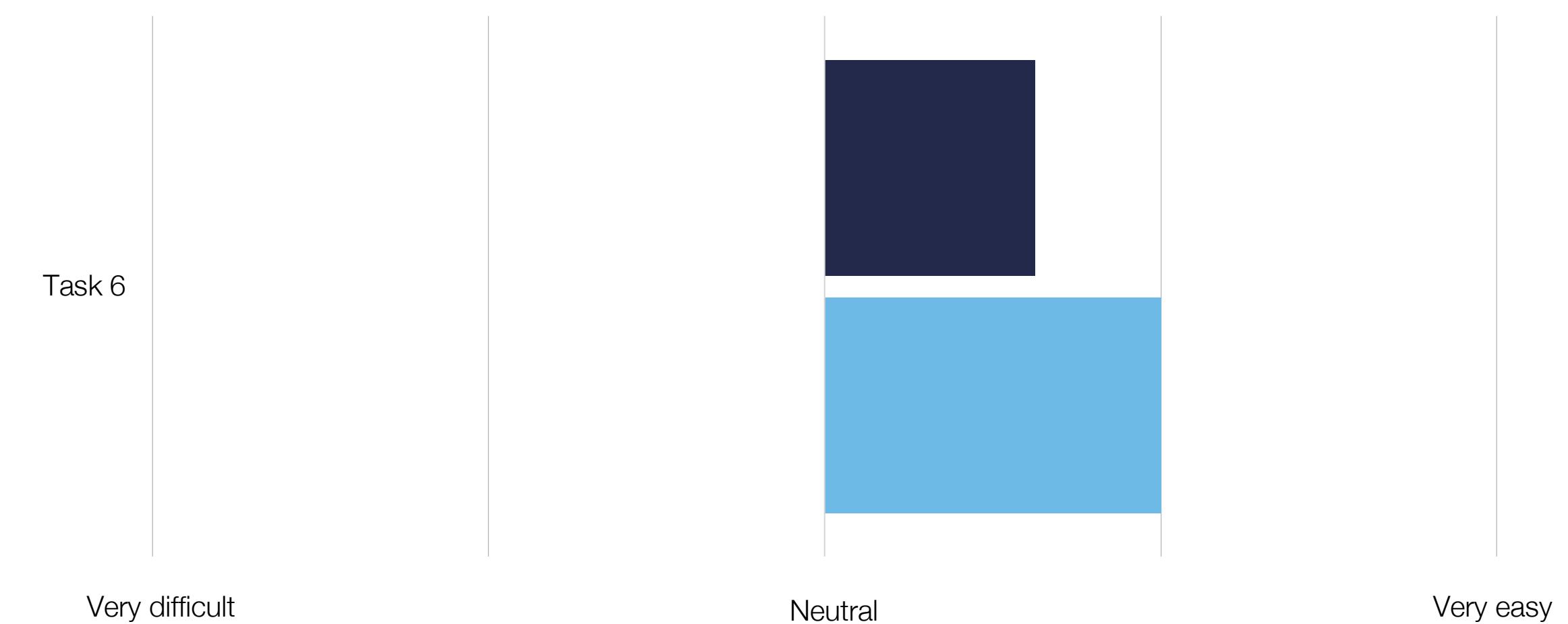
Decrease in
time on task



Average task usability

38% ↑

Increase in
ease of use



Task 6 - Subscription to email notifications - cont.

Observations

- ▶ Most of the participants went to the link (Notification references for account alerts) under related information.
- ▶ After using the Notification Preference in Related Services (overview), one user also found the register link into the PT. Even if the task was easy, some users would have preferred to have access to their profile / account for changing their communication channel.
- ▶ This may already be done, but is not apparent in the information available to Shumac. It is unclear if subscribing to the notifications also subscribes the user to the emails, and vice versa. Also, it is unclear how can one subscribe to the notifications if the PT area is empty.

“Weird place the progress tracker. This is not a progress, this is an update to your file, you are trying to get registered.”

“I would have skipped over that to update my contact information, it would be found under my profile.”

Recommendations

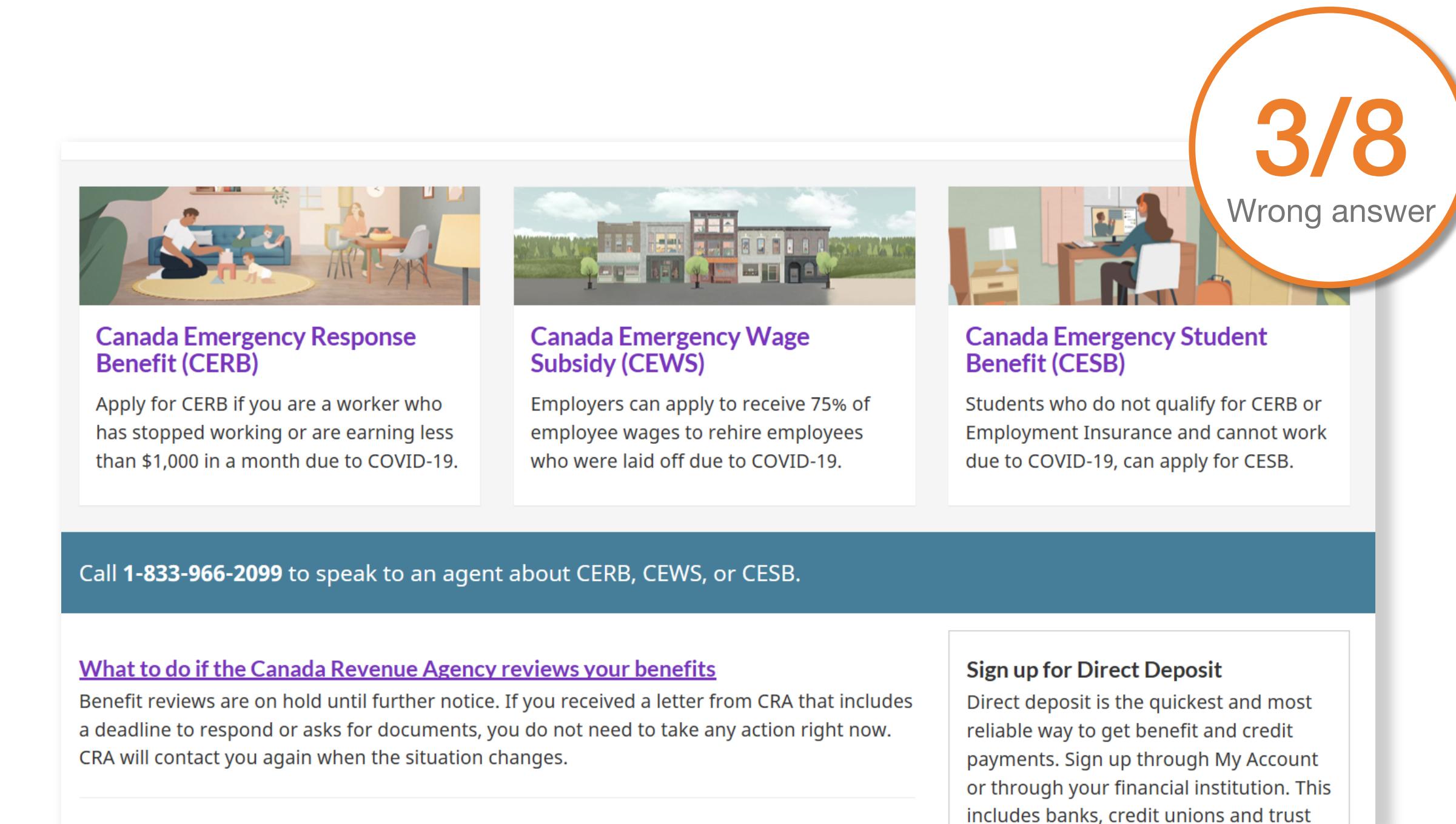
- ▶ Improve the labeling for helping users finding the place to change their channel and be sure to allow them to change it under their profile.
- ▶ Define the mechanisms for “interaction preferences” jointly for email and for notifications.

Task 1 - Benefit reviews are on hold - cont.

Issues identified

Unclear link name impacts performance

- ▶ Benefit reviews link name did not resonate with **3/8** participants
- ▶ **4/8** participants didn't read the doormat text (which had the correct answer). 3 of them failed this task.
- ▶ Participants had a better chance of success when they read the doormat.



3/8
Wrong answer

Canada Emergency Response Benefit (CERB)
Apply for CERB if you are a worker who has stopped working or are earning less than \$1,000 in a month due to COVID-19.

Canada Emergency Wage Subsidy (CEWS)
Employers can apply to receive 75% of employee wages to rehire employees who were laid off due to COVID-19.

Canada Emergency Student Benefit (CESB)
Students who do not qualify for CERB or Employment Insurance and cannot work due to COVID-19, can apply for CESB.

Call 1-833-966-2099 to speak to an agent about CERB, CEWS, or CESB.

[What to do if the Canada Revenue Agency reviews your benefits](#)
Benefit reviews are on hold until further notice. If you received a letter from CRA that includes a deadline to respond or asks for documents, you do not need to take any action right now. CRA will contact you again when the situation changes.

Sign up for Direct Deposit
Direct deposit is the quickest and most reliable way to get benefit and credit payments. Sign up through My Account or through your financial institution. This includes banks, credit unions and trust

Recommendations

- ▶ Rename Benefit Reviews link name to something that resonates with users more to increase scent of information

P4: "No, I'm pretty sure that wouldn't be what I'd be looking for..."

P4 doesn't click the Benefit Reviews link due to unclear link name.

Task 7 - Status of 2016 Return Adjustment Request

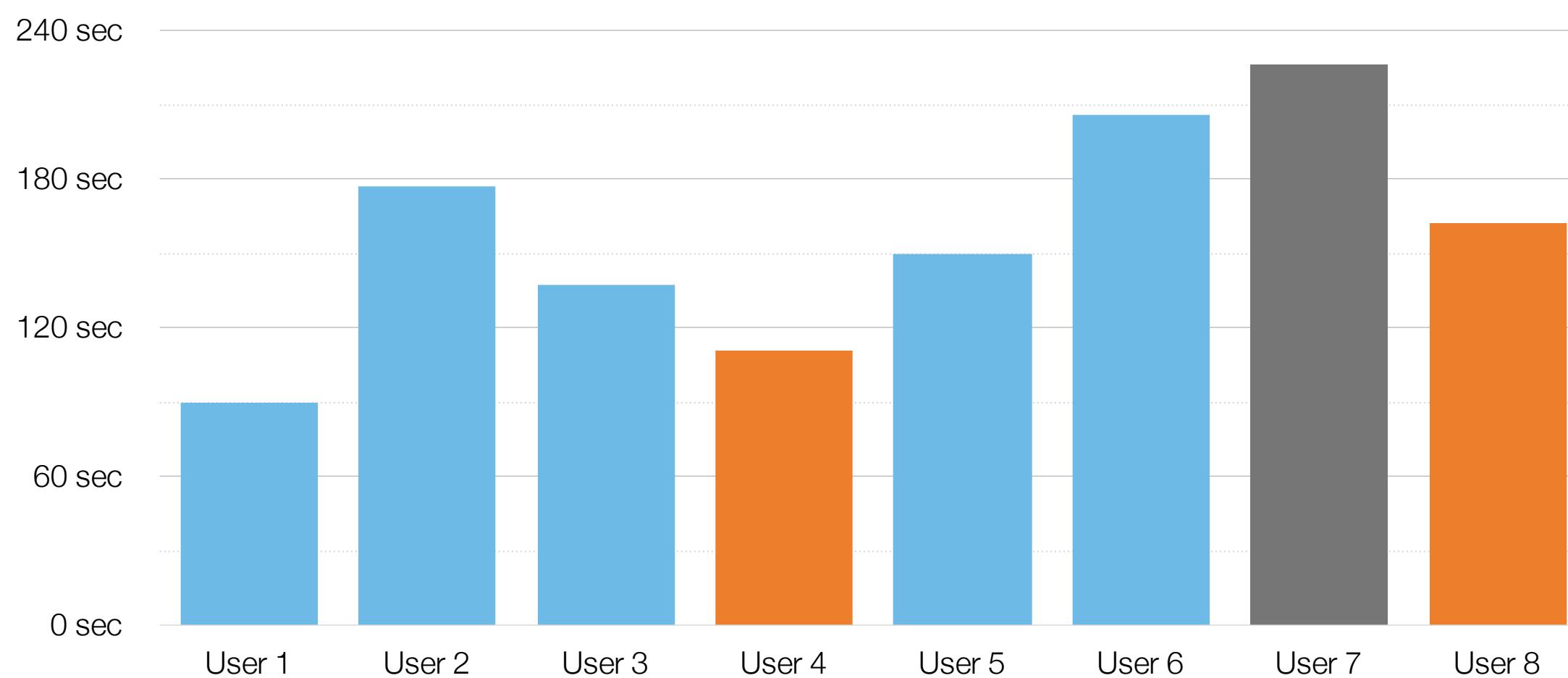
Success Minor Mistake Fail

Find out the next step in processing your 2016 T1 adjustment request.

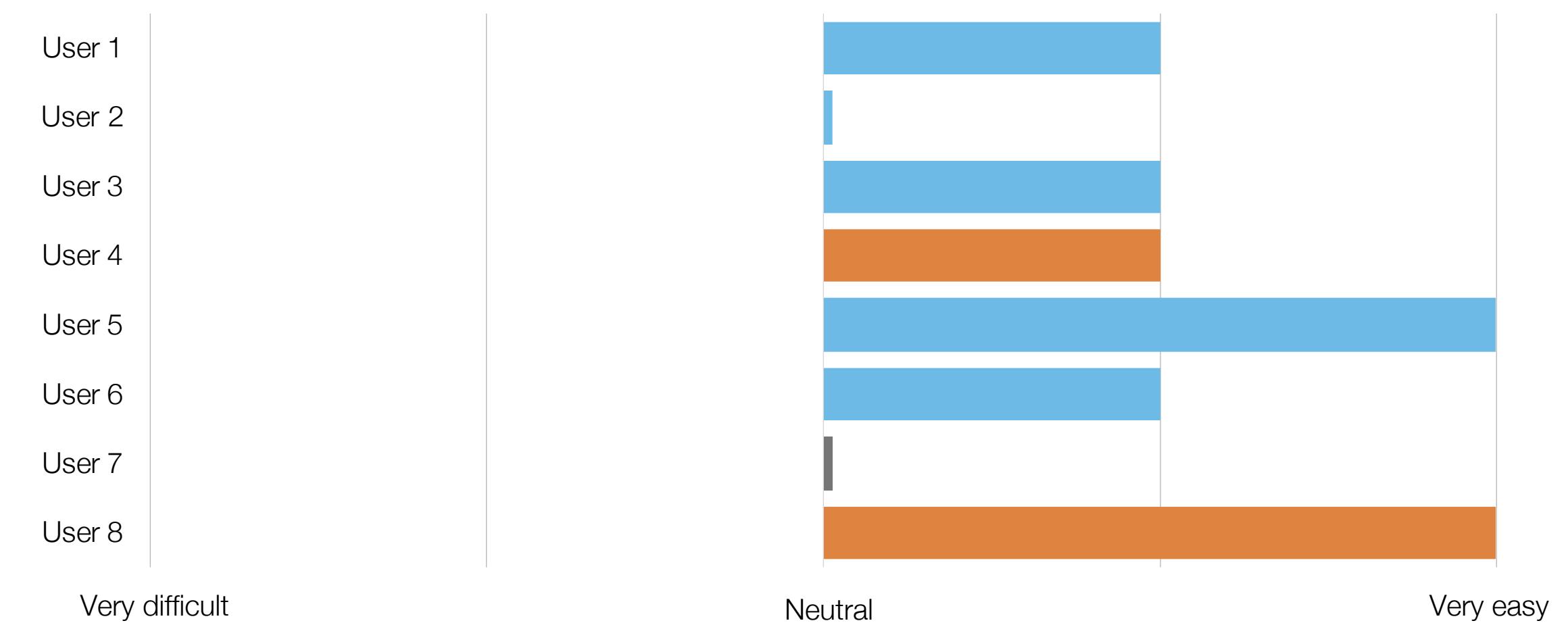
5/8

Users were Successful

Time on task



Perceived ease of use



Task 7 - Status of 2016 Return Adjustment Request comparison

User Test 1 User Test 2

Task completion

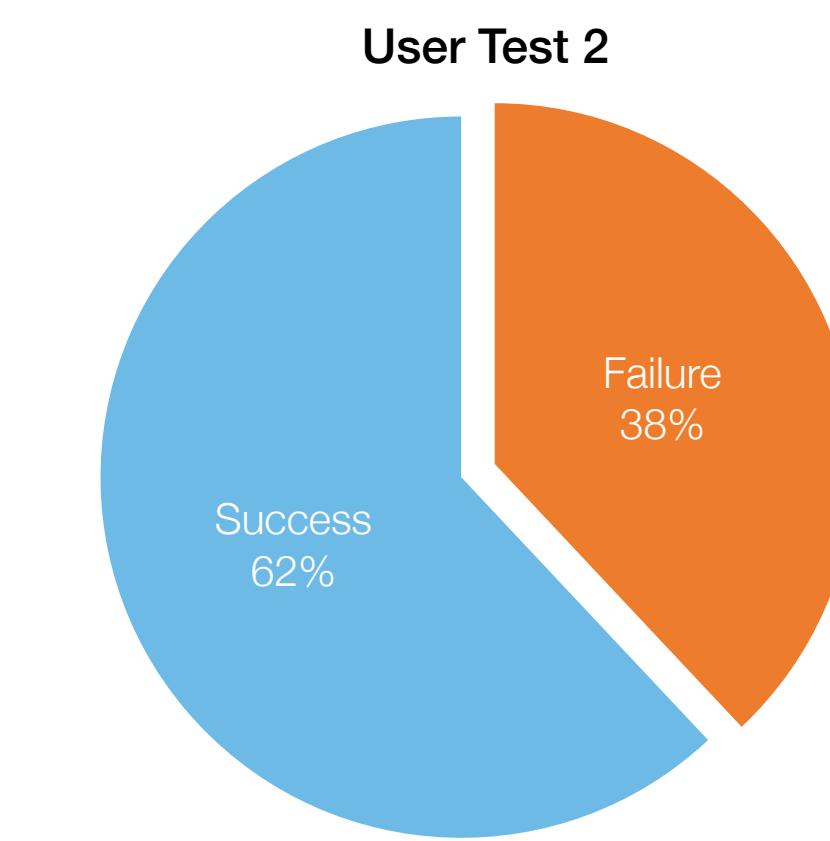
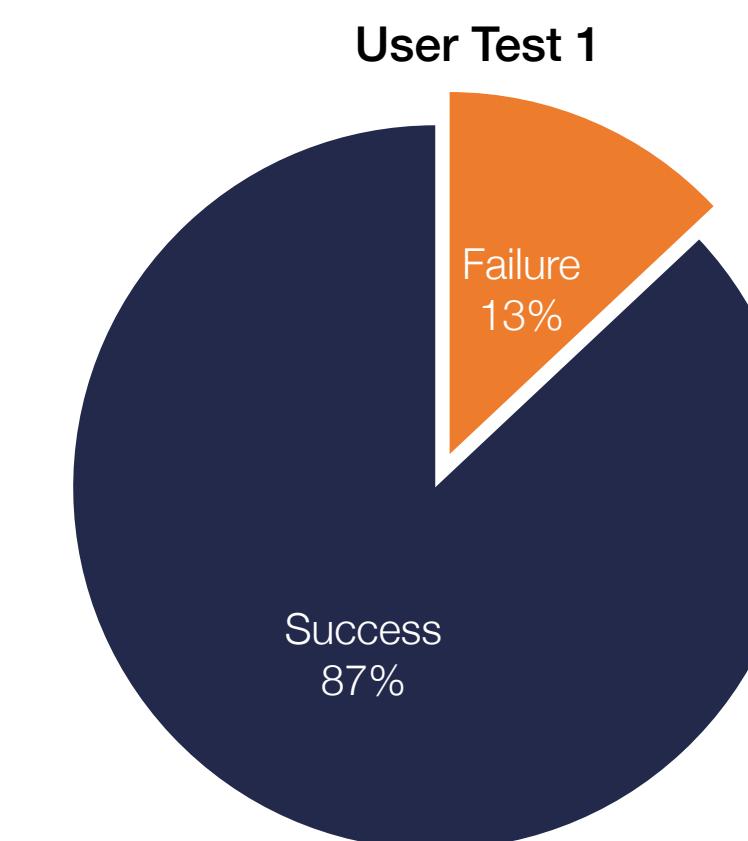
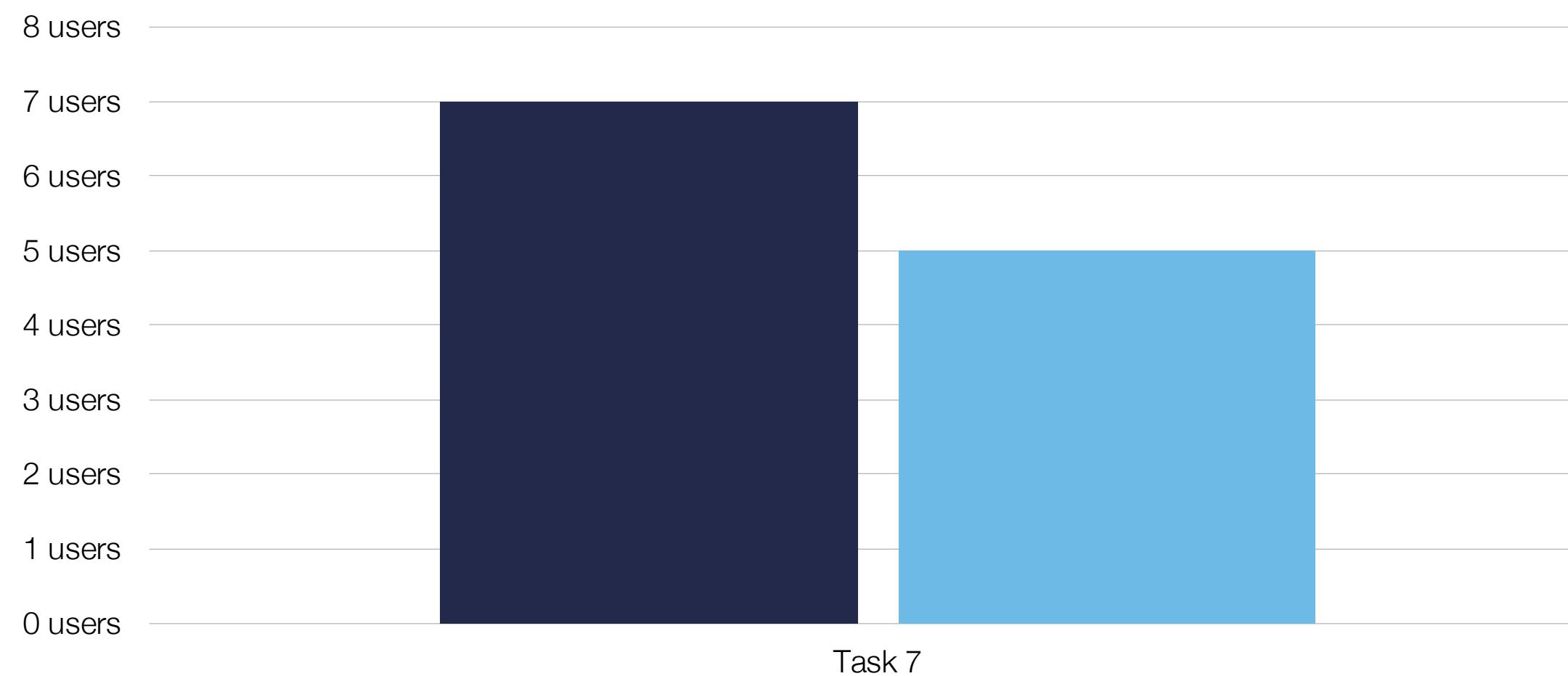
28% ↓

Decrease in
task completion

Average success rate

28% ↓

Decrease in
success rate



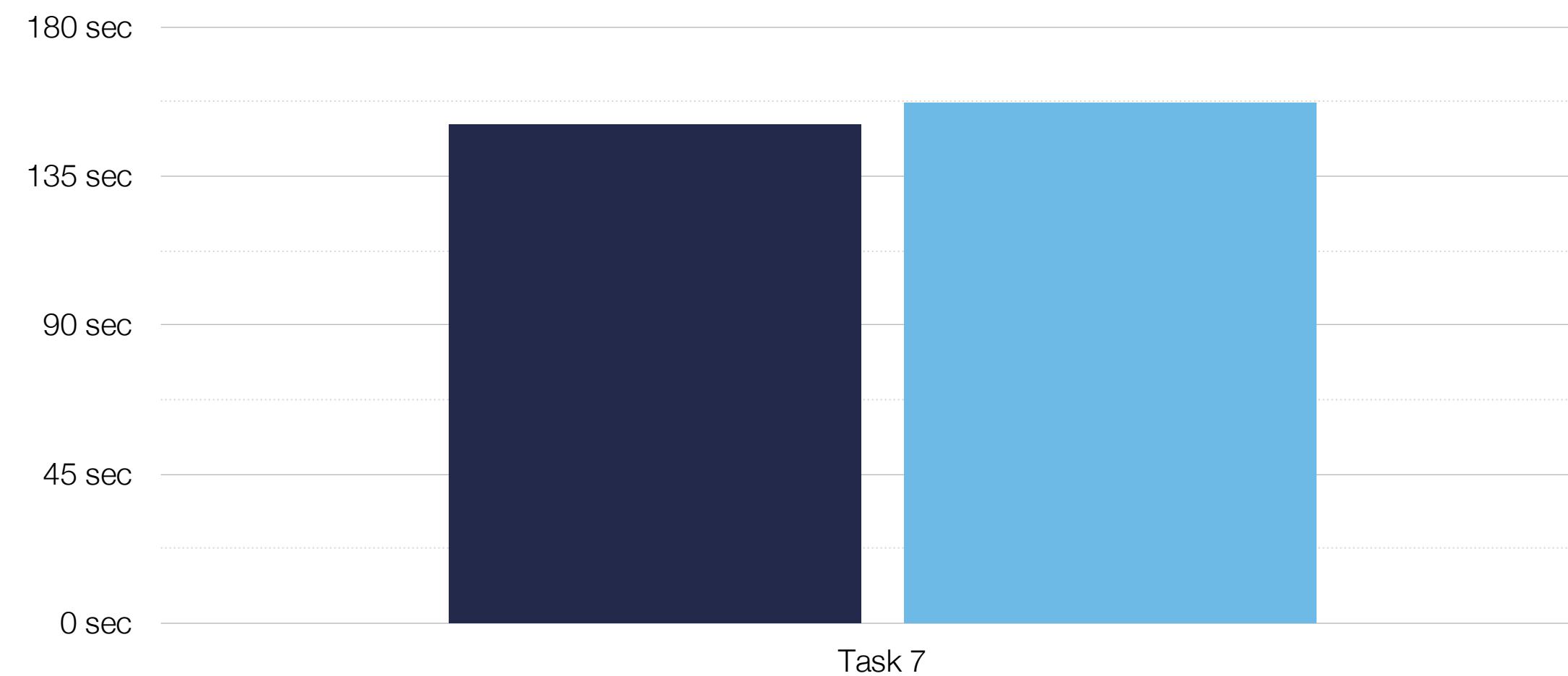
Task 7 - Status of 2016 Return Adjustment Request - cont.

■ Baseline Test ■ Retest

Average time on task

4%
↑

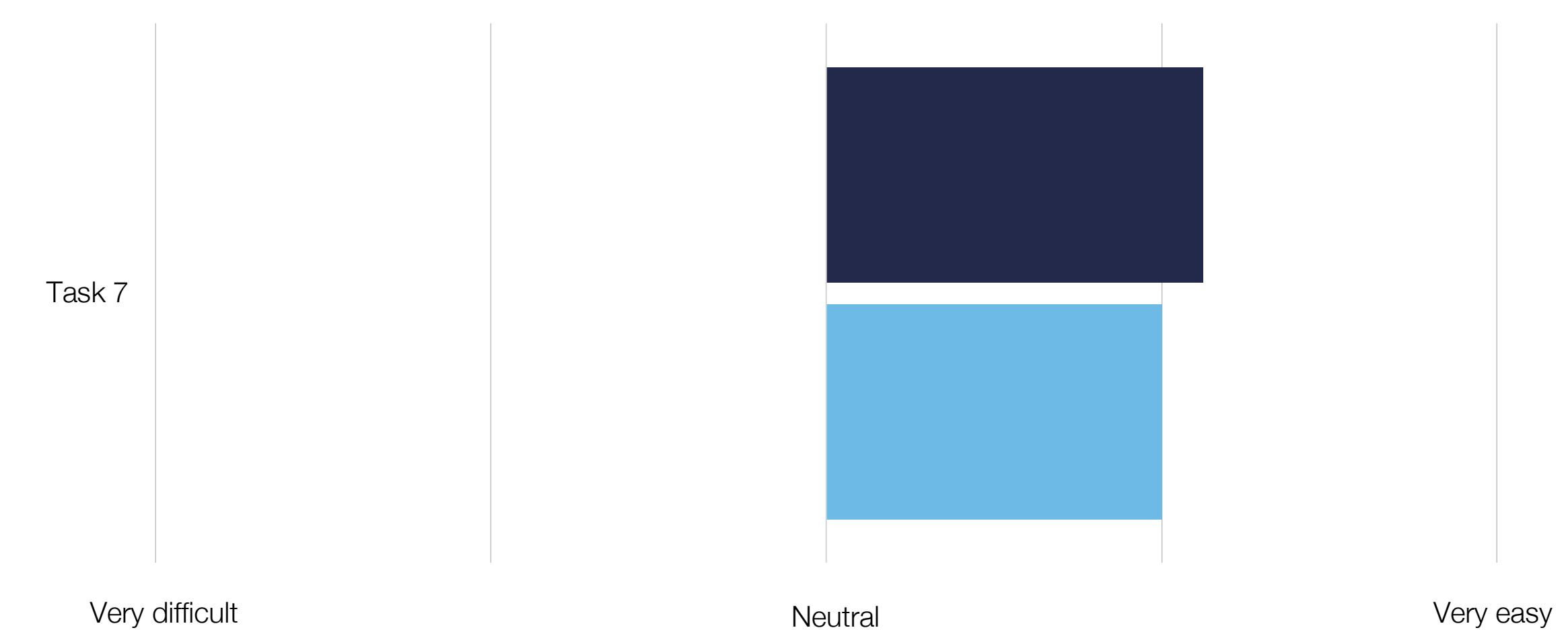
Increase in
time on task



Average task usability

11%
↓

Decrease in
ease of use



Task 7 - Status of 2016 Return Adjustment Request - cont.

Observations

- ▶ The “major wrong” results were, in part, related to the nature of instructions where the focus was on the terms “status details”. Both of them found the letter adjustment request before opening the accordion on statuses.

“That is a big confusion, because they say that they denied it and it says that I might need something to complete that adjustment.”

“I'm looking for under related services, somewhere it says status details.”

“I would find the details of the status on this page, but not the details of why it was denied.”

Recommendations

- ▶ Revise the instruction, with emphasis on the changing or new status. For example: “You received a communication from the CRA advising you that there is a change in the status of a 2016 T1 adjustment request that you had made. Where would you go?
- ▶ Also, for all communications, avoid providing an “empty email page”. Rather, provide the user with proper content (e.g., a letter).

Task 8 - Letter for the 2019 Return

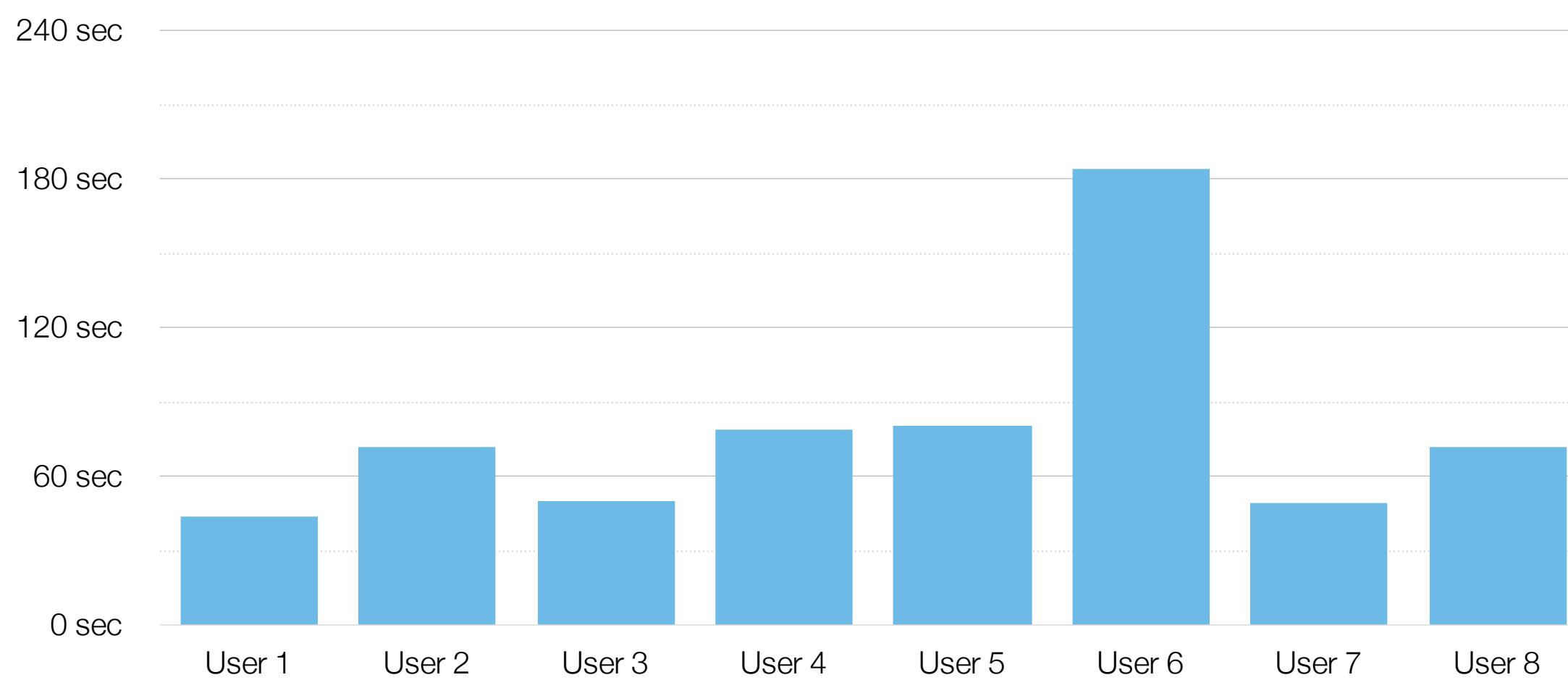
■ Success ■ Minor Mistake ■ Fail

*View online the letter
that was sent regarding
a 2019 Tax Return.*

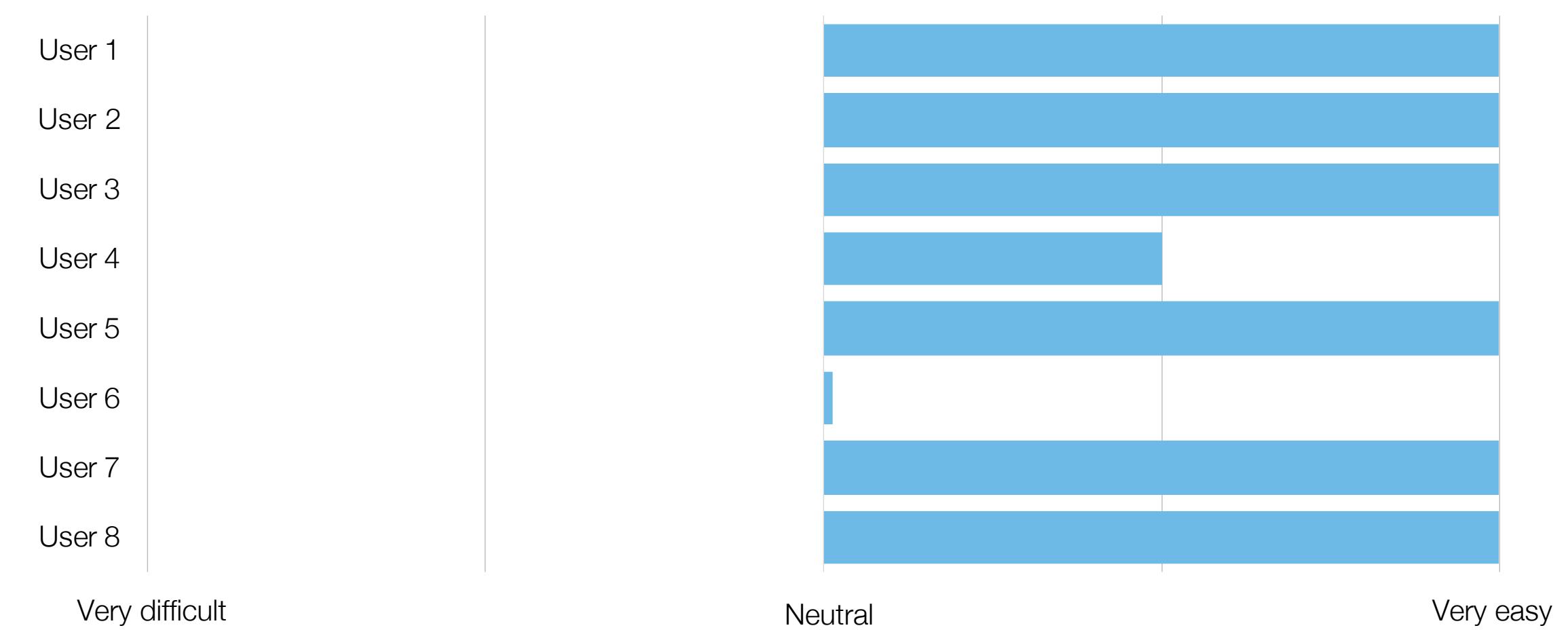
8/8

Users were
Successful

Time on task



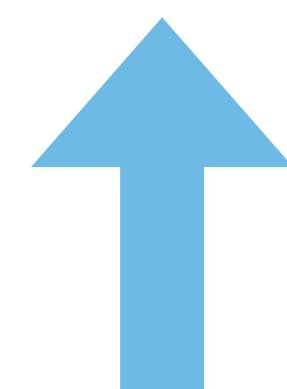
Perceived ease of use



Task 8 - Letter for the 2019 Return comparison

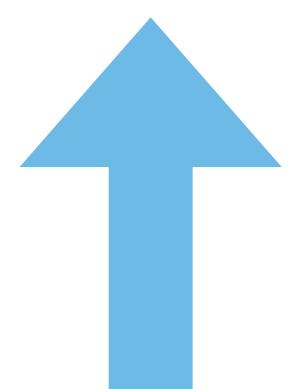
User Test 1 User Test 2

Task completion

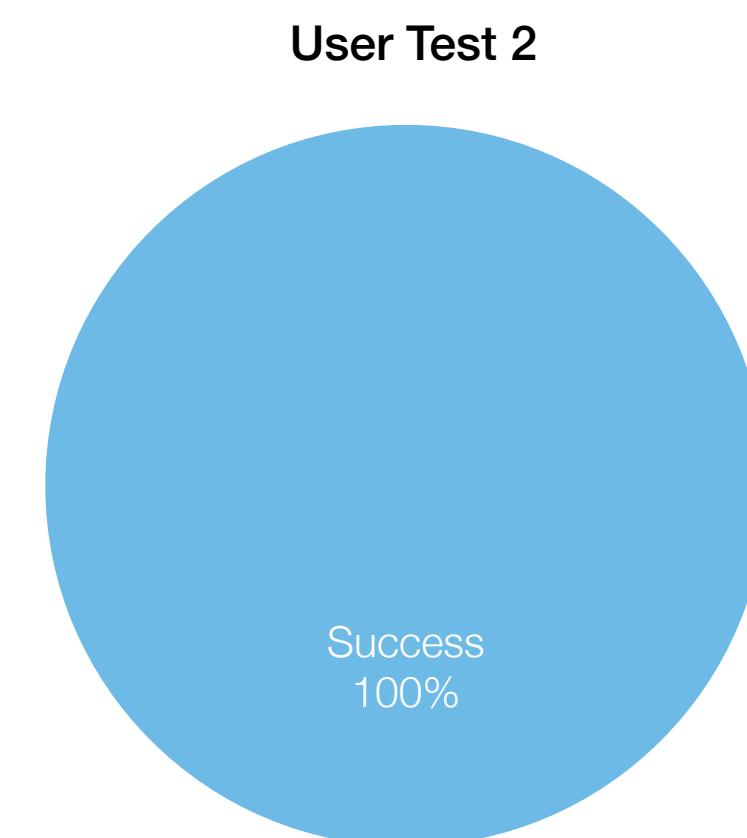
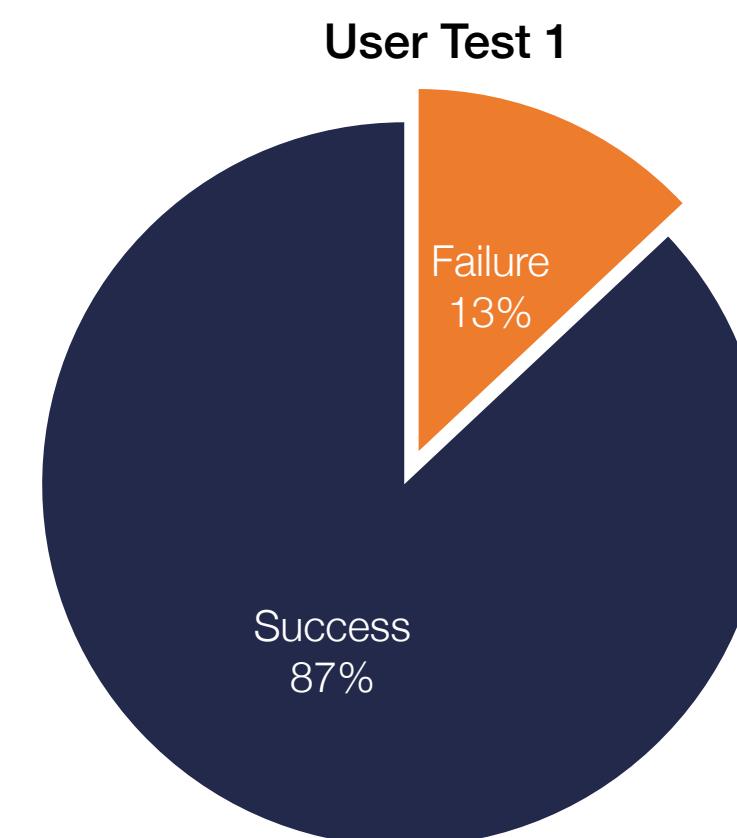
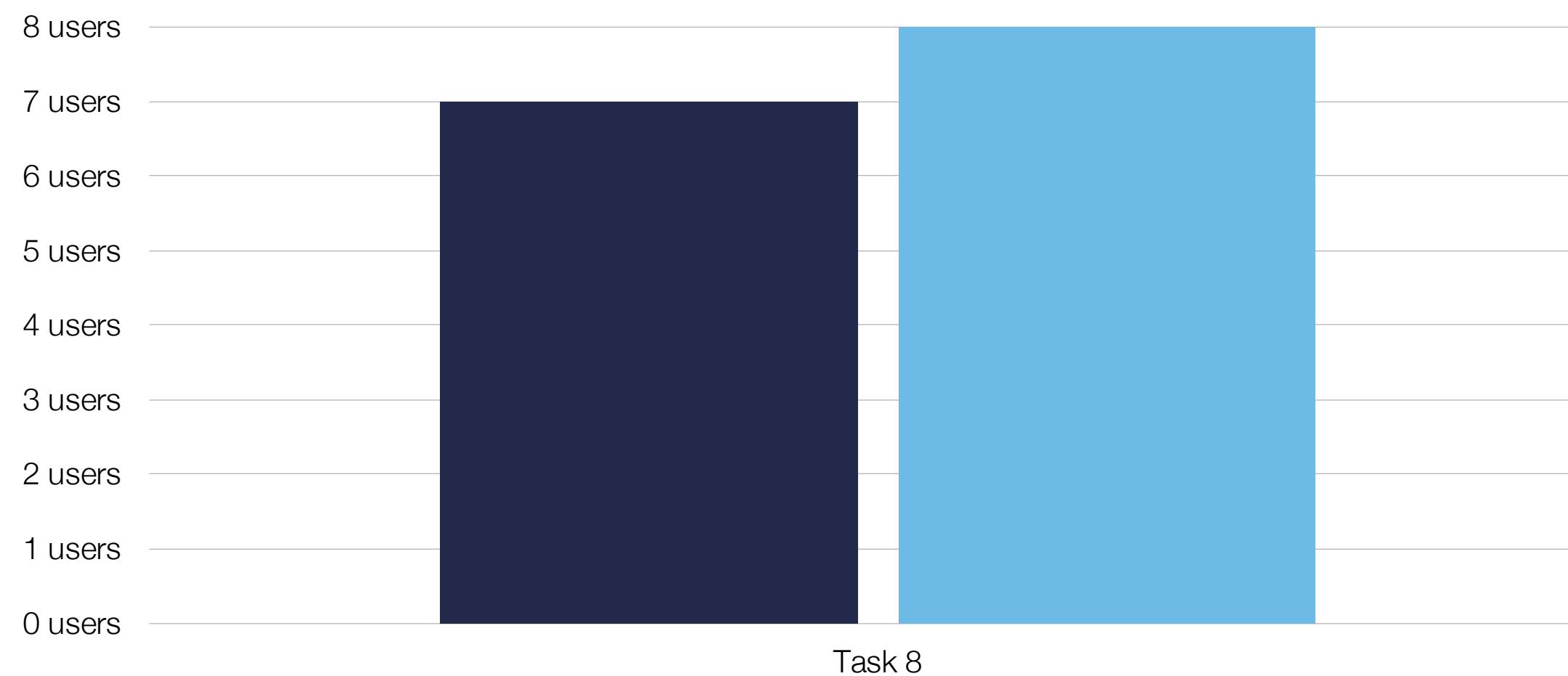
13%

Increase in
task completion

Average success rate

28%

Increase in
success rate



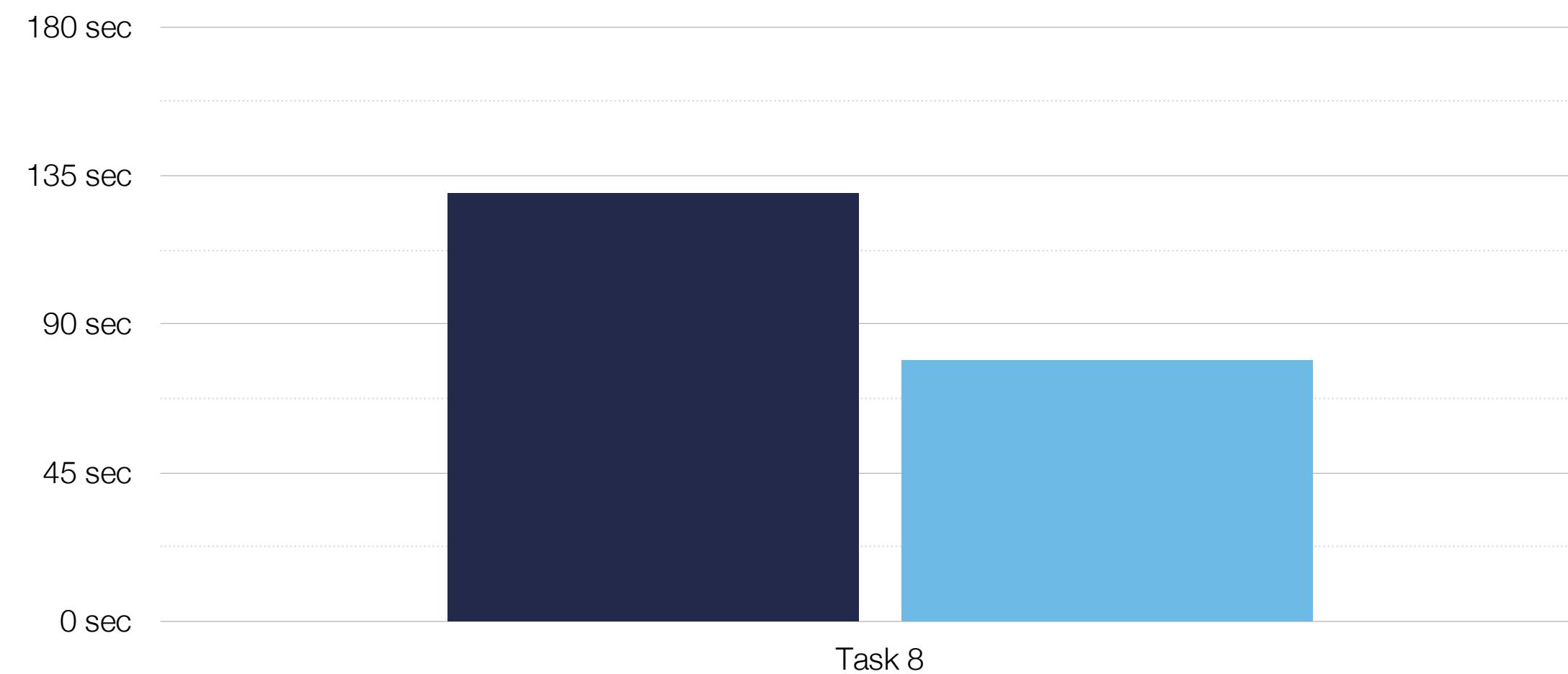
Task 8 - Letter for the 2019 Return - cont.

■ Baseline Test ■ Retest

Average time on task

39%
↓

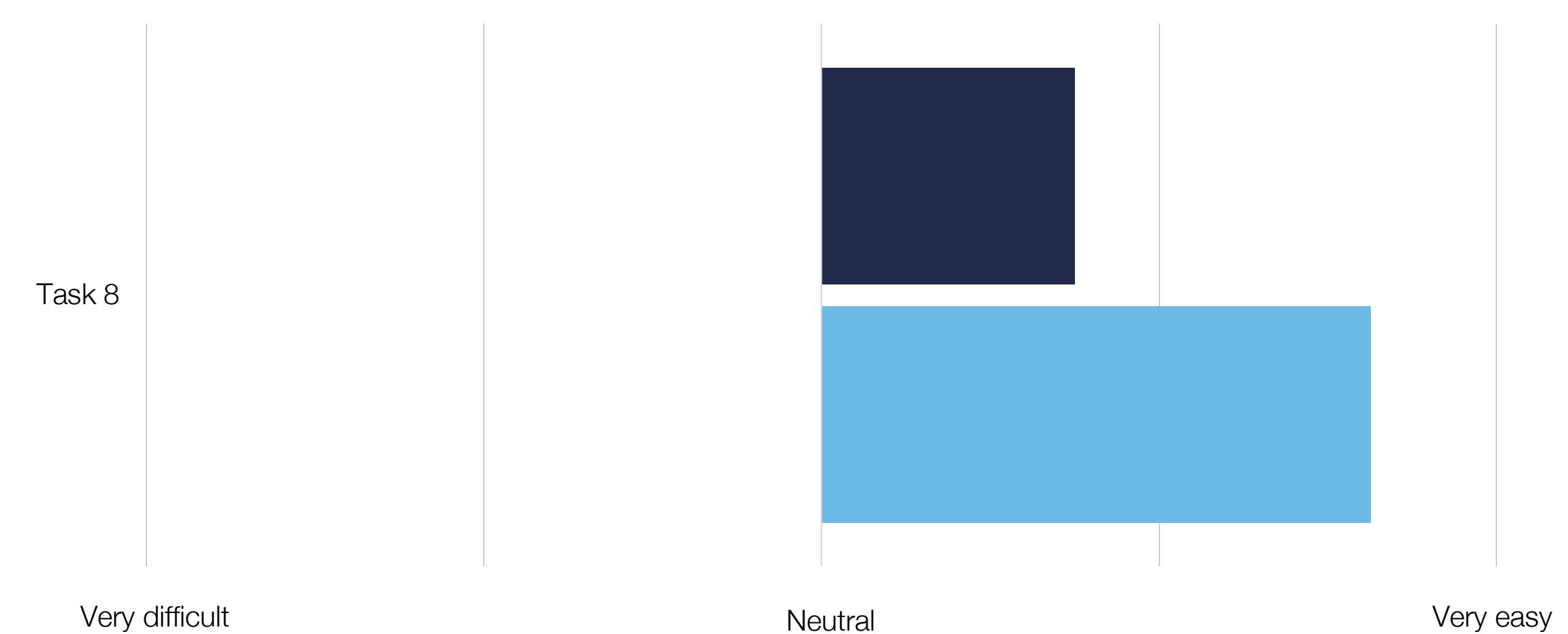
Decrease in
time on task



Average task usability

117%
↑

Increase in
ease of use



Task 8 - Letter for the 2019 Return- cont.

Observations

- ▶ All participants succeeded at this task fairly fast.

Recommendations

- ▶ None

Overall Observations and Recommendations

Observations

- ▶ While “low level” recommendations from the UT1 report have been implemented, there remains the following issues:
 - ▶ A number of larger, more significant issues, still need to be considered. Those have been grouped in the “High-Level Issues” sub-section of this report.
 - ▶ A number of detailed design issues exist and need to be catered to. Those have been grouped in the “Detailed Design Issues” sub-section of this report.
- ▶ These issues were identified by observing the users’ behaviors and by factoring in the design experience of Shumac staff.
- ▶ As was mentioned in the UT1 report, the participants spent a great deal of time reading the content of the progress tracker. The presentation of the information should be improved to minimize the need to read all of its content. For example, in the fragment shown to the right:
 - ▶ The user has to read the content of each group of data to determine what needs to be done, if anything.
 - ▶ There is no logical (to the user) sequence to the information: the first item is for 2019, the next ones are 2015, 2016, 2018.
 - ▶ The meaning of the “updated” item is unclear.
- ▶ An alternate, simpler, idea could be as shown in the far right fragment.

Recommendations

- ▶ A related issue, and recommendation, is that users are looking for islands of information, using the title or heading of an “island” (or box, for the prototype). This is associated to the “scent of the information.” If a task has to do with a tax return, or with a Canada Child Benefit application, this is the information that will provide the initial scent, and where the user is likely to go to. Therefore, the notion of separating the “topics” from the “progress on the topics” is likely to lead to unnecessary navigation and effort, even if eventually they succeed. This problem will grow as the number of items covered by the PT module will grow. This was supported by several user statements to this effect.



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Questions?

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or Jonathan Rath

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