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Progress Tracker

UT2 and UT3 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 user testing session 2 (UT2).

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

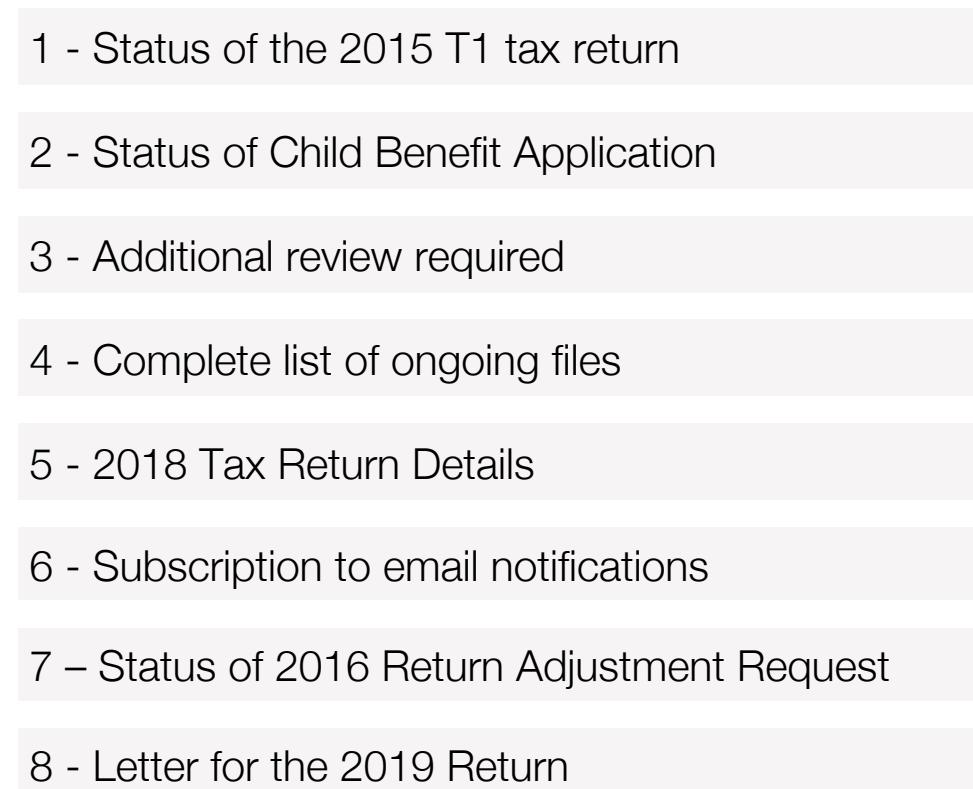
This UX Scorecard will:

- ▶ 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 UT2
 - ▶ 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.

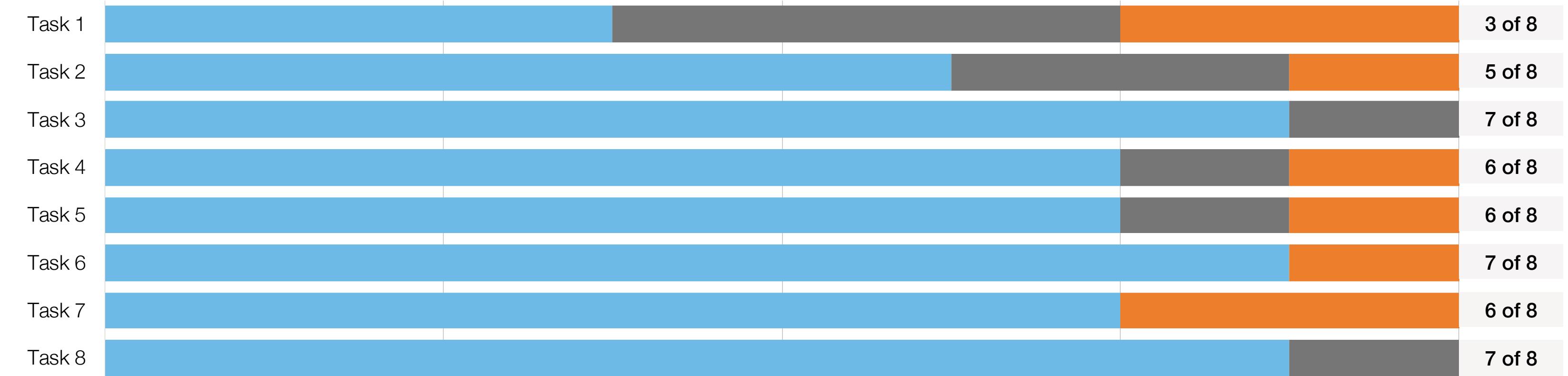
Summary of results

Success Minor Mistake Fail

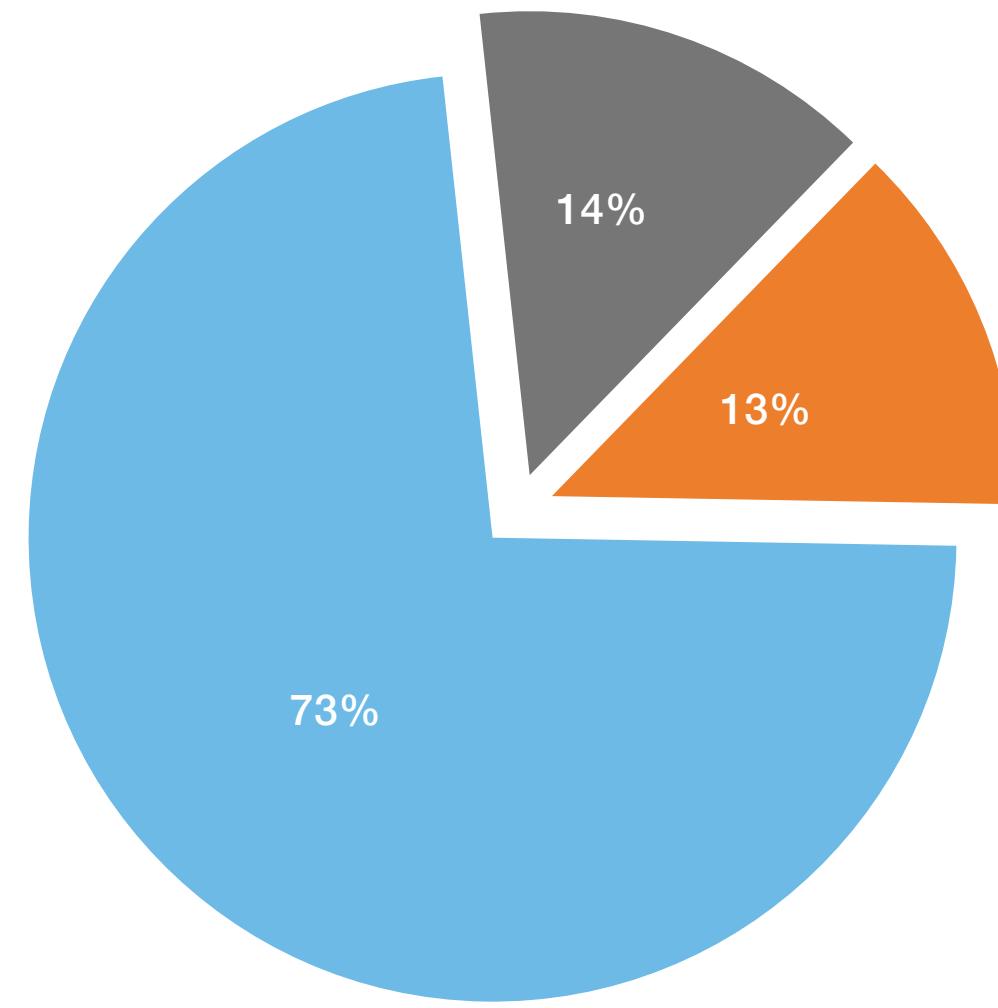
Task names



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	1106s	470s	347s	417s	306s	235s	136s	250s	6m 48s
Task 2	673s	243s	89s	259s	176s	142s	143s	108s	3m 49s
Task 3	400s	148s	92s	164s	295s	89s	232s	73s	3m 7s
Task 4	498s	63s	102s	74s	58s	67s	43s	117s	2m 8s
Task 5	201s	143s	230s	230s	462s	57s	391s	370s	4m 21s
Task 6	278s	81s	148s	187s	163s	84s	45s	277s	2m 38s
Task 7	169s	49s	158s	81s	123s	52s	336s	49s	2m 7s
Task 8	416s	58s	103s	50s	62s	54s	116s	162s	2m 8s

* Mobile users

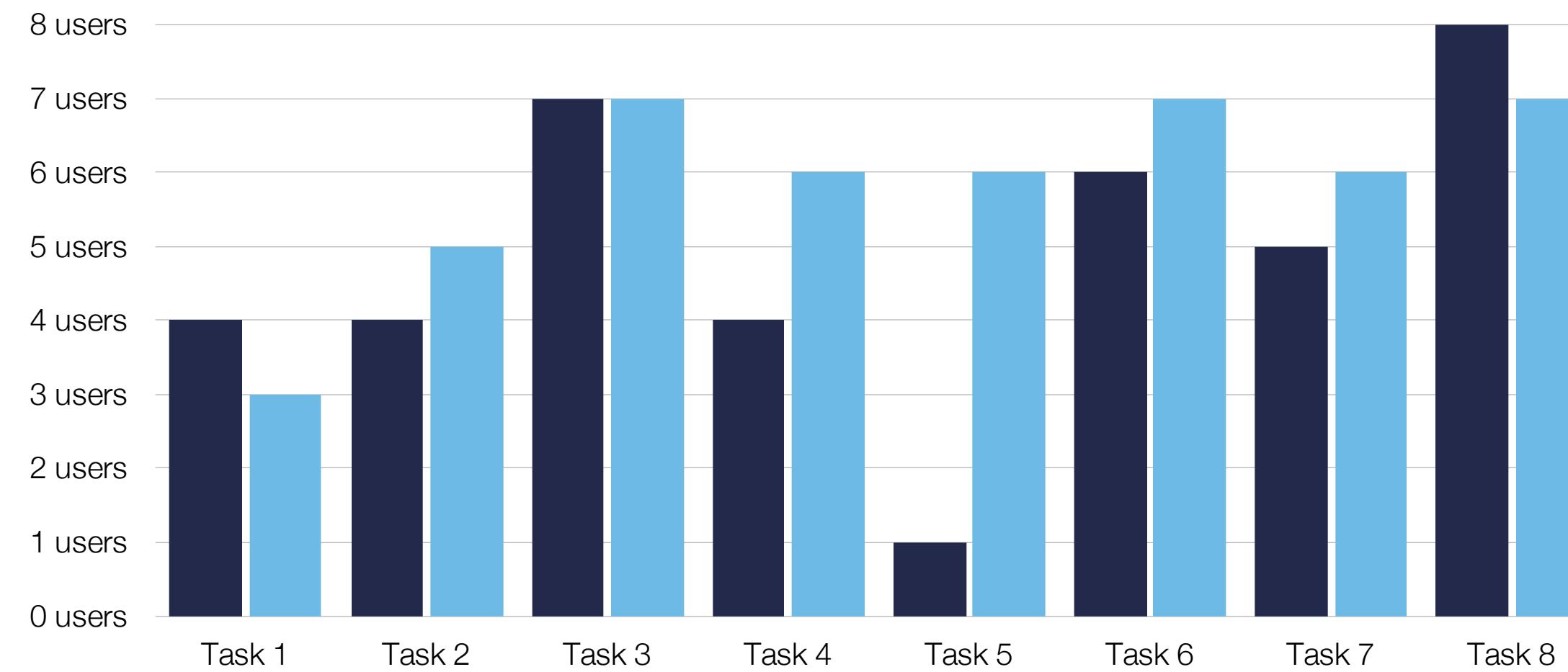
Overall comparative results

User Test 2 User Test 3

Task completion

20%
↑

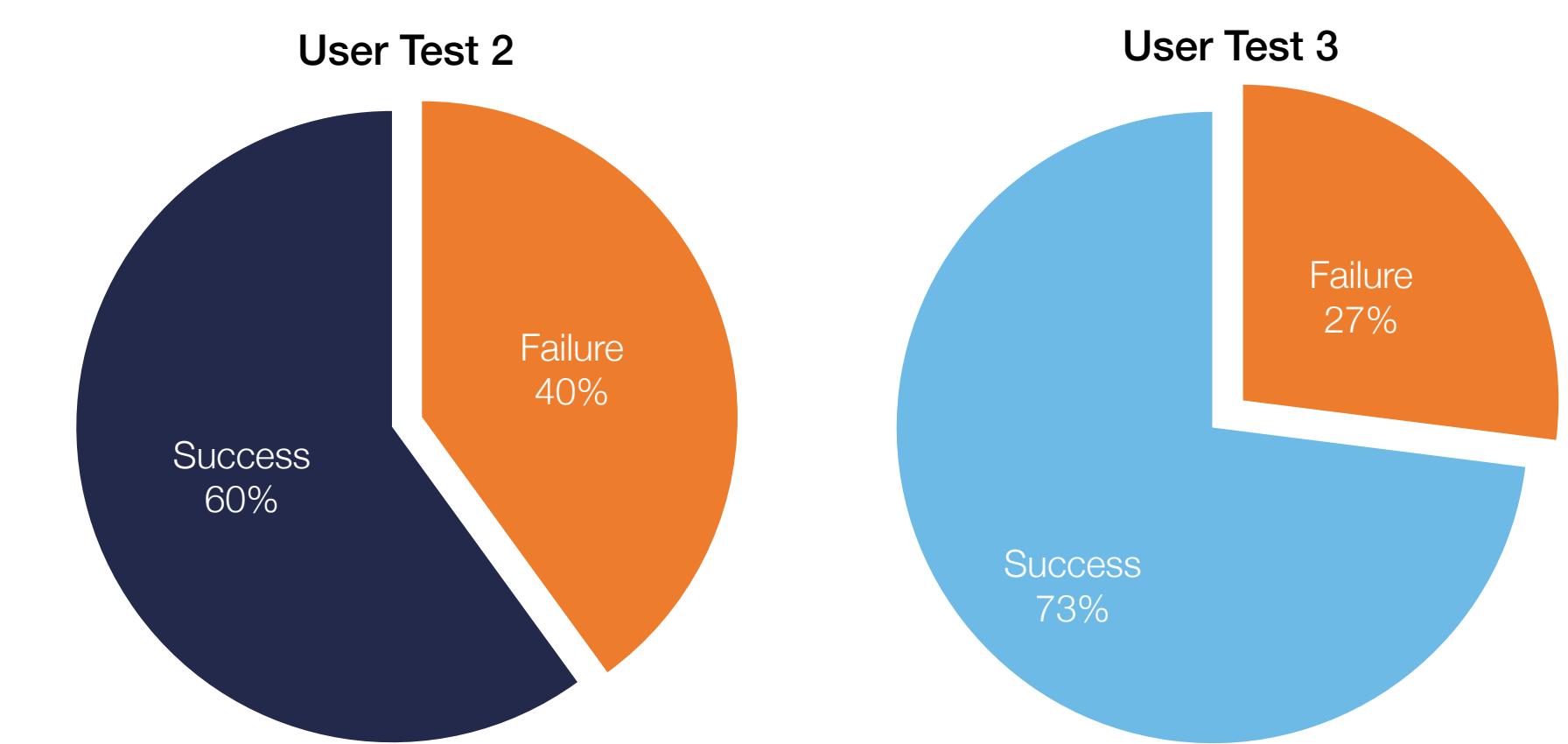
Increase in
task completion



Average success rate

22%
↑

Increase in
success rate



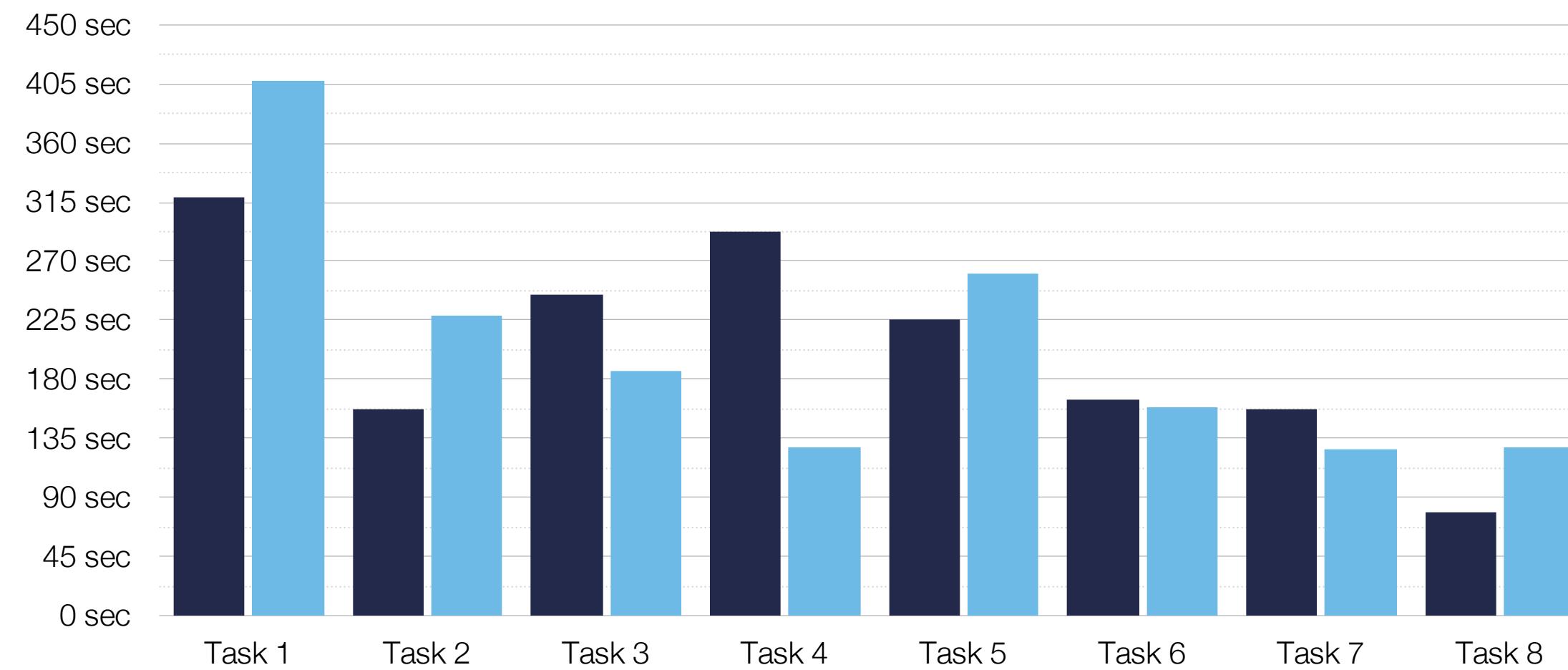
Overall comparative results - cont.

User Test 2 User Test 3

Average time on task

1% ↓

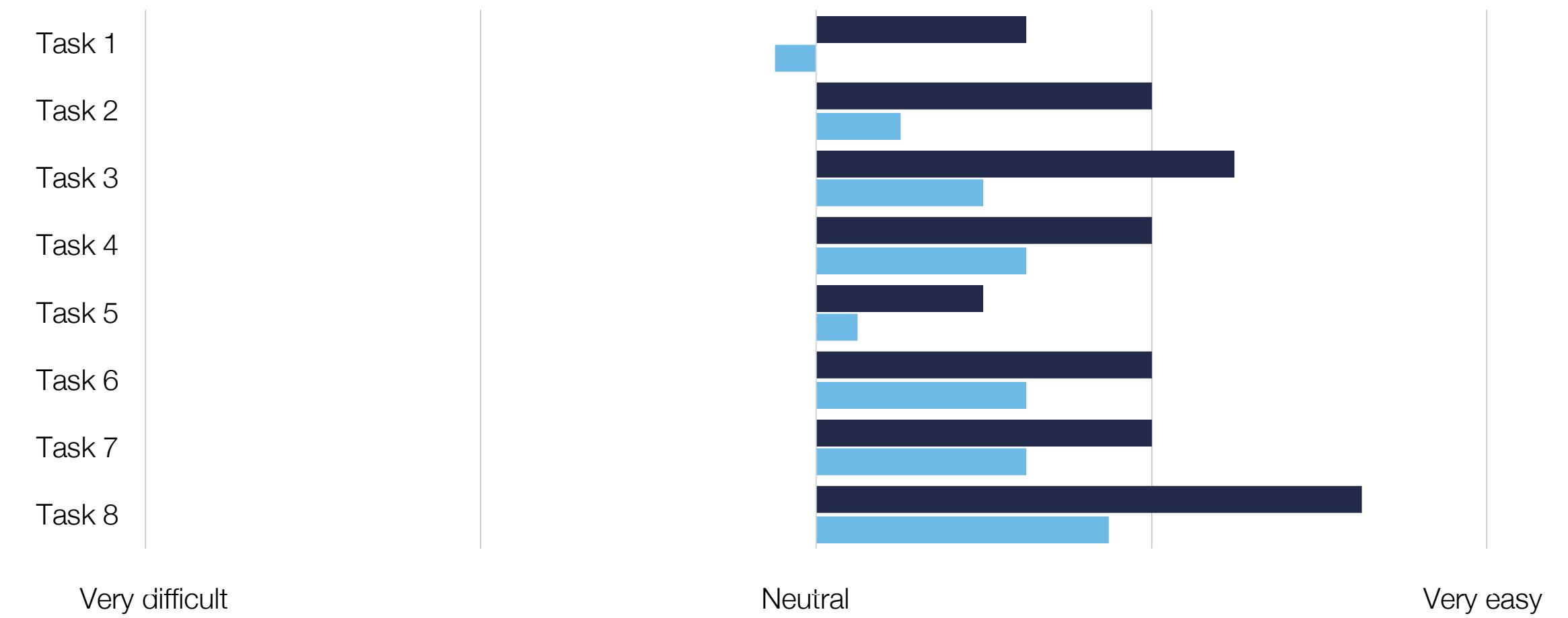
Reduction in
time on task



Average task usability

56% ↓

Decrease in
ease of use



Task 1 - Status of the 2015 T1 tax return

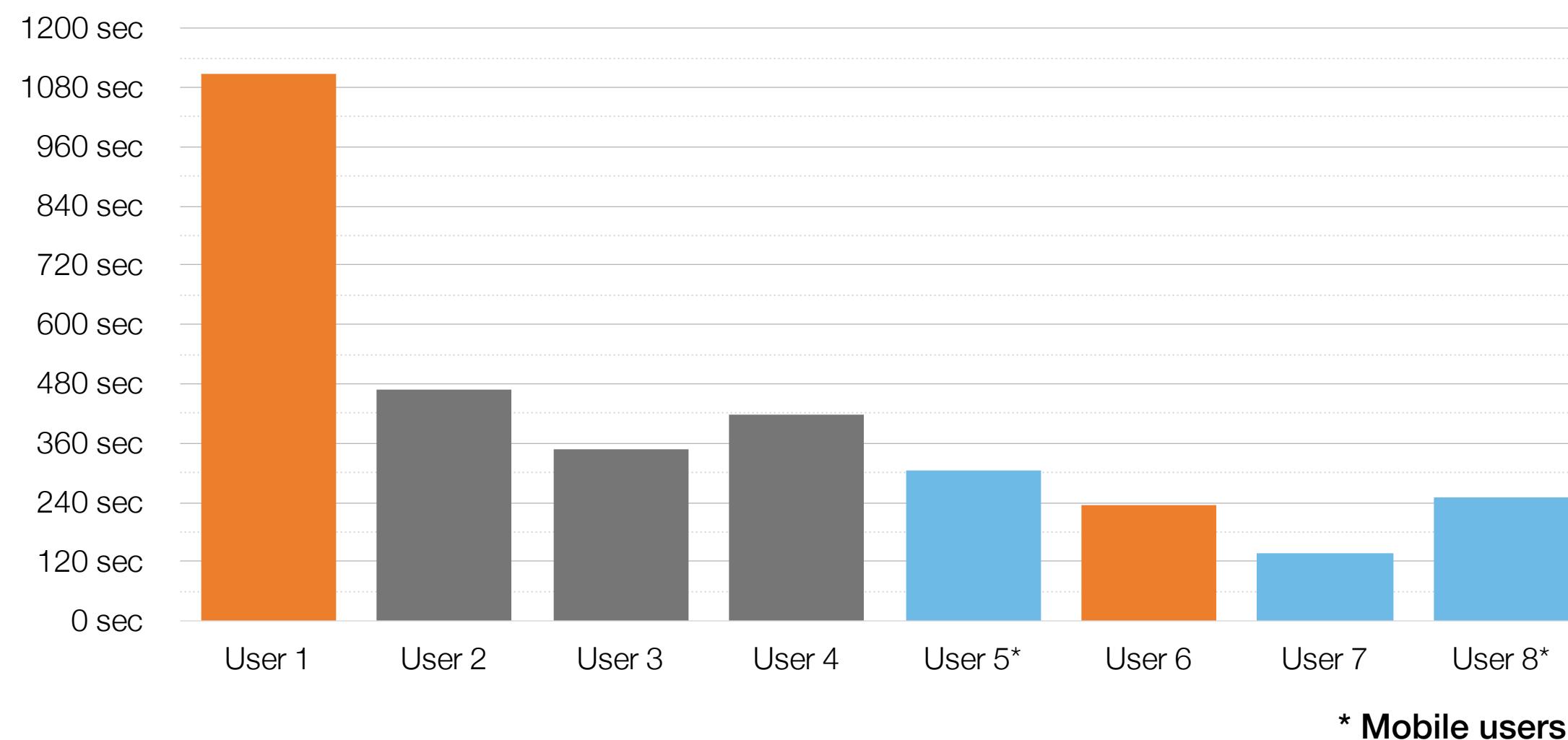
Success Minor Mistake Fail

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

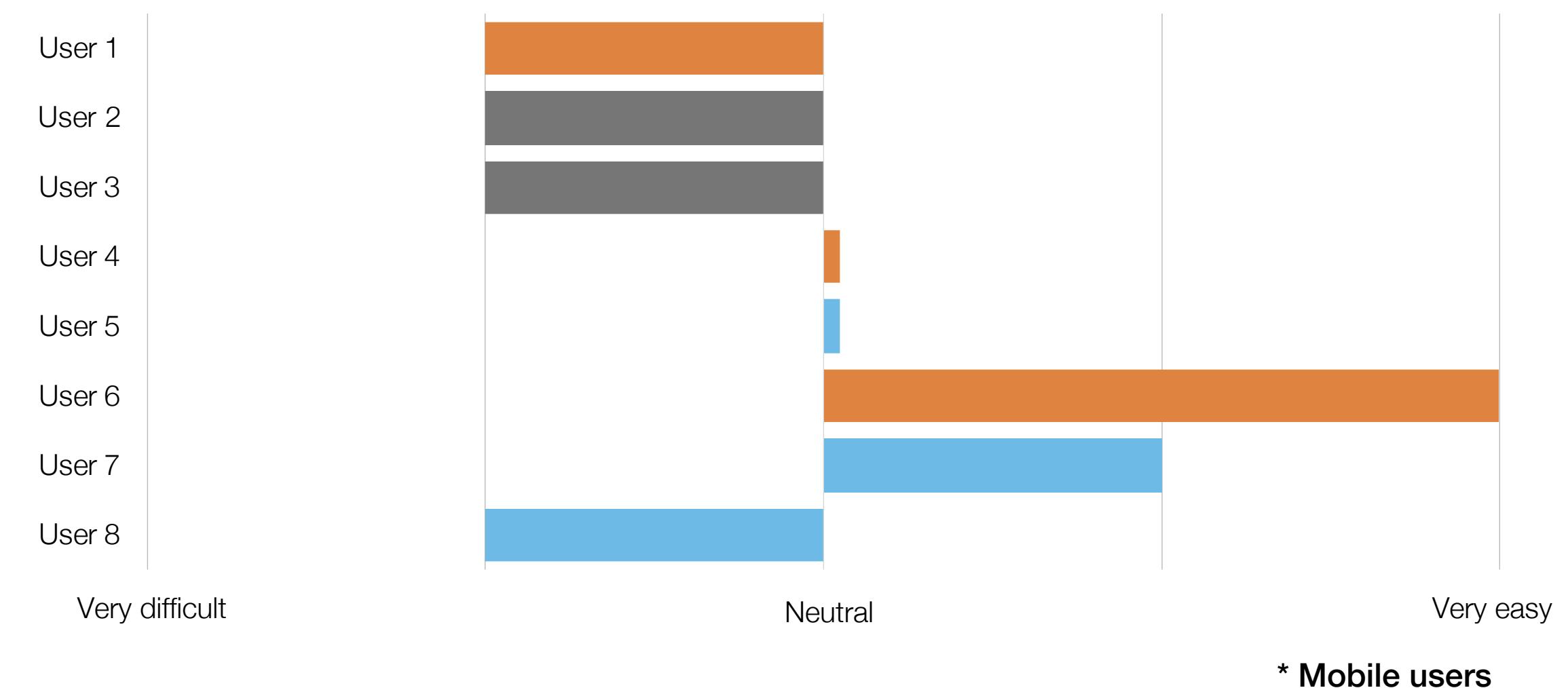
4/8

Users were
Successful

Time on task



Perceived ease of use



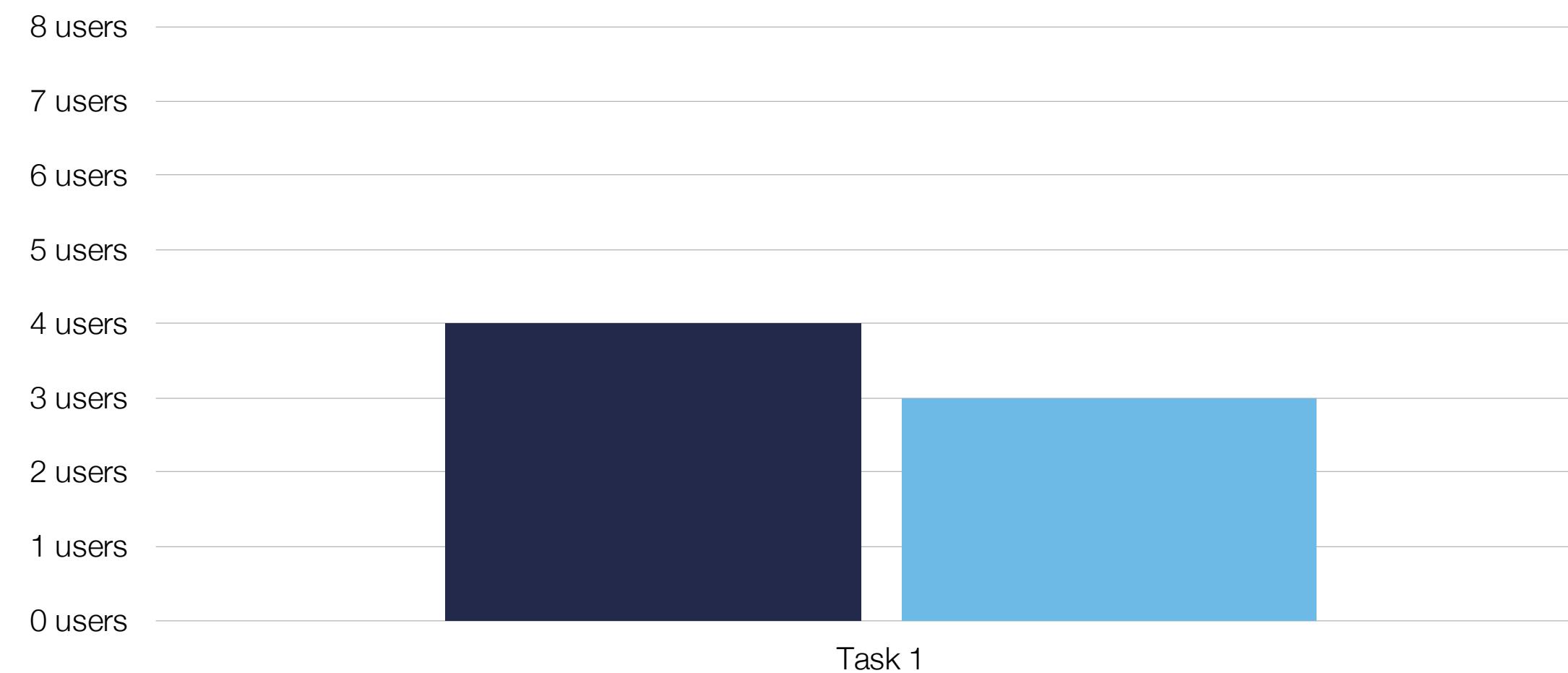
Task 1 - Status of the 2015 T1 tax return comparison

User Test 2 User Test 3

Task completion

25% ↓

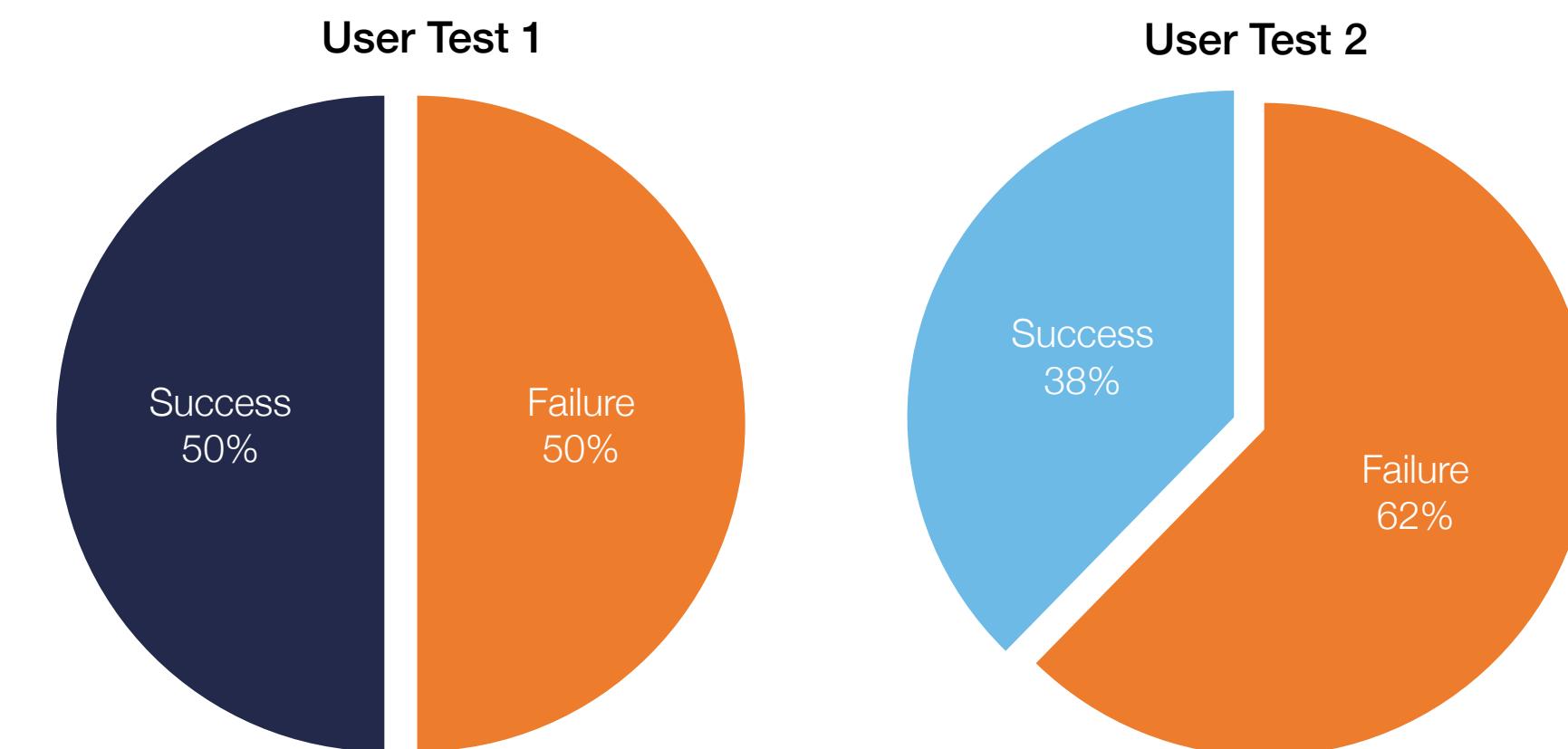
Decrease in
task completion



Average success rate

25% ↓

Decrease in
success rate



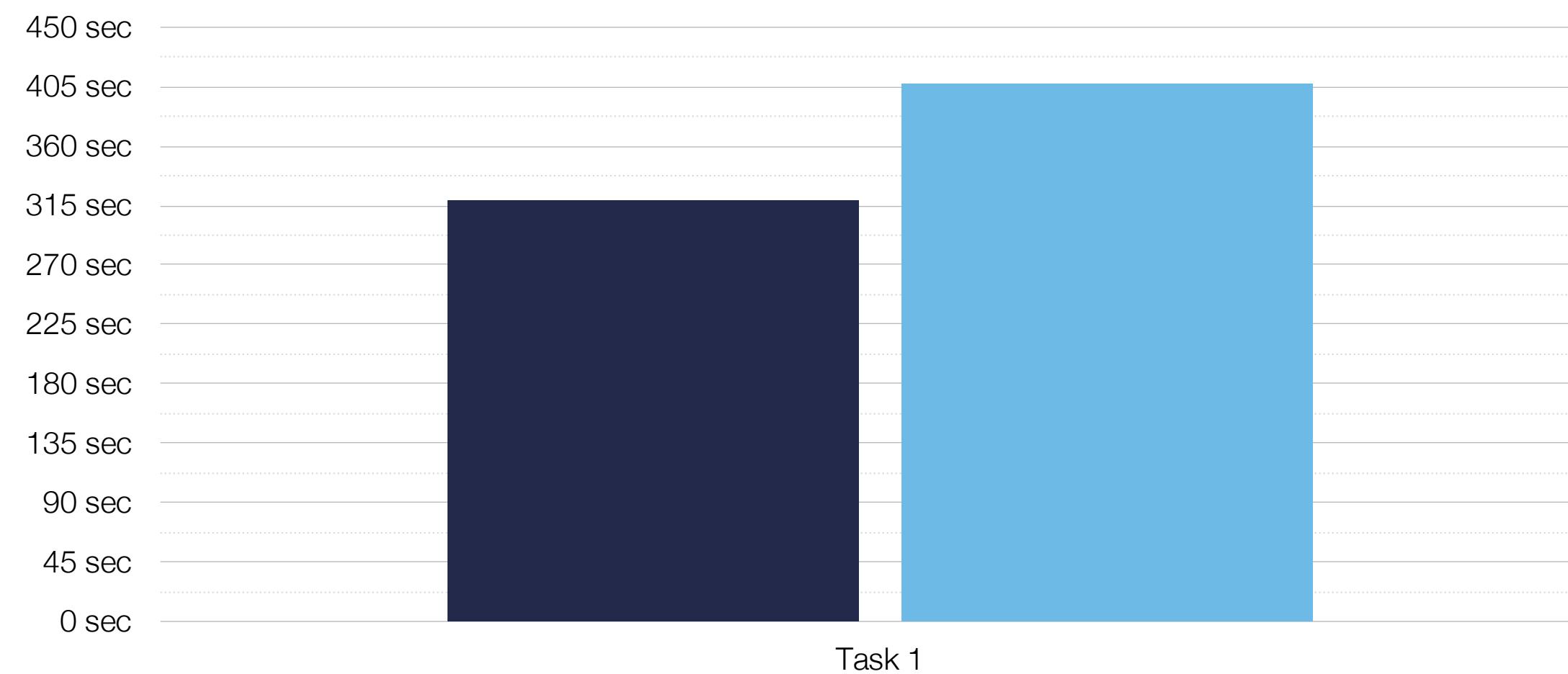
Task 1 - Status of the 2015 T1 tax return comparison - cont.

User Test 2 User Test 3

Average time on task

28%
↑

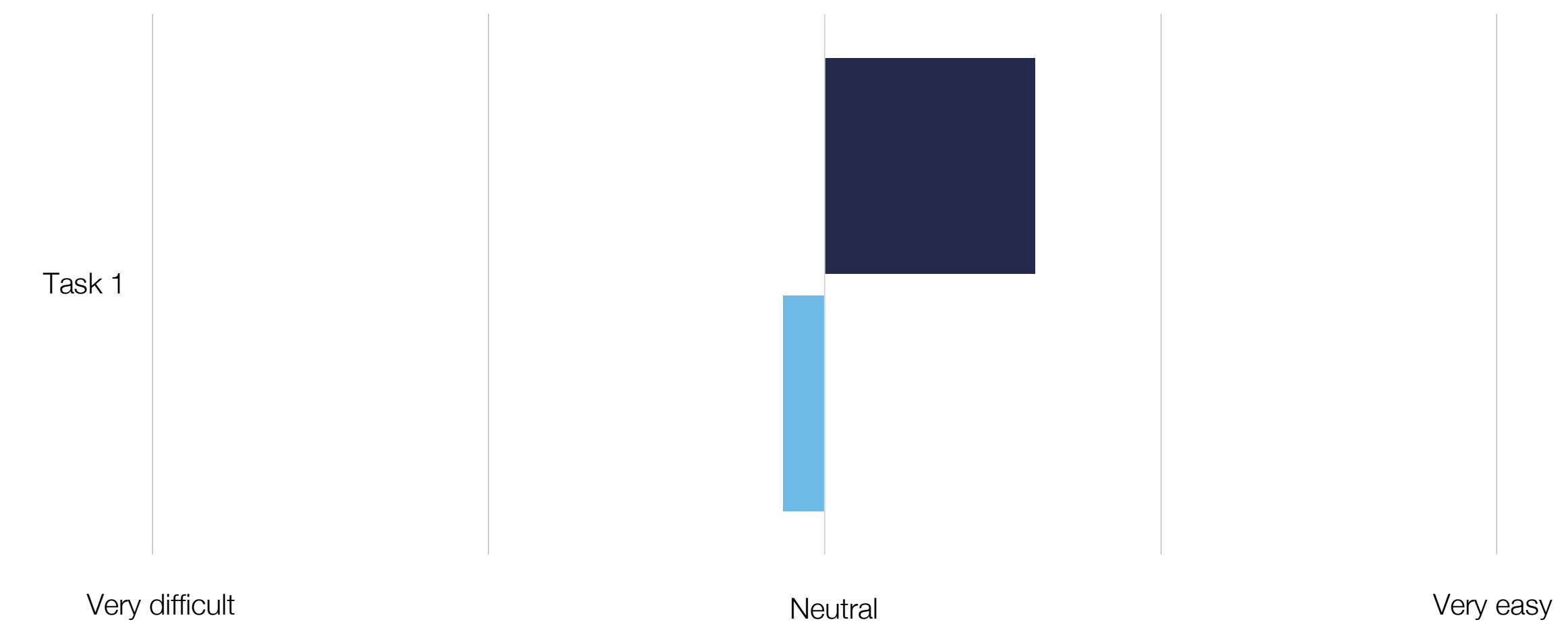
Increase in
time on task



Average task usability

120%
↓

Decrease in
ease of use



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

Observations

- ▶ The rationale for picking the items on the PT on the Overview page is unclear. Also, the label Active files is unclear.
- ▶ On mobile the responsive design doesn't help the visibility of the progress tracker, it's drawn into the rest of the content.

“It's not very straight forward”

“Where are my taxes? Why do I not see them? I would expect them to be under tax returns”

“Why it's all the way at the bottom, that is weird” (mobile)

“I'm looking at something like the status of your return”

“It's not active files because it's previous taxes”

Recommendations

- ▶ Define and strictly enforce a rationale and indicate it to the user with a label that uses user-centric, rather than CRA-centric, language (for example, use a label such as “Most recent interactions”), and
- ▶ Reconsider the location of the PT box so that it comes up first on the page (preferred). Alternatively, use a different visual coding to make it stand out (less preferred).

Task 2 - Status of Child Benefit Application

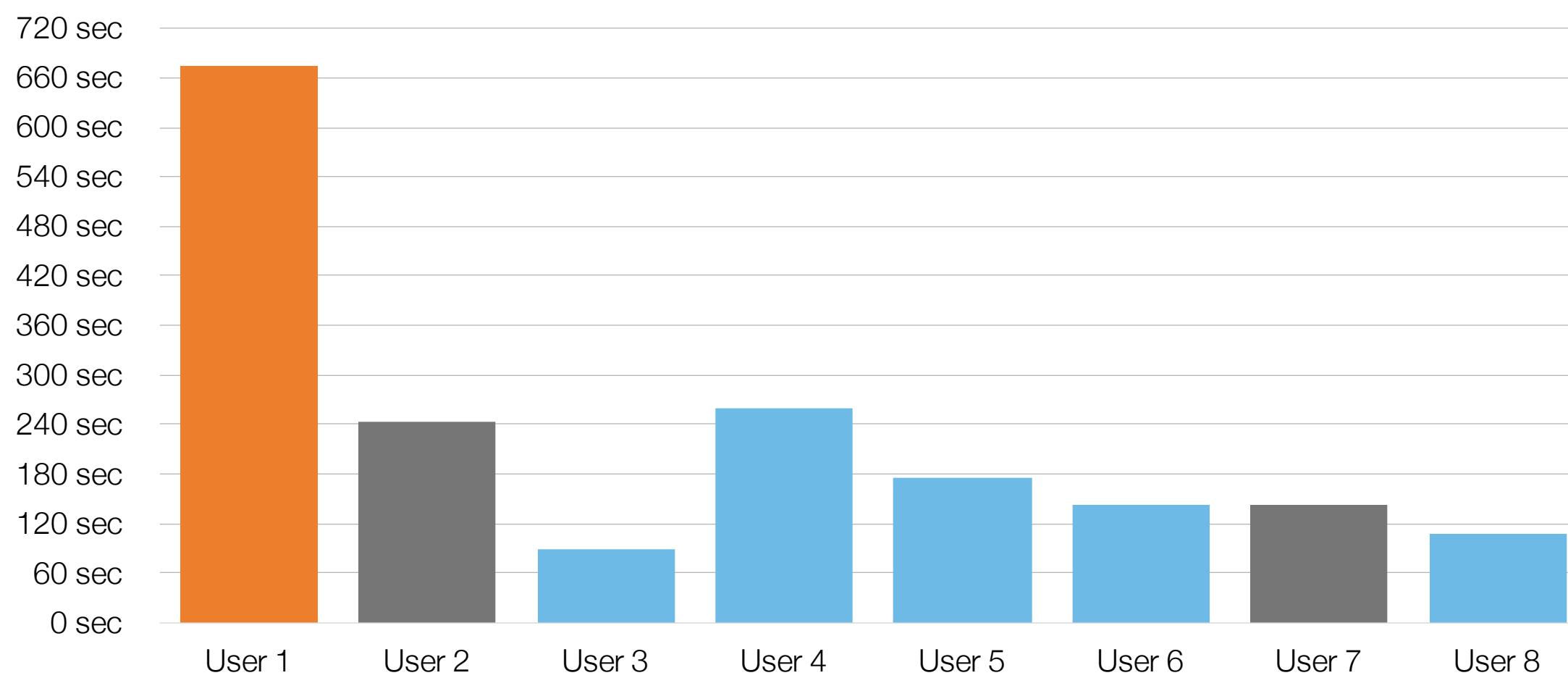
Success Minor Mistake Fail

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

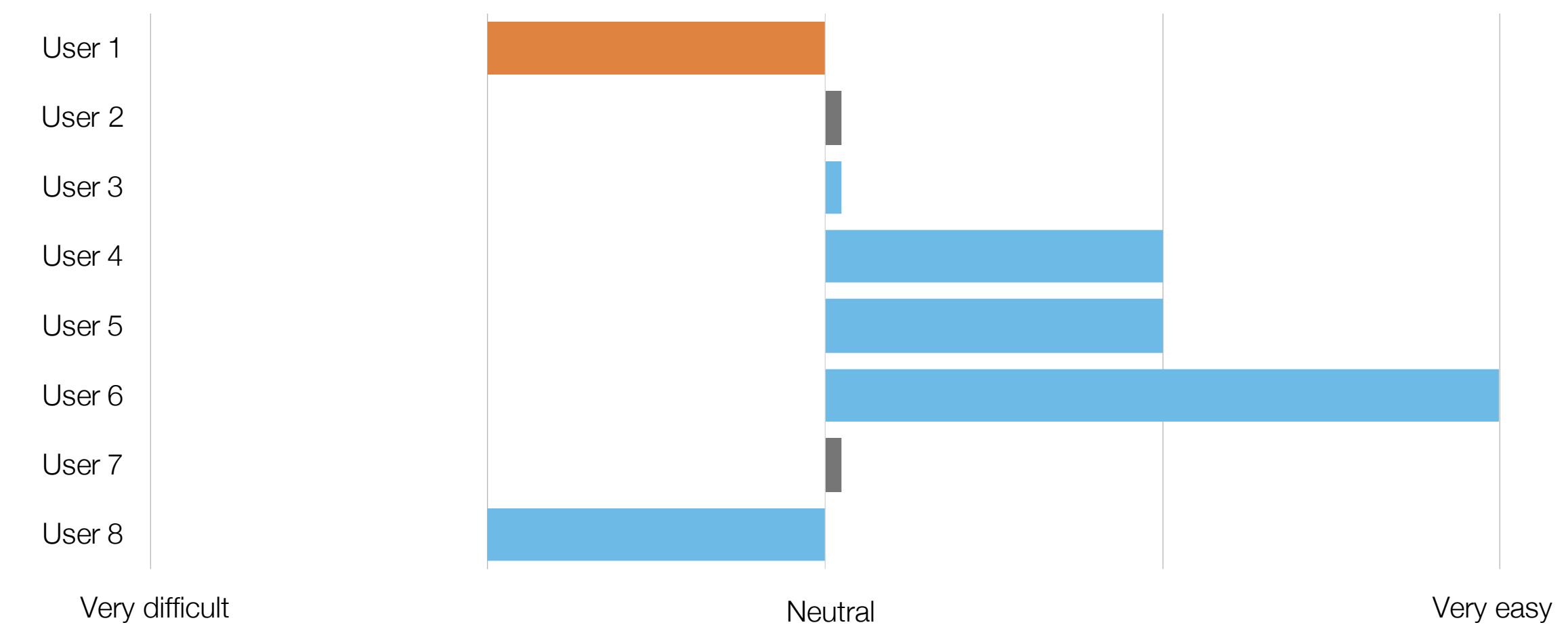
4/8

Users were
Successful

Time on task



Perceived ease of use



Task 2 - Status of Child Benefit Application comparison

User Test 2 User Test 3

Task completion

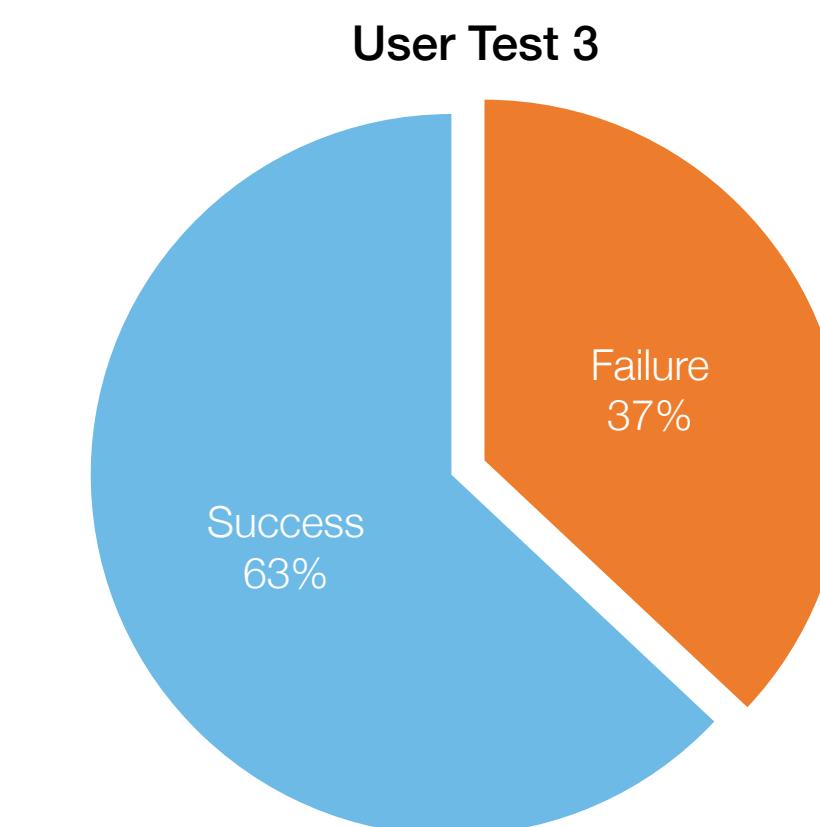
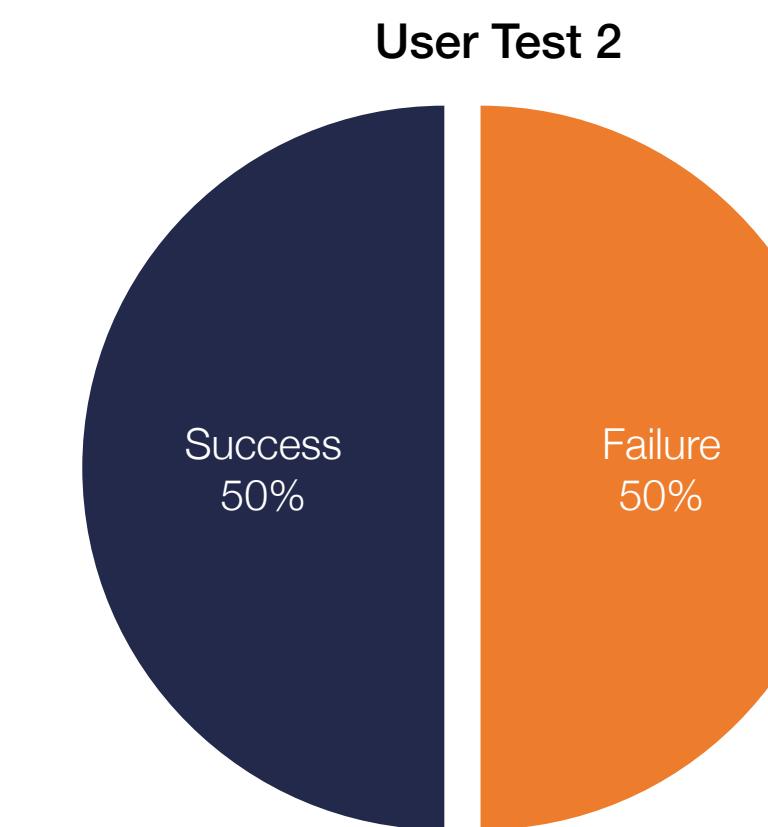
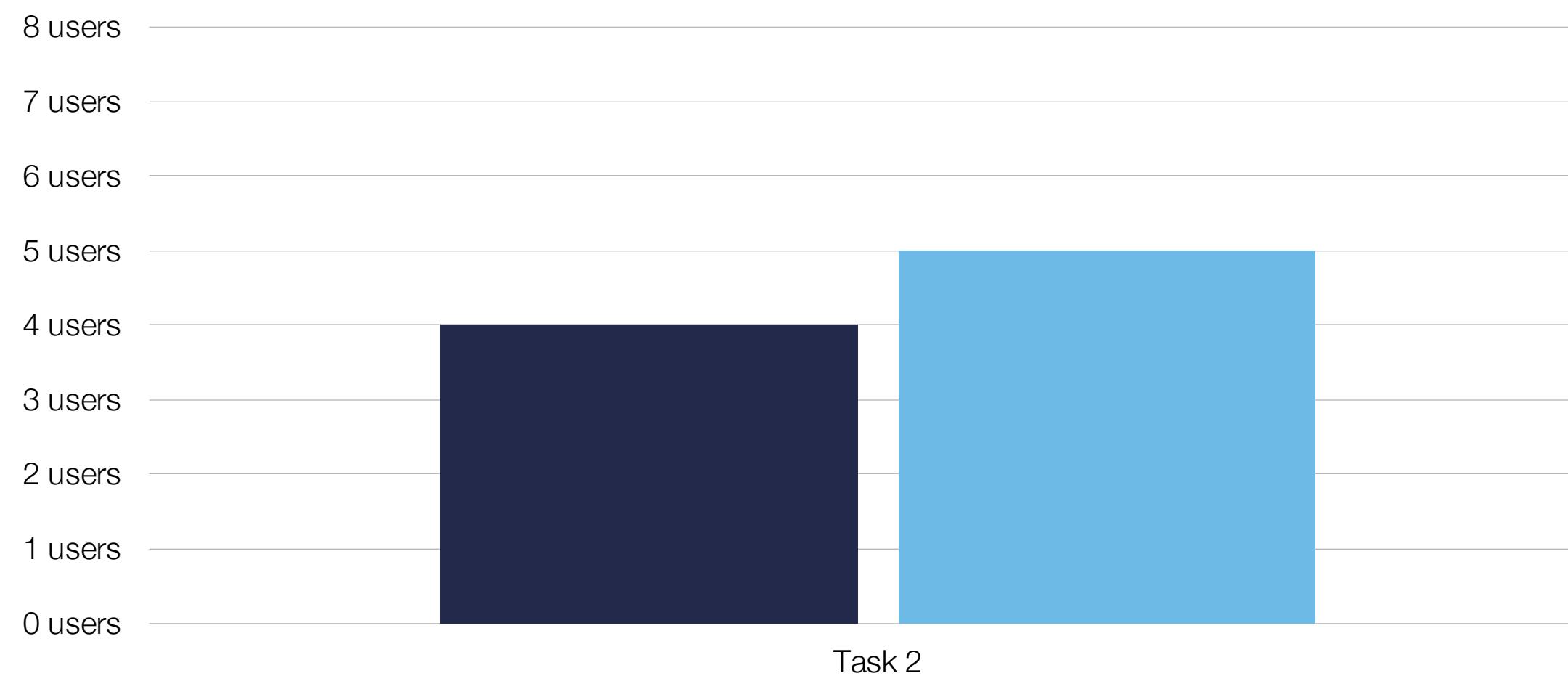
25%
↑

Increase in
task completion

Average success rate

25%
↑

Increase in
success rate



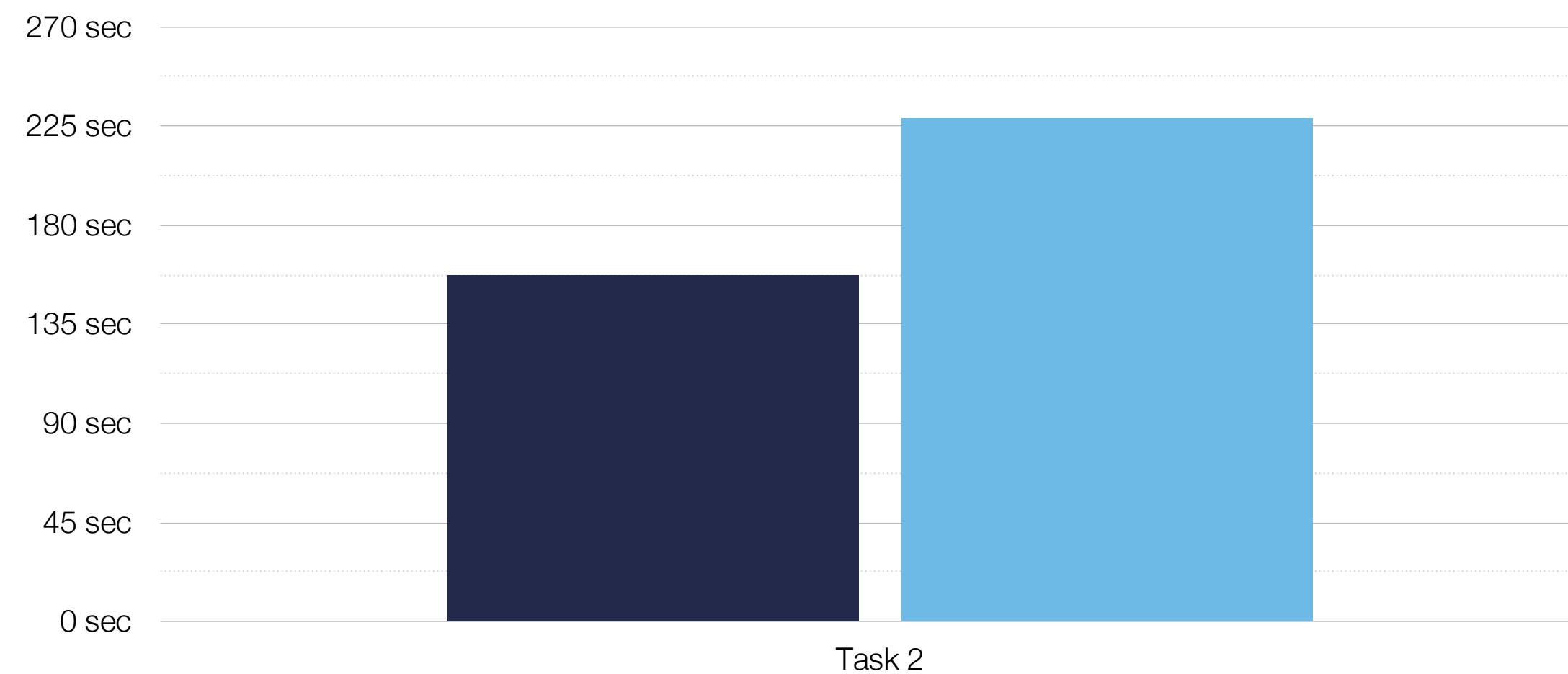
Task 2 - Status of Child Benefit Application comparison - cont.

User Test 2 User Test 3

Average time on task

45%
↑

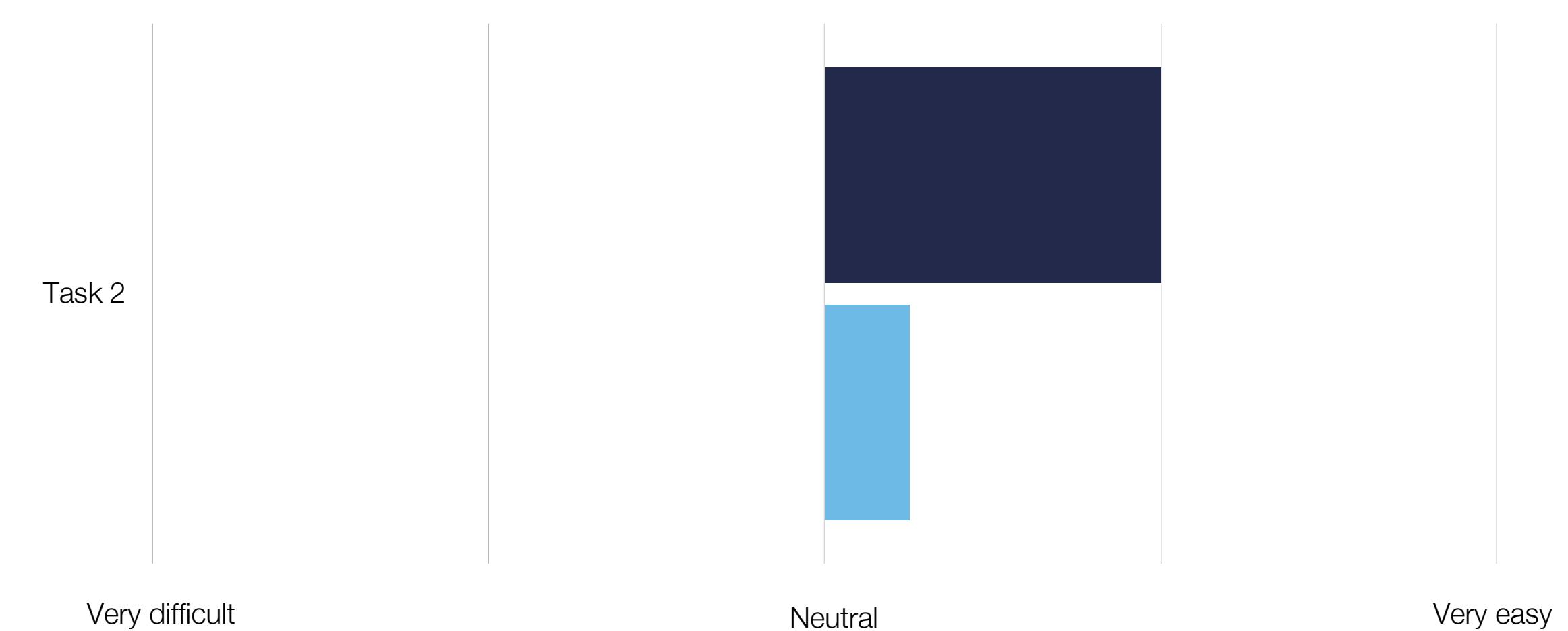
Increase in
time on task



Average task usability

75%
↓

Decrease in
ease of use



Task 2 - Status of Child Benefit Application - cont.

Observations

- ▶ As in the case of the 2 previous UT, most users go to the Benefits & credits section, either in the ribbon or in the section. It is unclear to them that it should be under PT even if it is displayed on the overview page.

“The link Active files, recently filled it should be there, the most common is under benefits”

“Don't know if I should look under Benefits & credits or PT, since I'm looking for the status of my file, I'll click on Active file” (Mobile)

Recommendations

- ▶ Provide a link to the details in the Benefits and credits table (on the overview page) and once the users access the Benefits and credits menu item in the ribbon.

Task 3 - Additional review required

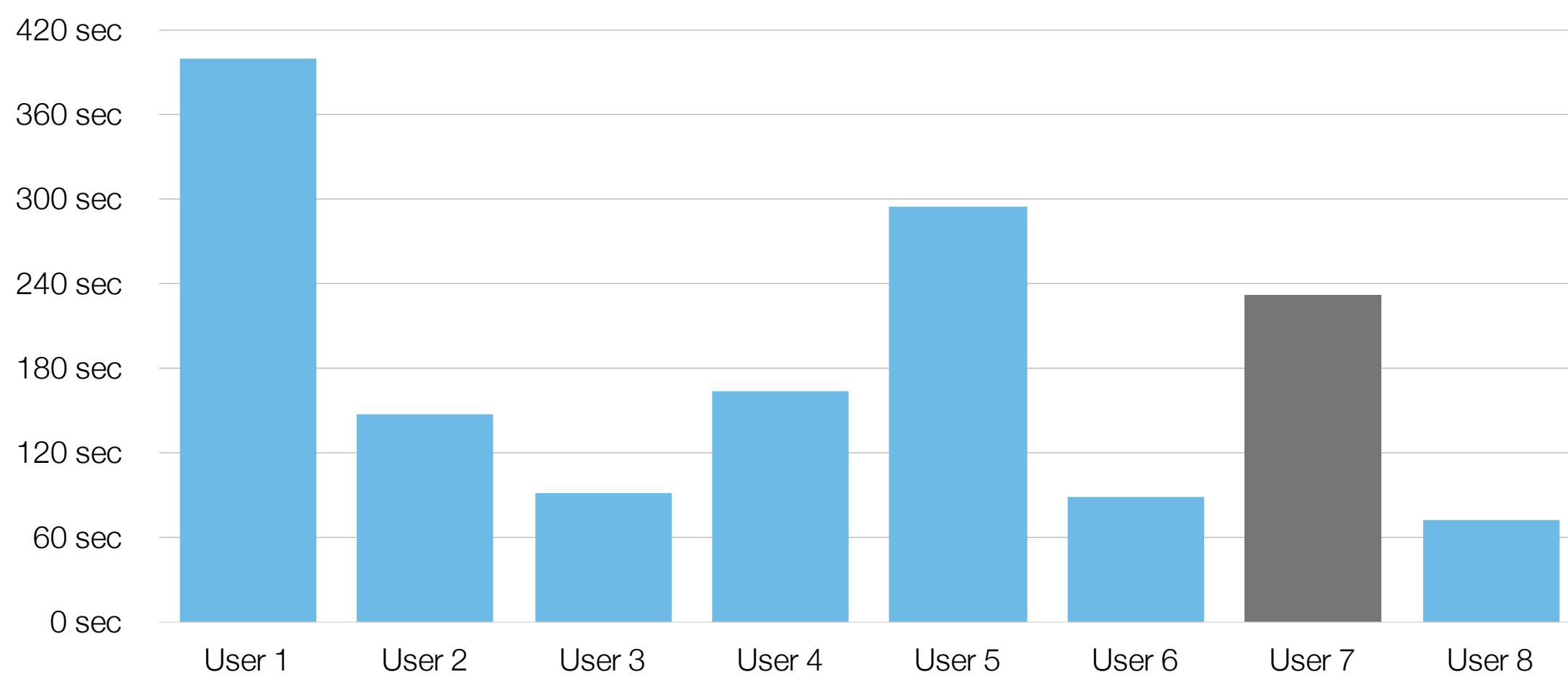
■ Success ■ Minor Mistake ■ Fail

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

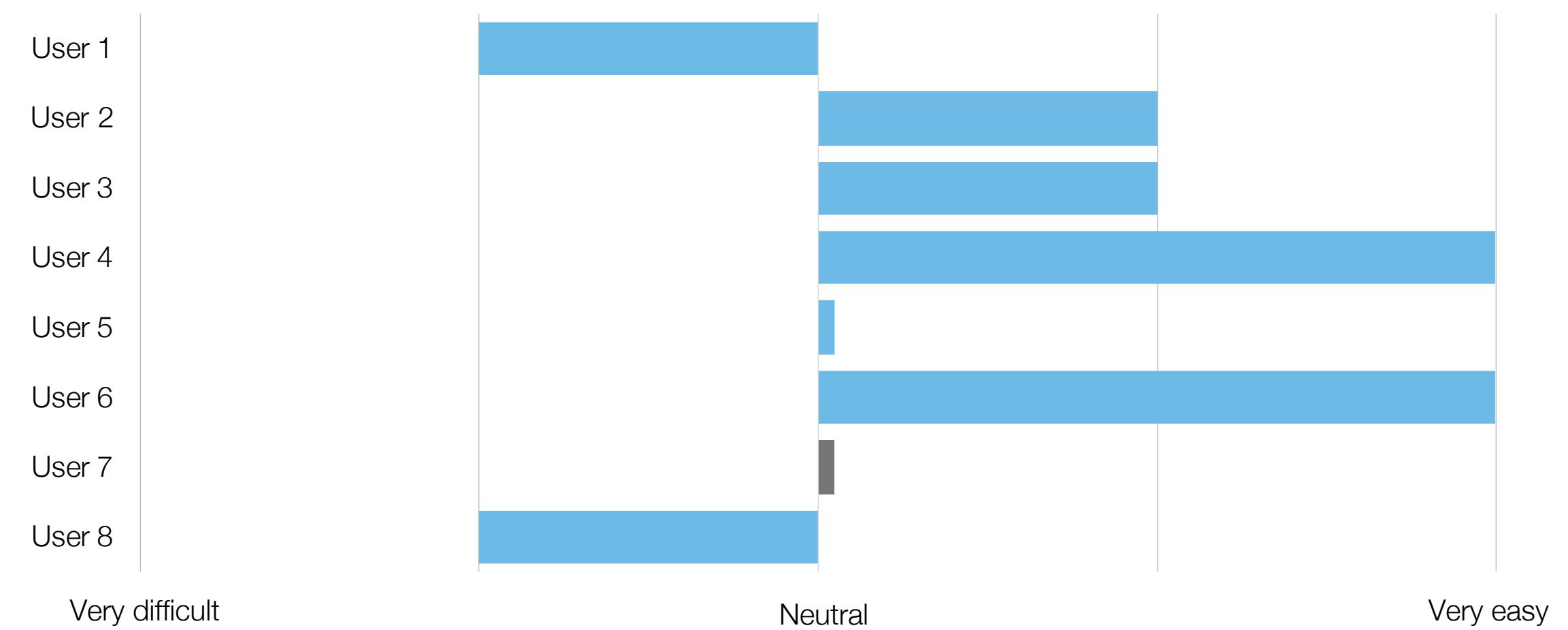
7/8

Users were
Successful

Time on task



Perceived ease of use



Task 3 - Additional review required comparison

User Test 2 User Test 3

Task completion

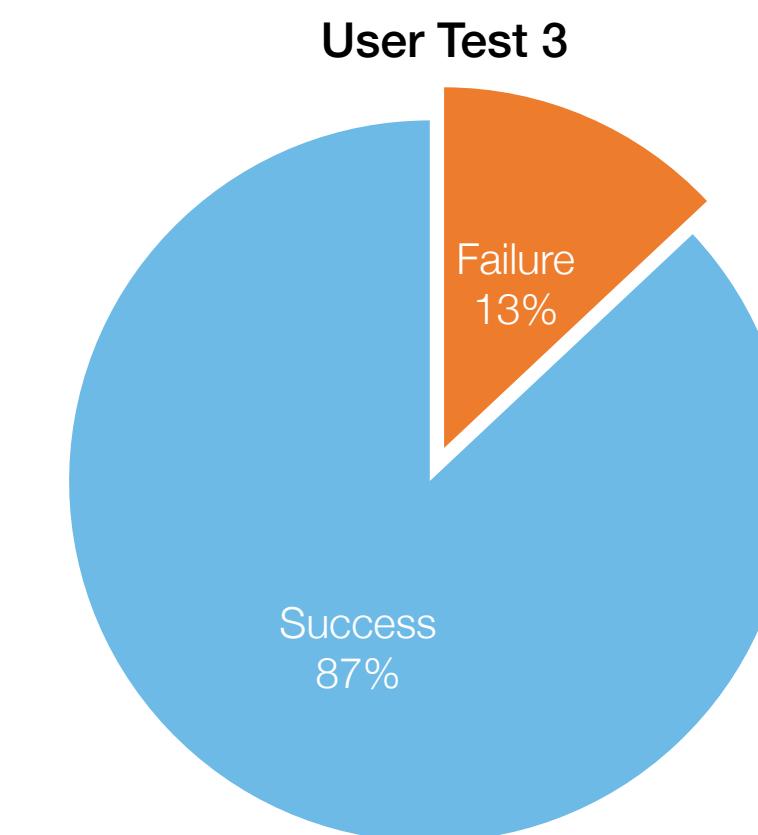
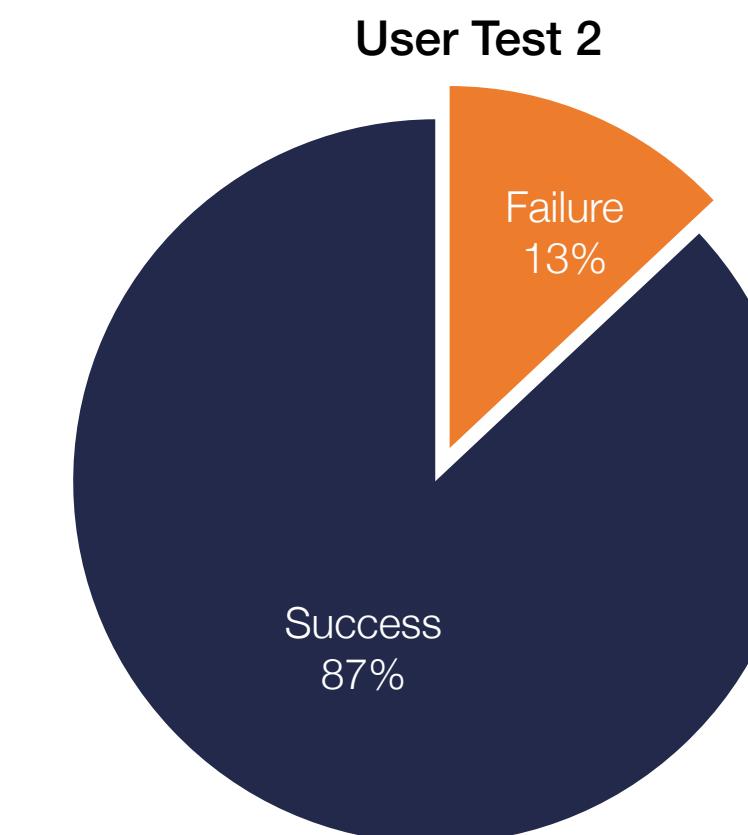
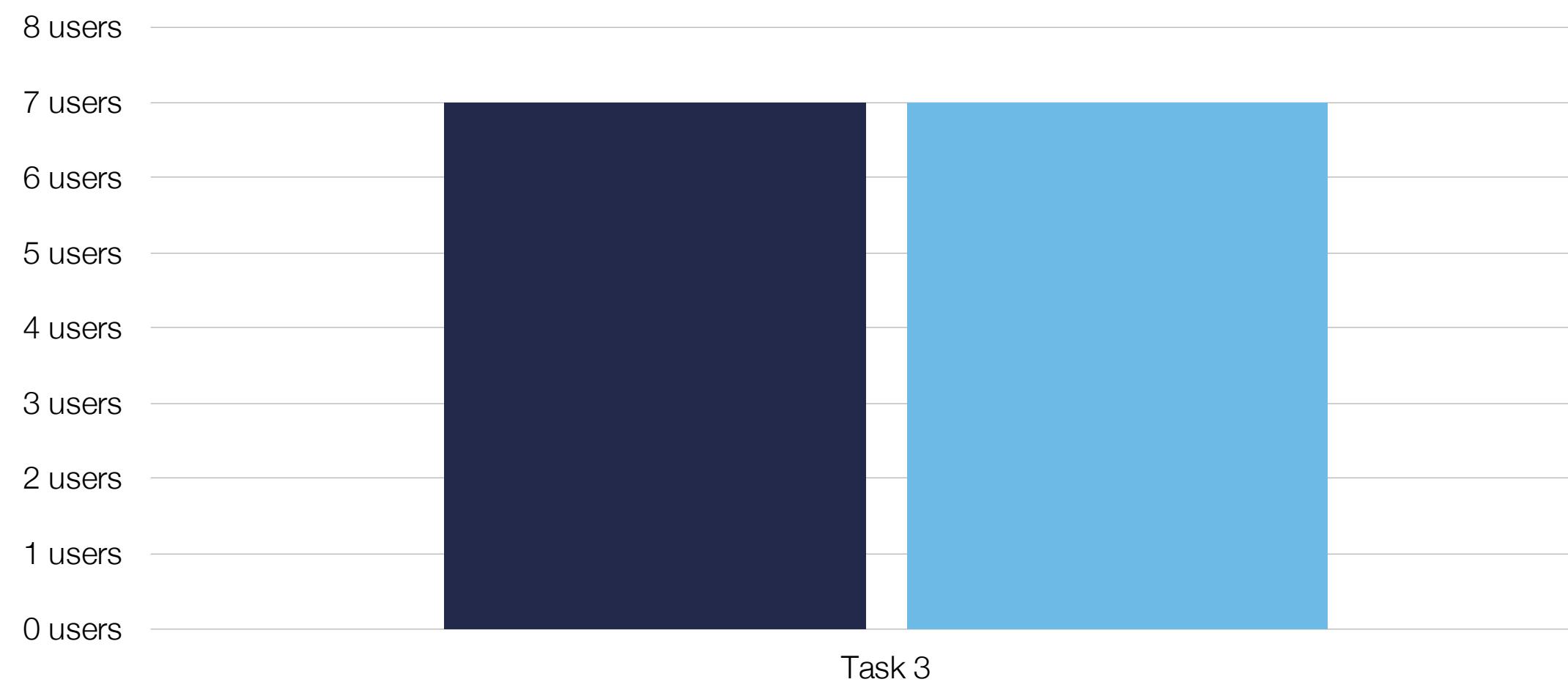
0%
↑

Decrease in
task completion

Average success rate

0%
↑

Decrease in
success rate



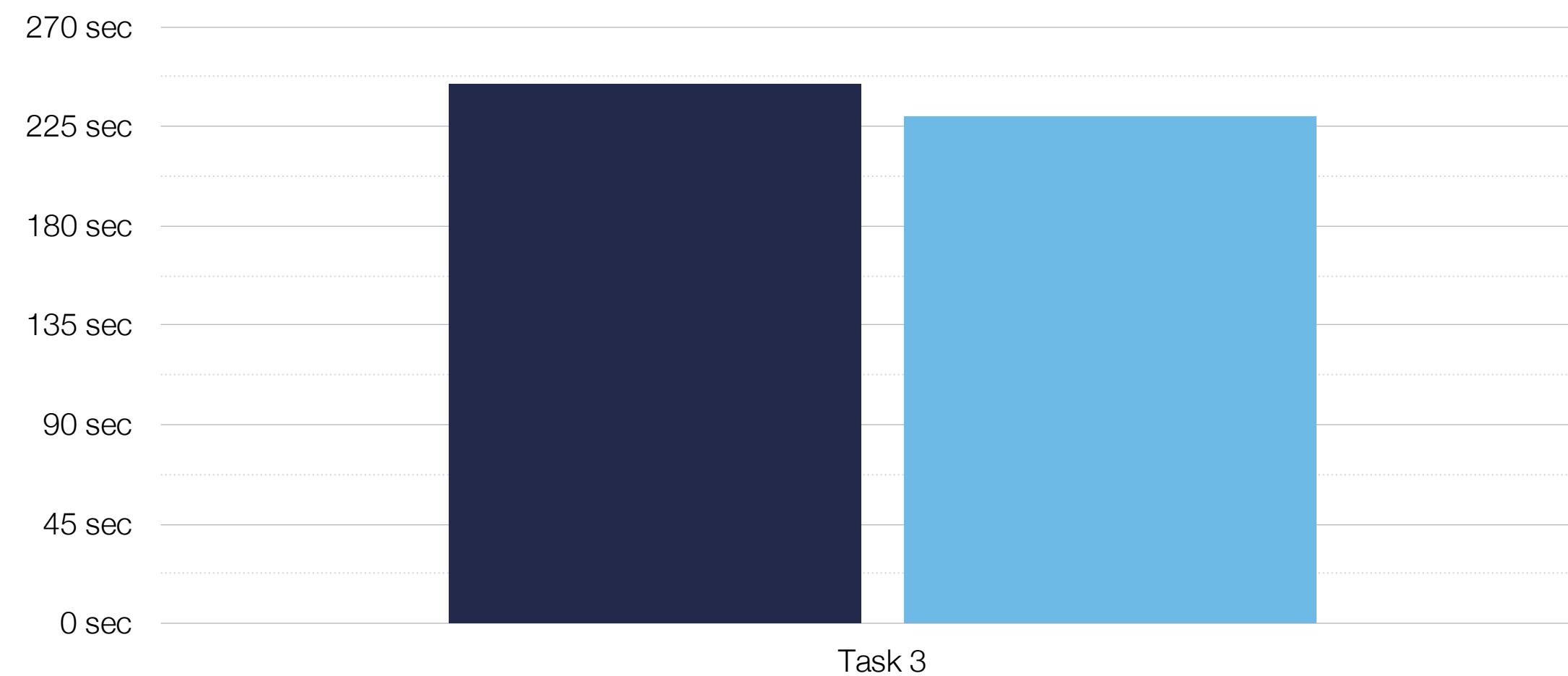
Task 3 - Additional review required comparison - cont.

User Test 2 User Test 3

Average time on task

23% ↓

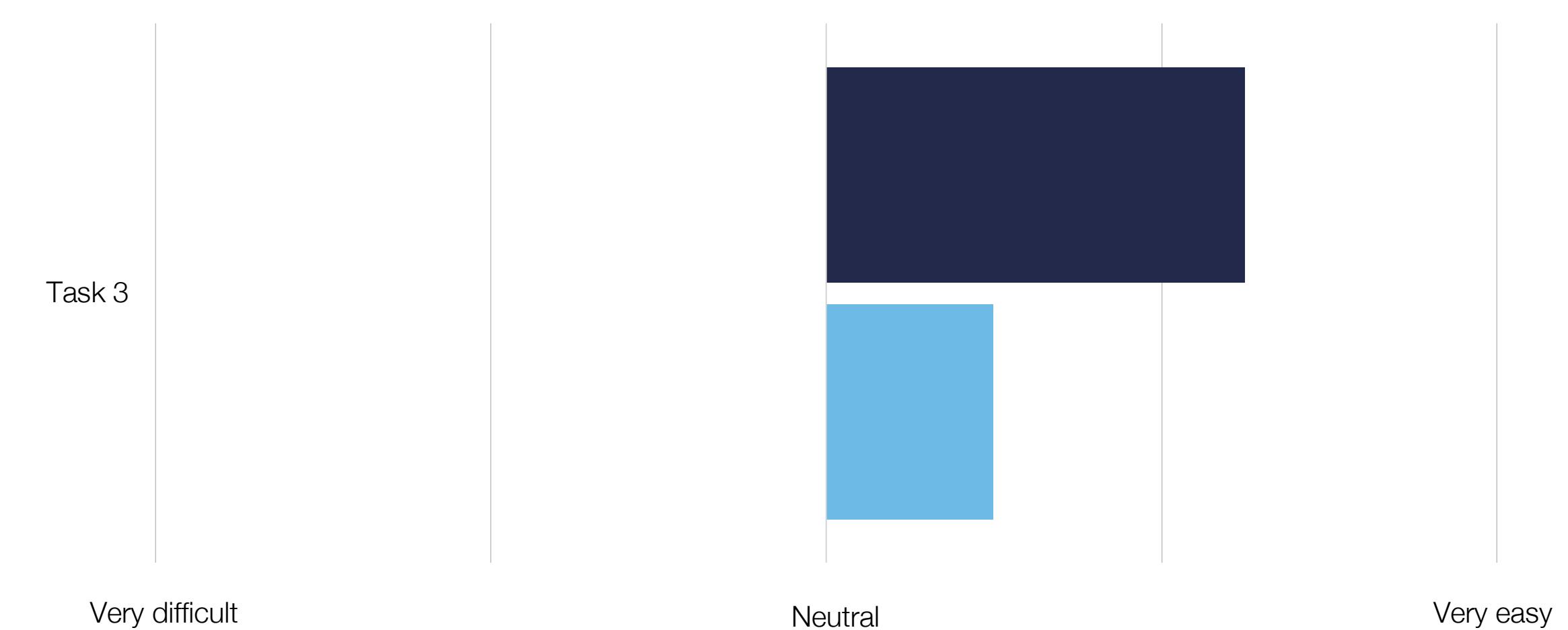
Decrease in
time on task



Average task usability

60% ↓

Decrease in
ease of use



Task 3 - Additional review required comparison - cont.

Observations

- ▶ Going to the mailbox is an unnecessary step.
- ▶ On the 2019 page, the target completion date was not there for the first user (mobile).
- ▶ Users do not understand what “CRA review required” implies, nor why this does not show on the PT box on the Overview page.

“I'm expecting the letter when I click on the link (online mail).”

“I'm guessing it's in the progress Tracker, because of the previous tasks.”

“A mailbox should be my mail, a link doesn't represent a mailbox just a new page” (Mobile)

“Oops where was I?” (because of the back link)

“Why didn't they tell me that my action is required?”

Recommendations

- ▶ Bring the user directly to the letter rather than to the mail page.
- ▶ The link label should carry out the information that an action is needed by them. See the recommendation in the Section Propose Design – First Cut.

Task 4 - Complete list of ongoing files

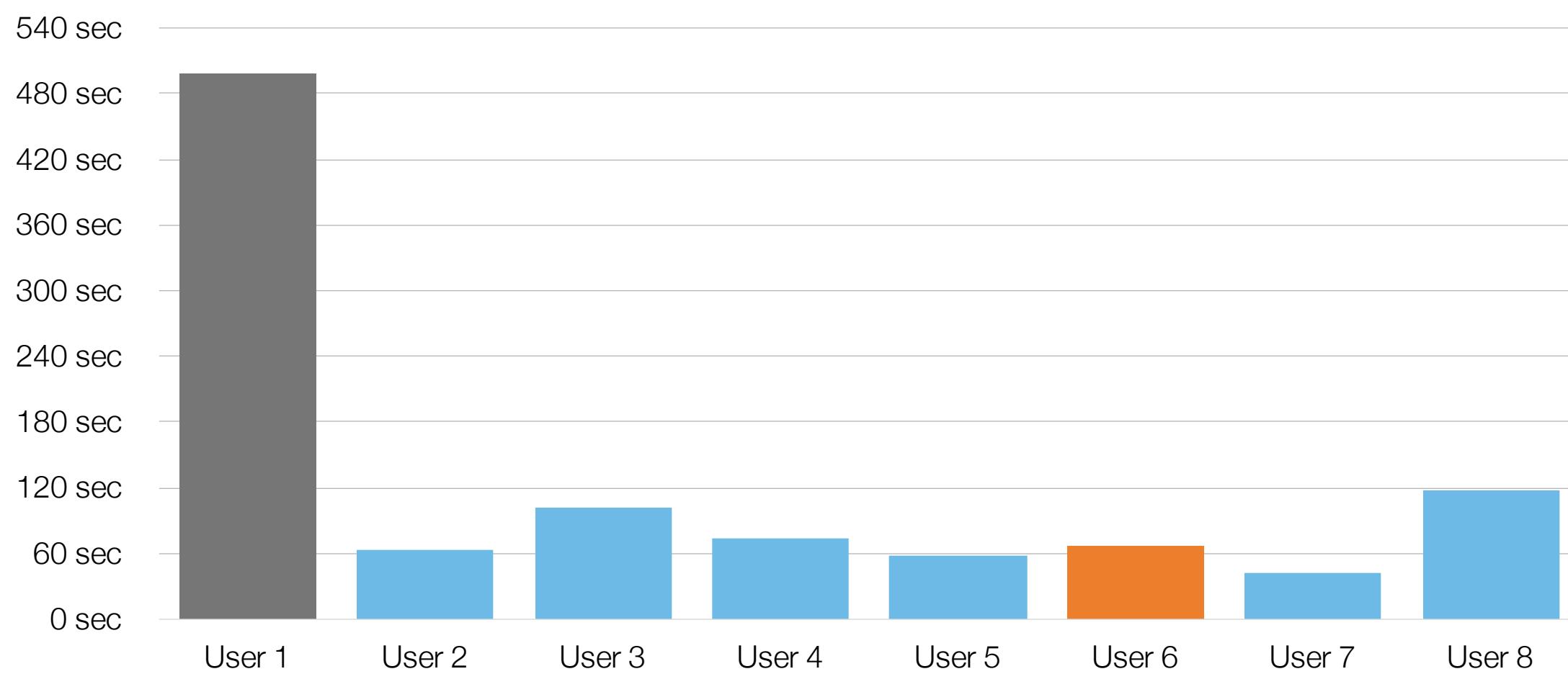
■ Success ■ Minor Mistake ■ Fail

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

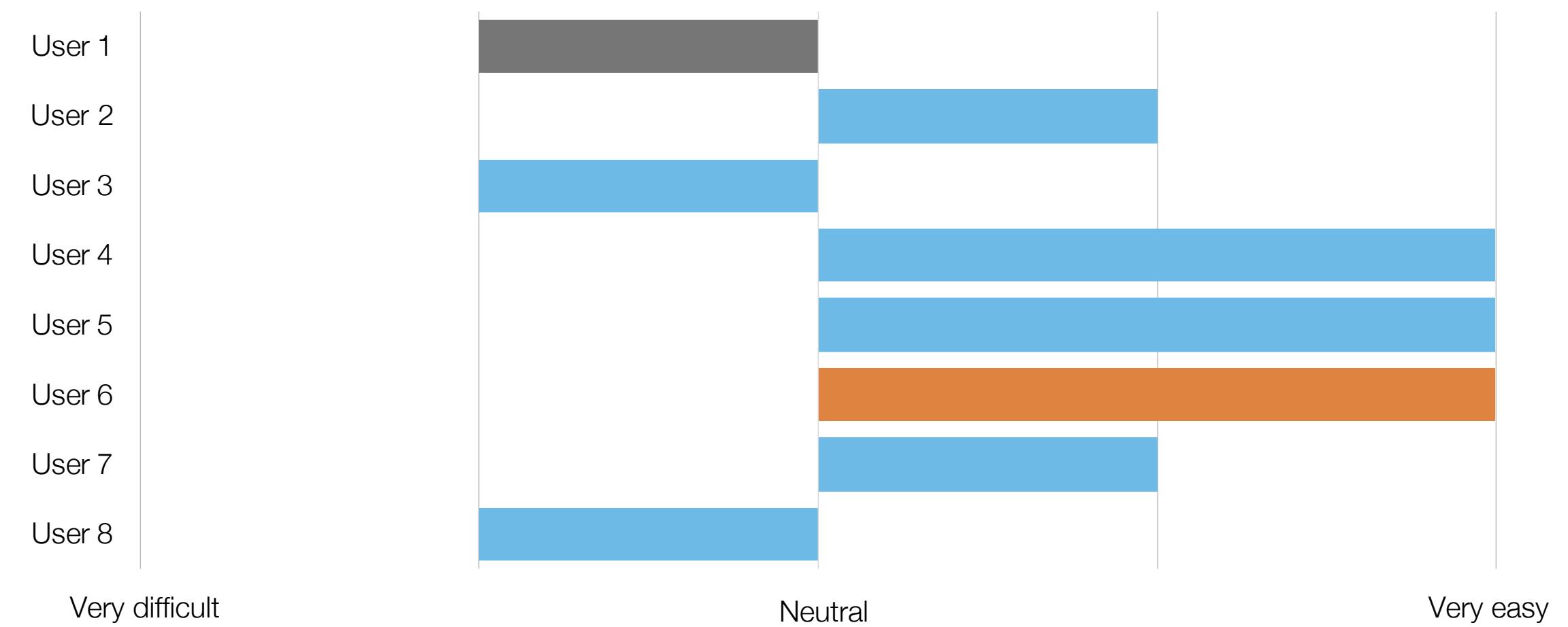
6/8

Users were
Successful

Time on task



Perceived ease of use



Task 4 - Complete list of ongoing files comparison

User Test 2 User Test 3

Task completion

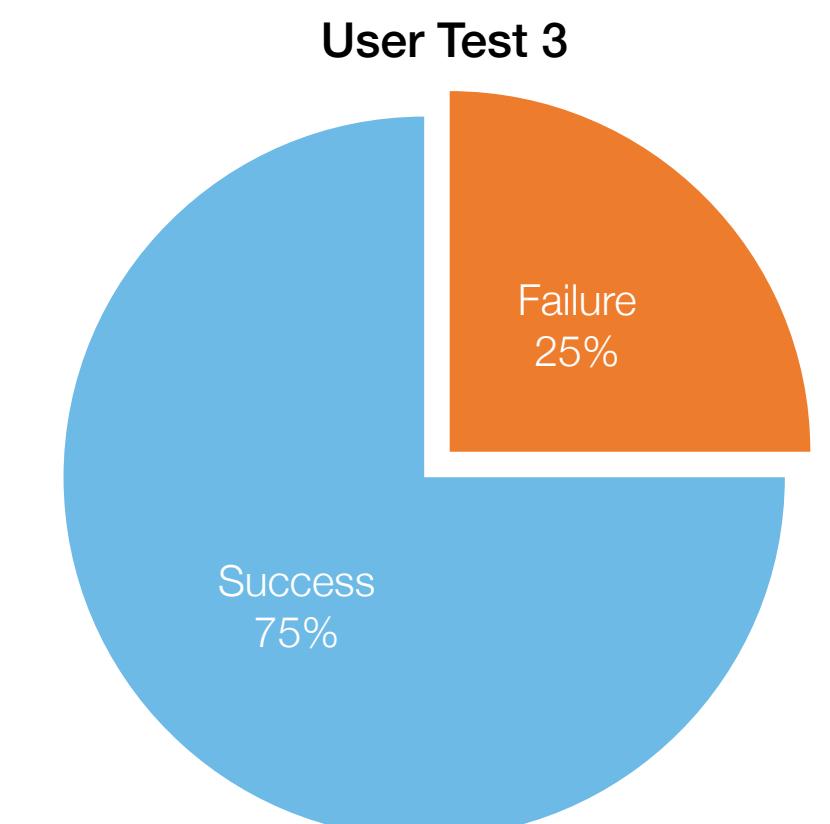
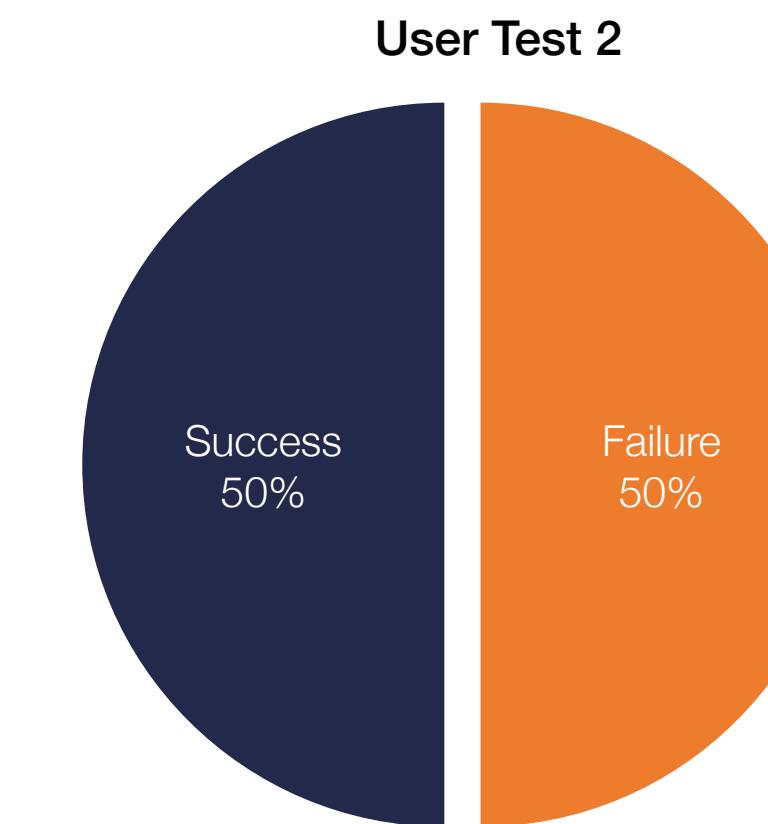
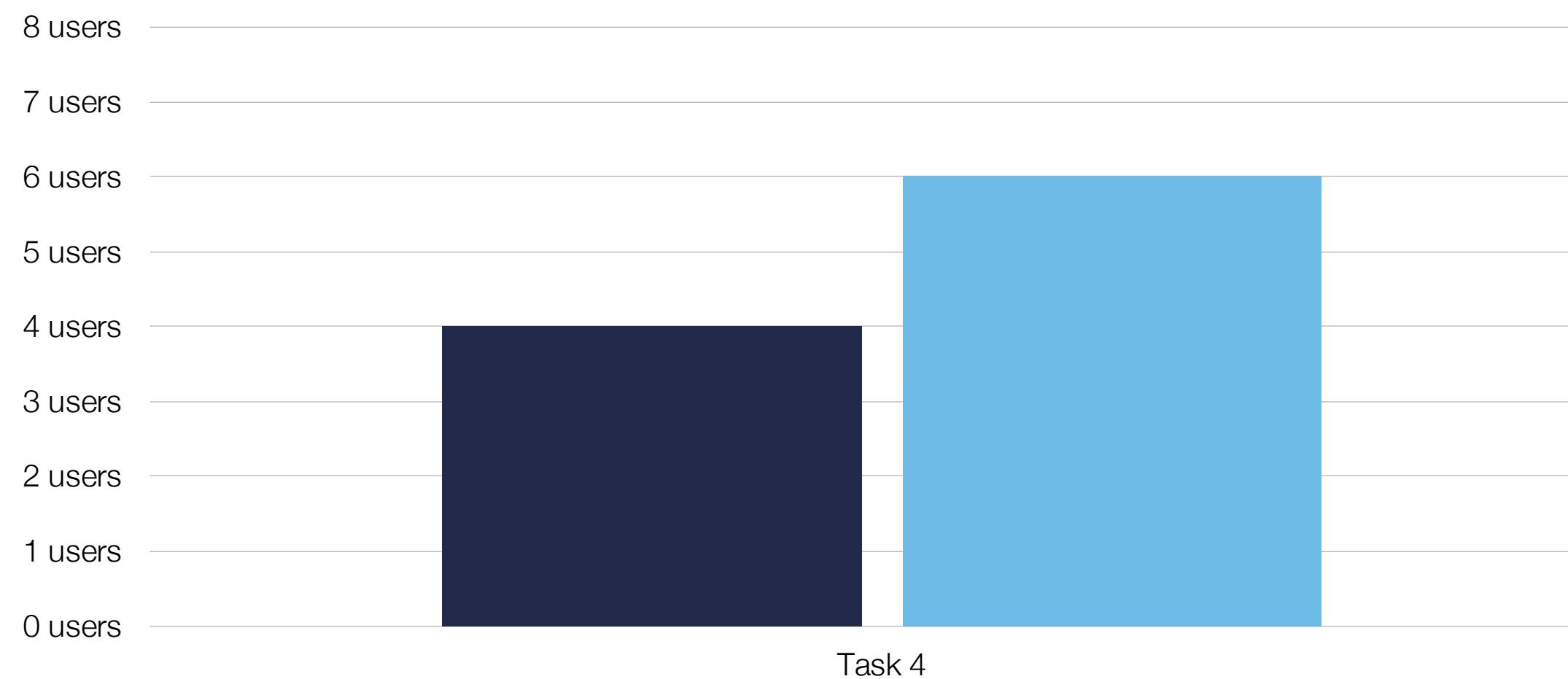
50%
↑

Increase in
task completion

Average success rate

50%
↑

Increase in
success rate



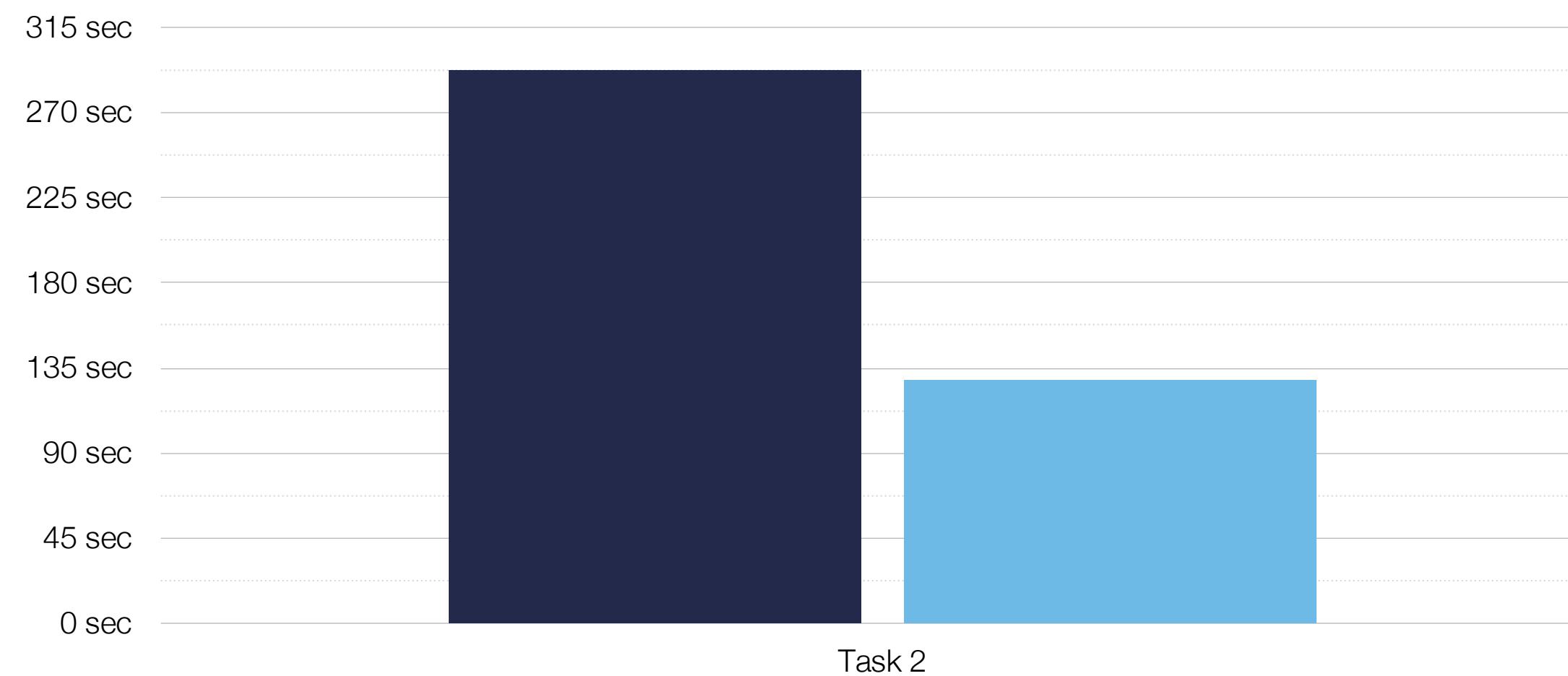
Task 4 - Complete list of ongoing files comparison - cont.

User Test 2 User Test 3

Average time on task

56% ↓

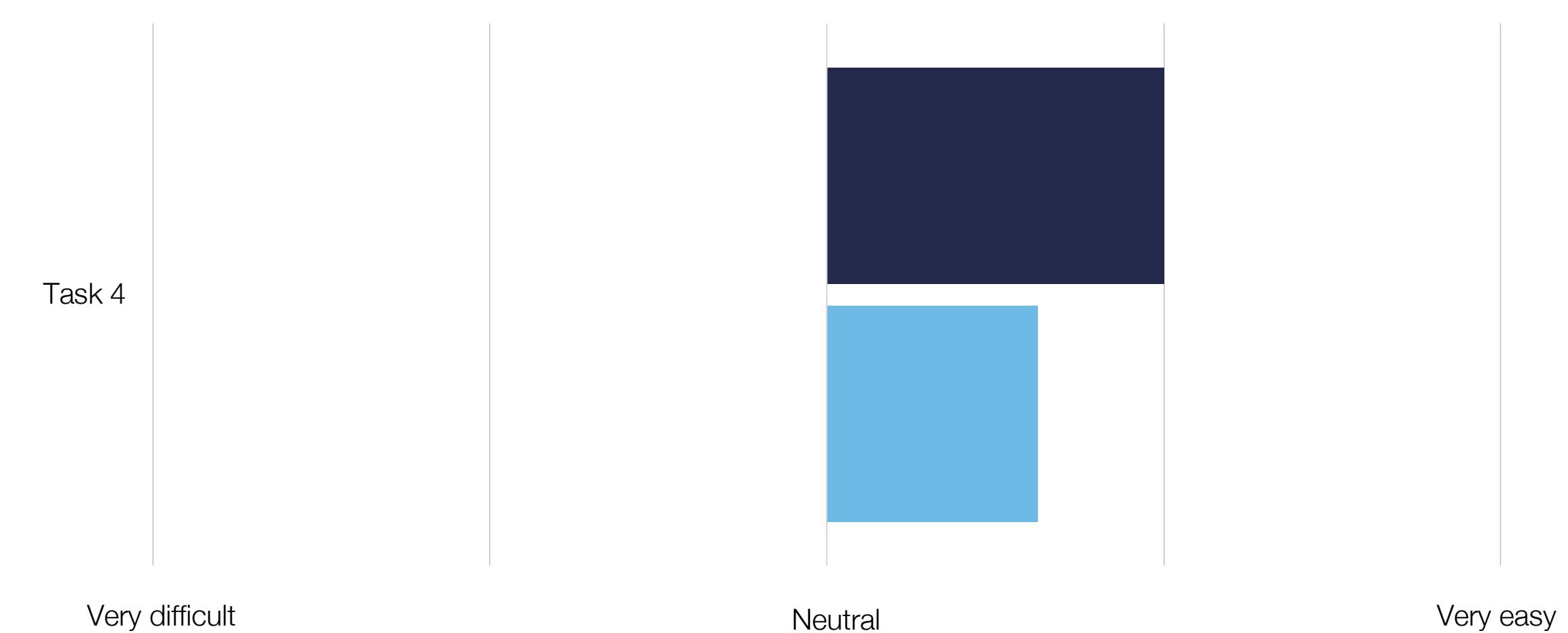
Decrease in
time on task



Average task usability

37% ↓

Decrease in
ease of use



Task 4 - Complete list of ongoing files - cont.

Observations

- ▶ The “Active files” link prevents the participants from understanding that on the overview page it’s just a snapshot of the PT, 3 over 6 files. Also the label “Active files” is misleading as it leads to files that are no longer active, and it does not inform the user that it only refers to files that are only 30 days old or less.

“There are not enough details.“

“Now I know about the “active files” link, all the info is there.”

“All my recent dealings the PT shows my recent dealings,
I'm wondering if it's updated
because I don't see the 2015 we were speaking earlier (on
the overview page)”

“The PT is frustrating, I would like to have access from the
tab on the top.”

Recommendations

- ▶ Put a link “Show files for the last 30 days” after the label “3 out of 6 files” would help users understand that further down more files would be shown.

Task 5 - 2018 Tax Return Details

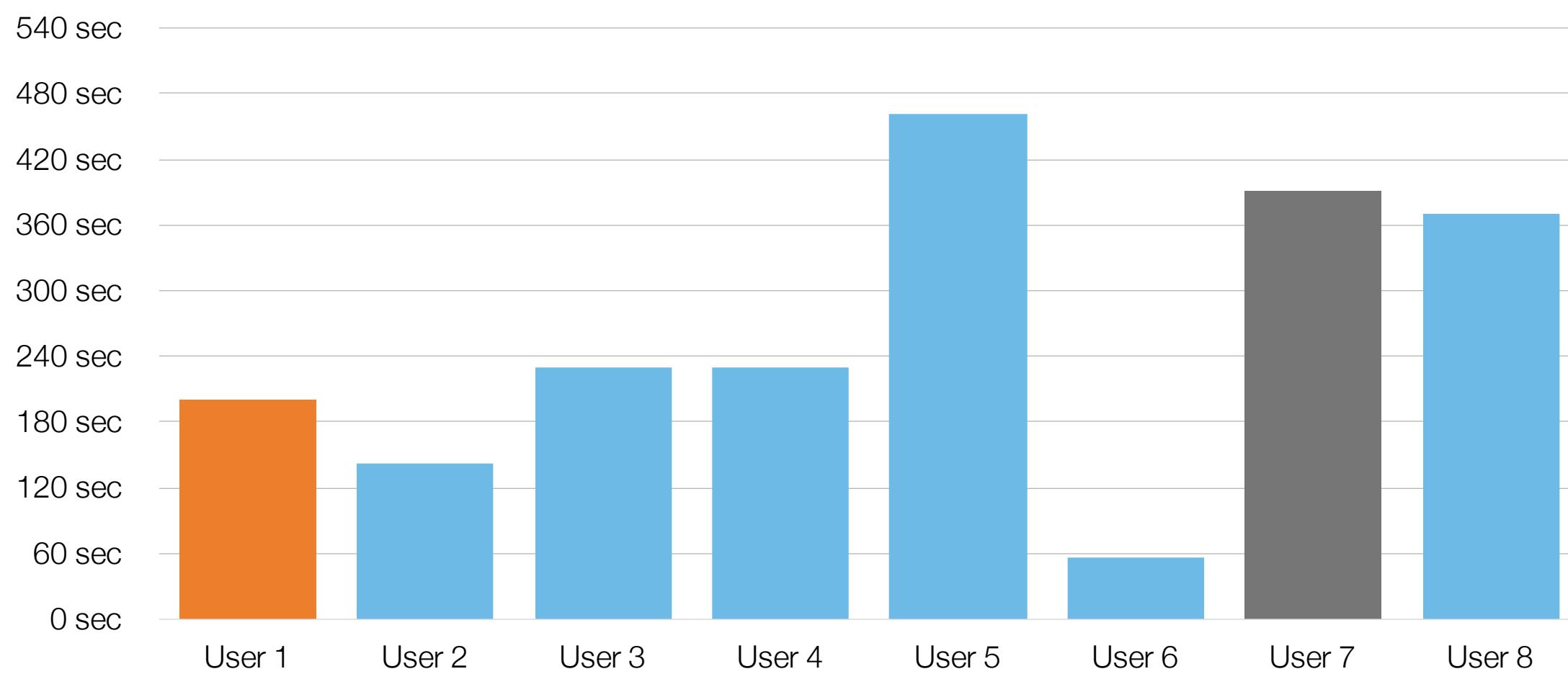
■ Success ■ Minor Mistake ■ Fail

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

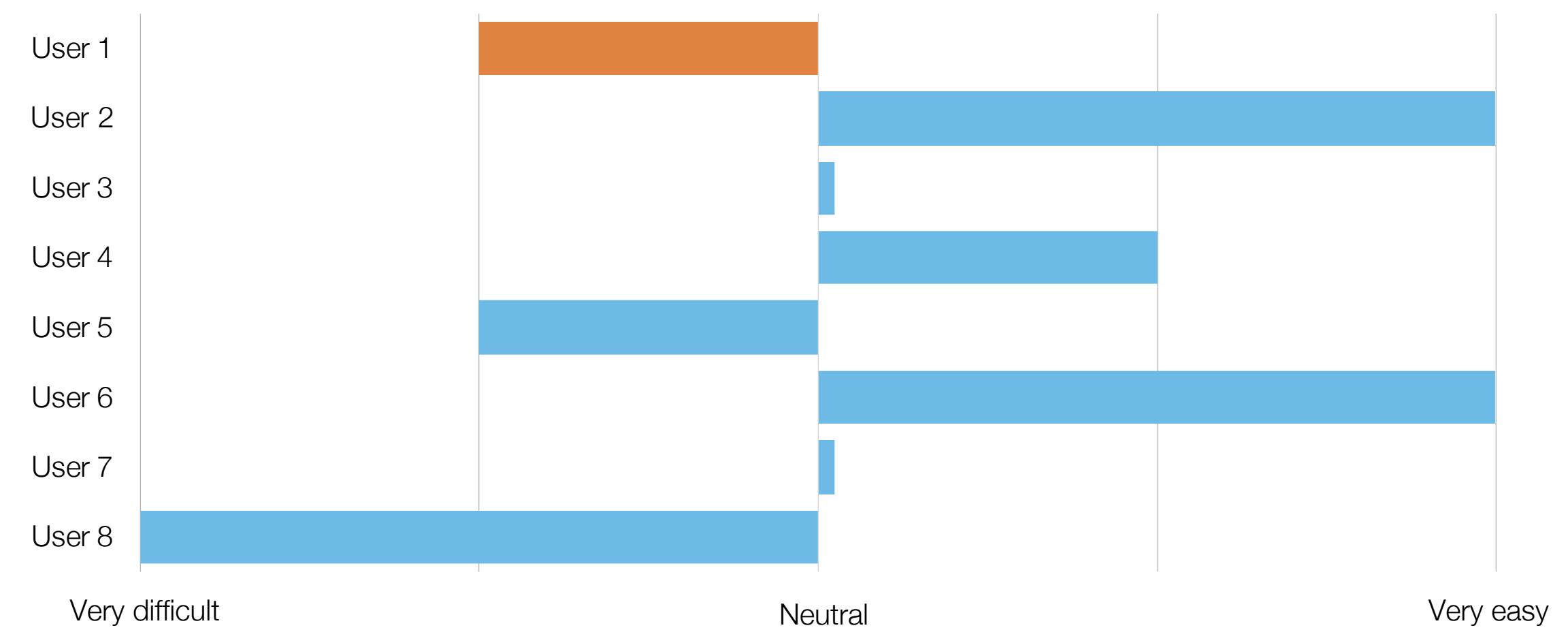
6/8

Users were
Successful

Time on task



Perceived ease of use



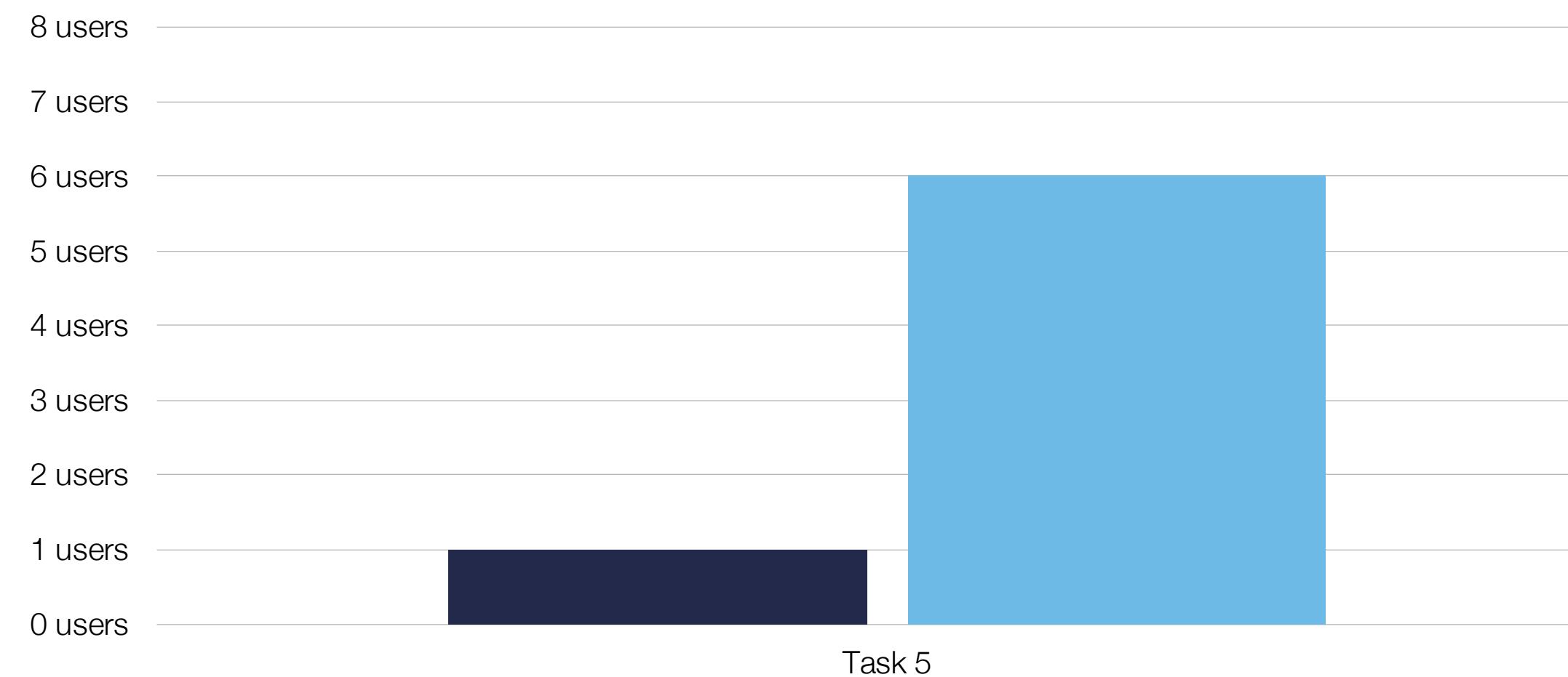
Task 5 - 2018 Tax Return Details comparison

User Test 2 User Test 3

Task completion

500%
↑

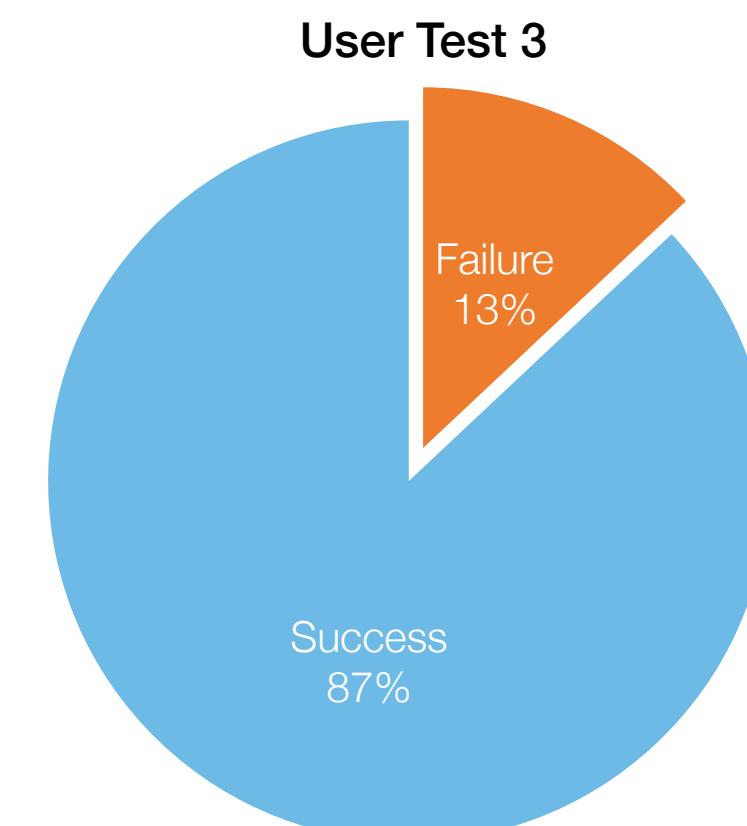
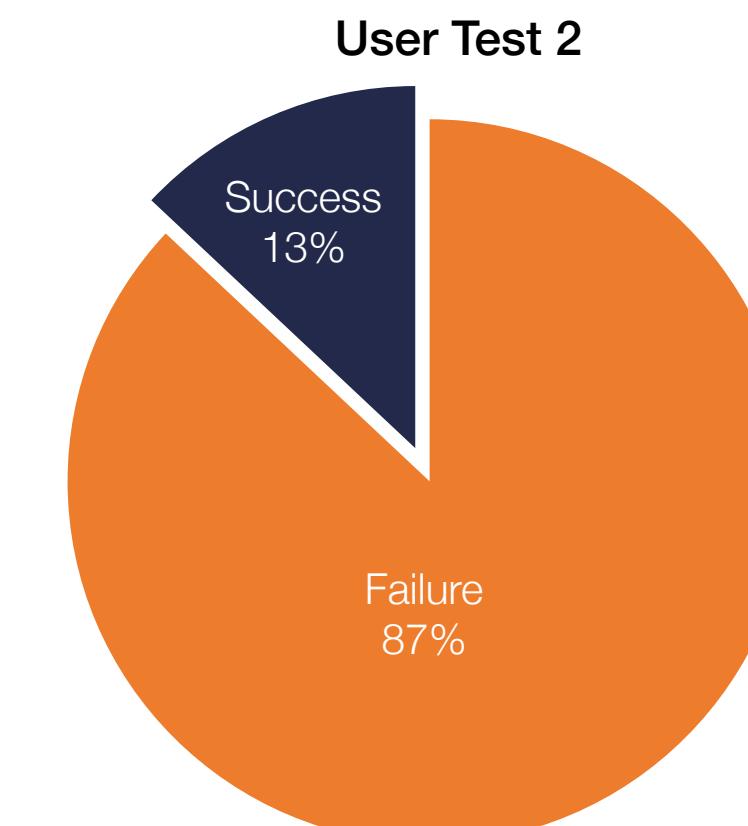
Increase in
task completion



Average success rate

500%
↑

Increase in
success rate



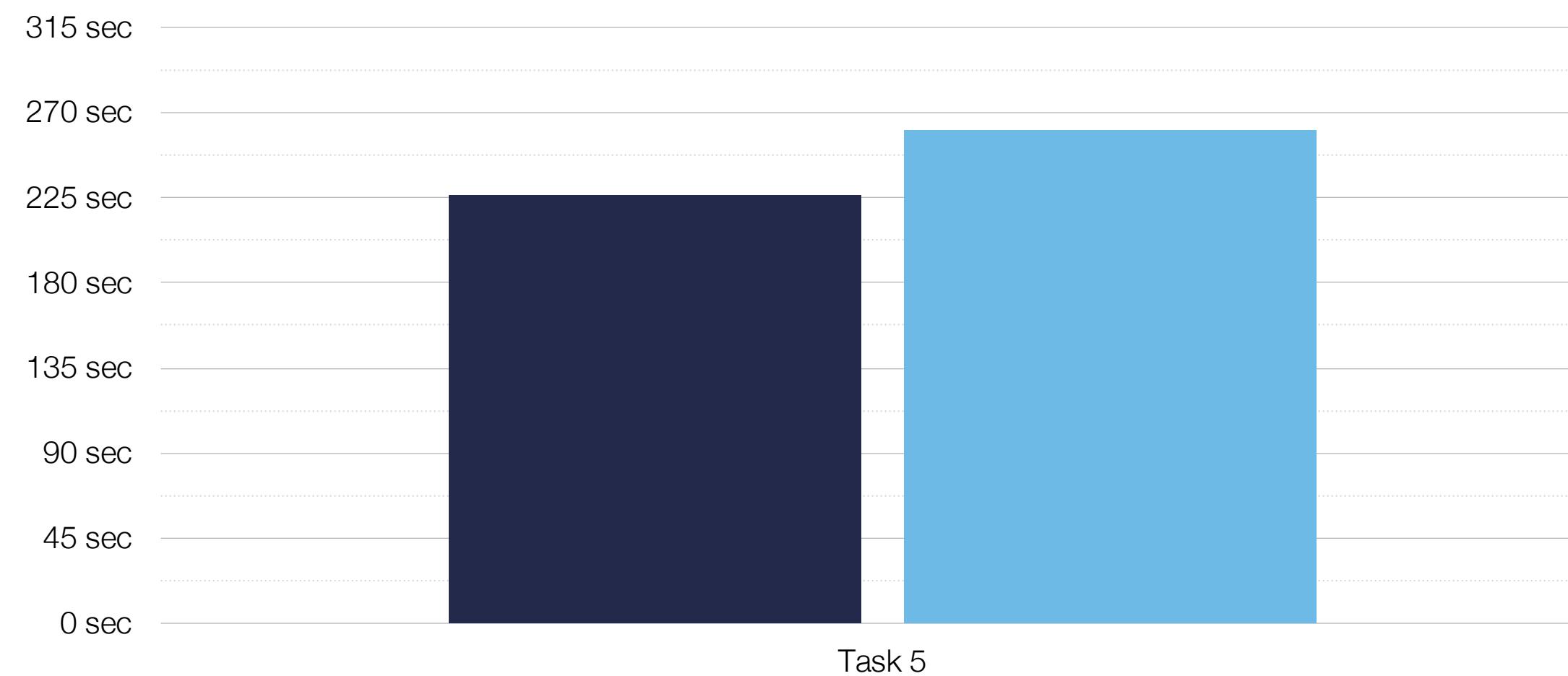
Task 5 - 2018 Tax Return Details comparison - cont.

User Test 2 User Test 3

Average time on task

15%
↑

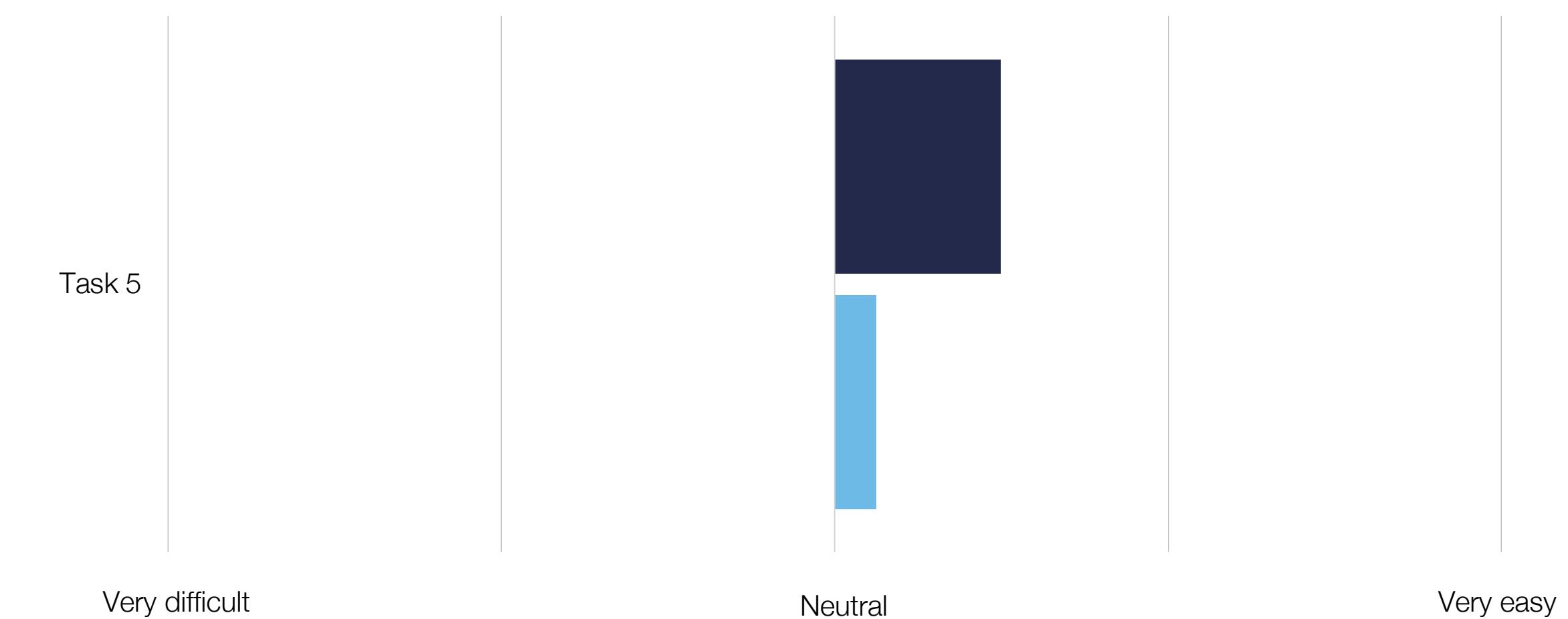
Increase in
time on task



Average task usability

75%
↓

Decrease in
ease of use



Task 5 - 2018 Tax Return Details - cont.

Observations

- ▶ Most of the challenges faced by the users were related to limitations in the prototypes or in the instructions. For example:
 - ▶ The breadcrumb does not work as it should.
 - ▶ Most users consider that all the information about the request information would be included in the letter and did not go through the details page where they could see the information about the requested documents. The objective of this question should perhaps be: are they using or not the PT to access the information?
 - ▶ At times, too much information is offered, for example for the hyperlink “Specialized processing”. Participants are overwhelmed by all the content, they don’t read all, they scroll up and down. Recommendation: the action to be taken by the user should be highlighted, the status should be shown differently and ancillary information should be hidden.

“How that happened, that is not where I came from. This page looks like the right place, but I don't know how I am supposed to find that.”

Recommendations

- ▶ The dates and read/unread status of messages should be coherent with the instructions.
- ▶ The action to be taken by the user should be highlighted, the status should be shown differently and ancillary information should be hidden.

Task 6 - Subscription to email notifications

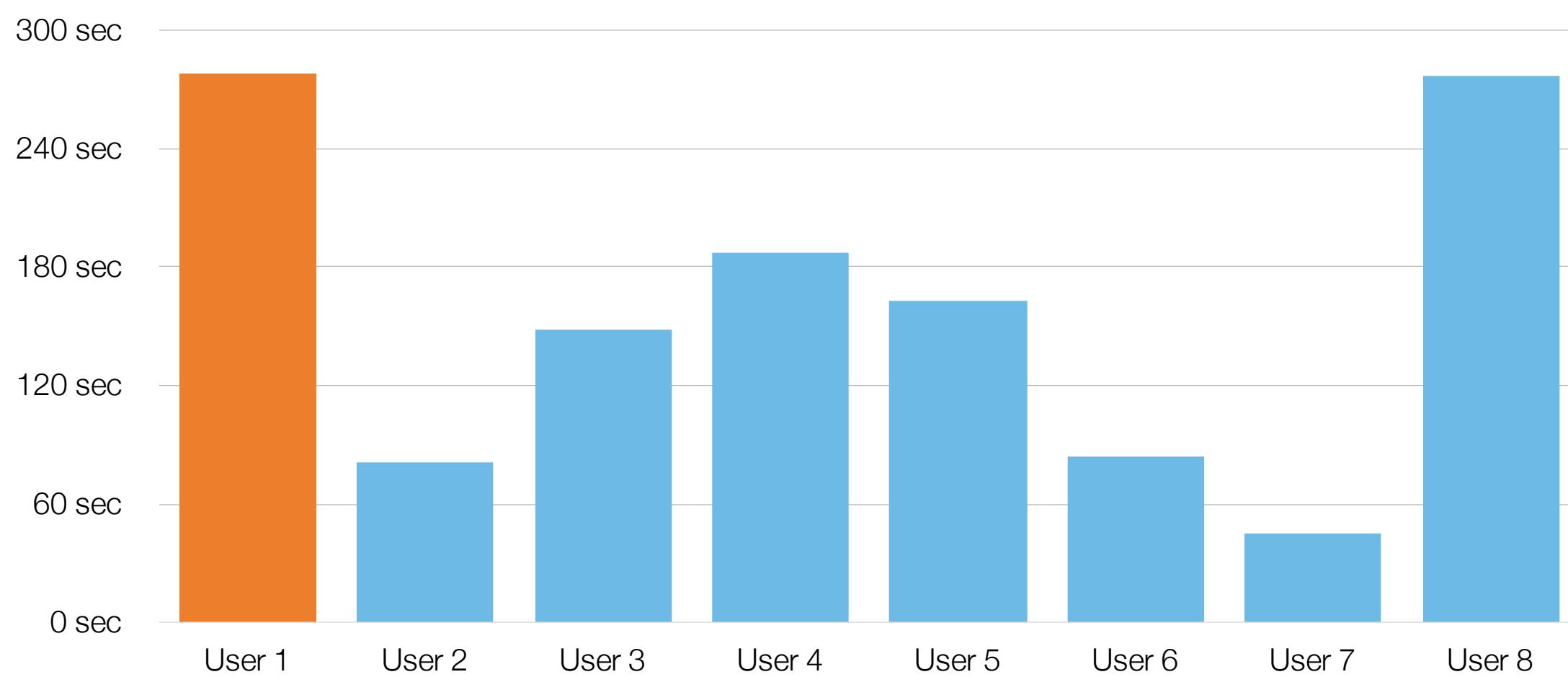
■ Success ■ Minor Mistake ■ Fail

*Find out where to
subscribe to email
notifications.*

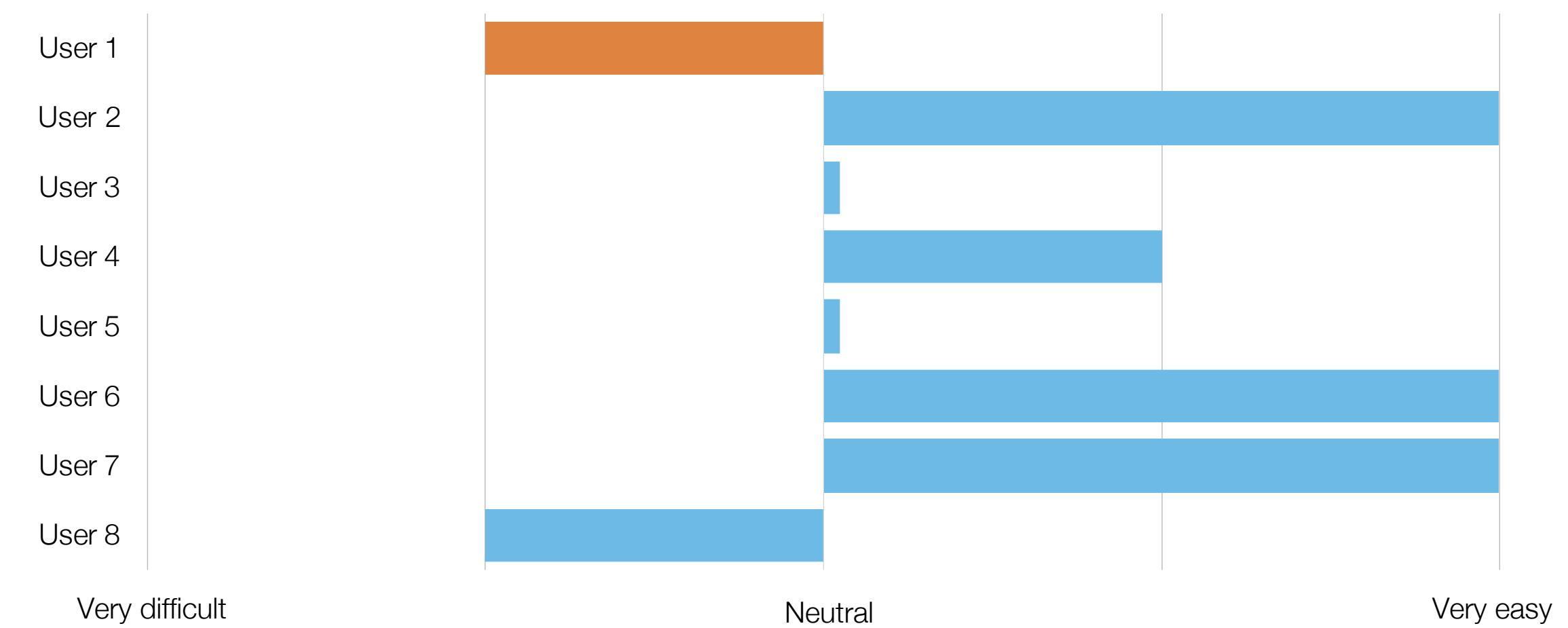
7/8

Users were
Successful

Time on task



Perceived ease of use



Task 6 - Subscription to email notifications comparison

User Test 2 User Test 3

Task completion

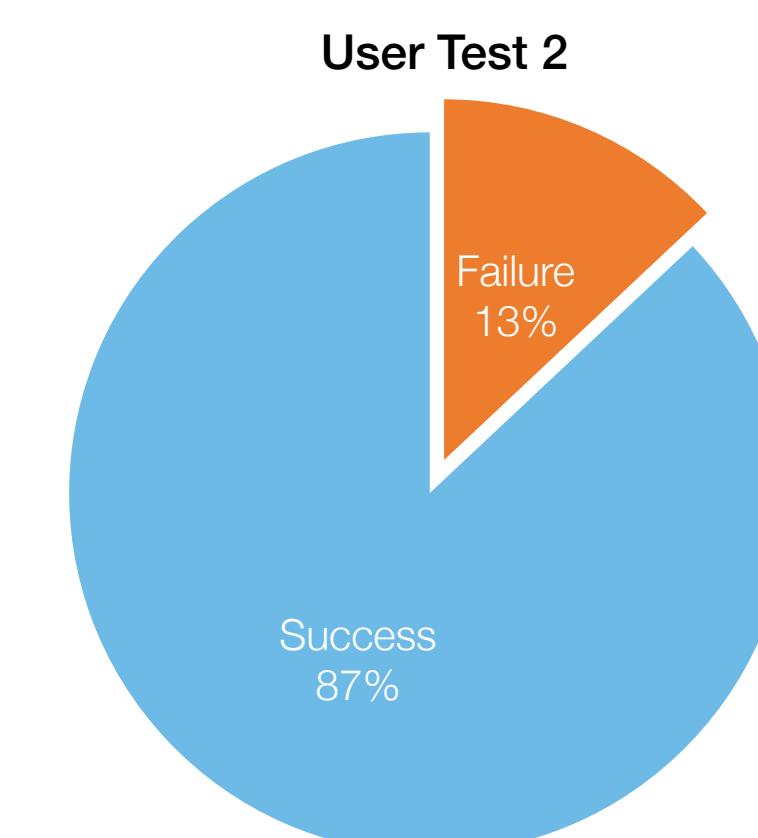
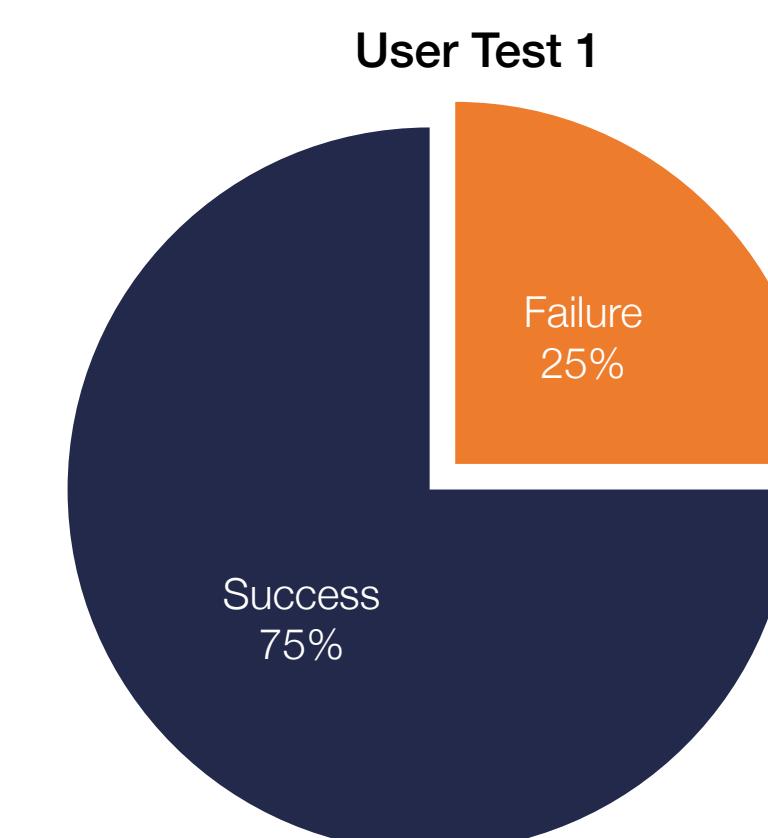
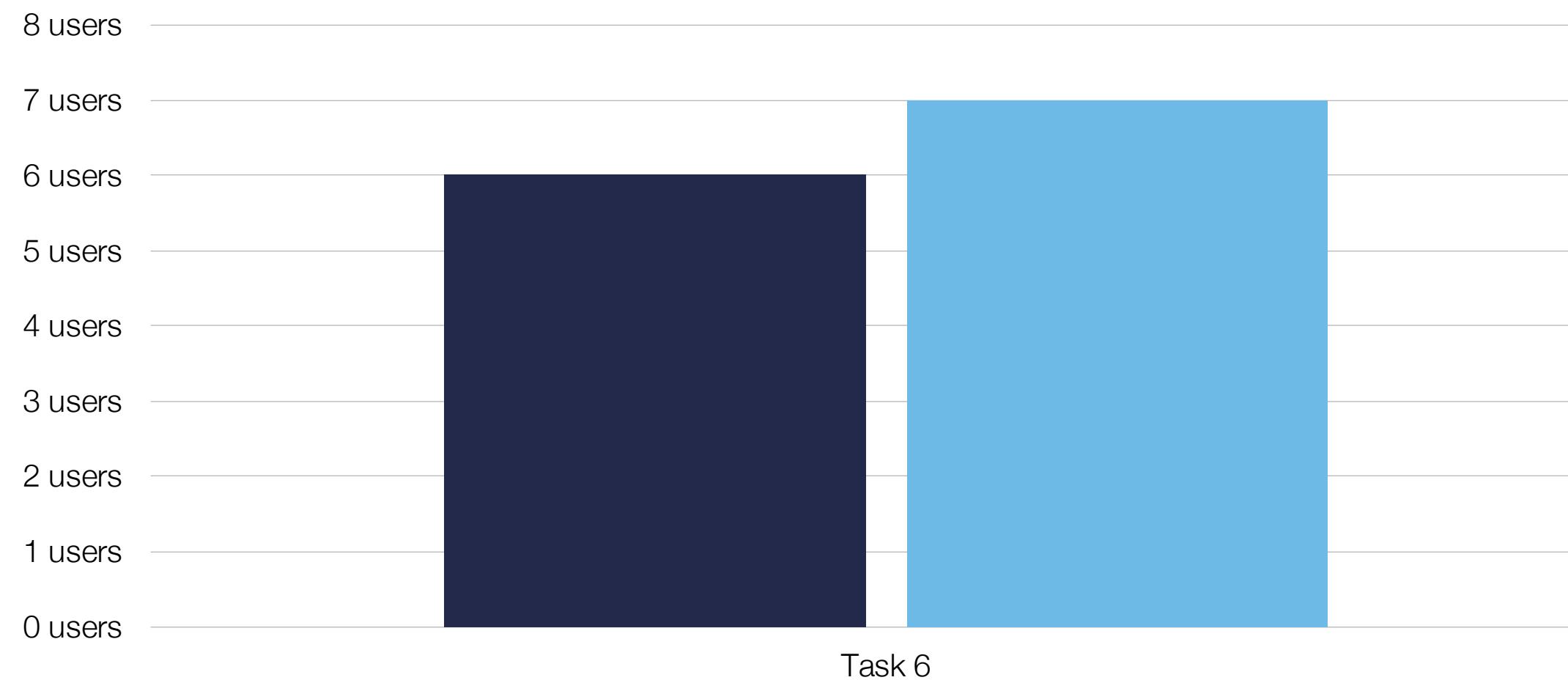
17%
↑

Increase in
task completion

Average success rate

17%
↑

Increase in
success rate



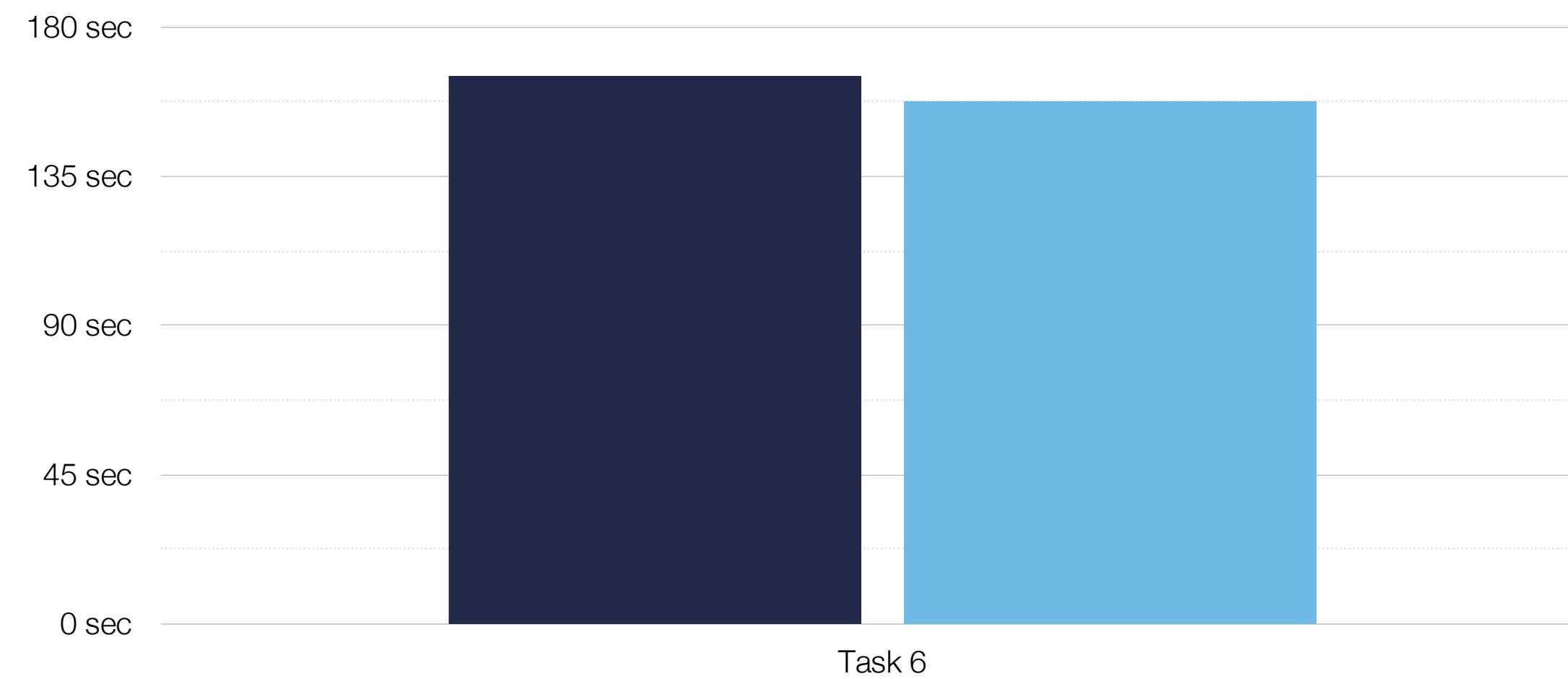
Task 6 - Subscription to email notifications - cont.

User Test 2 User Test 3

Average time on task

4% ↓

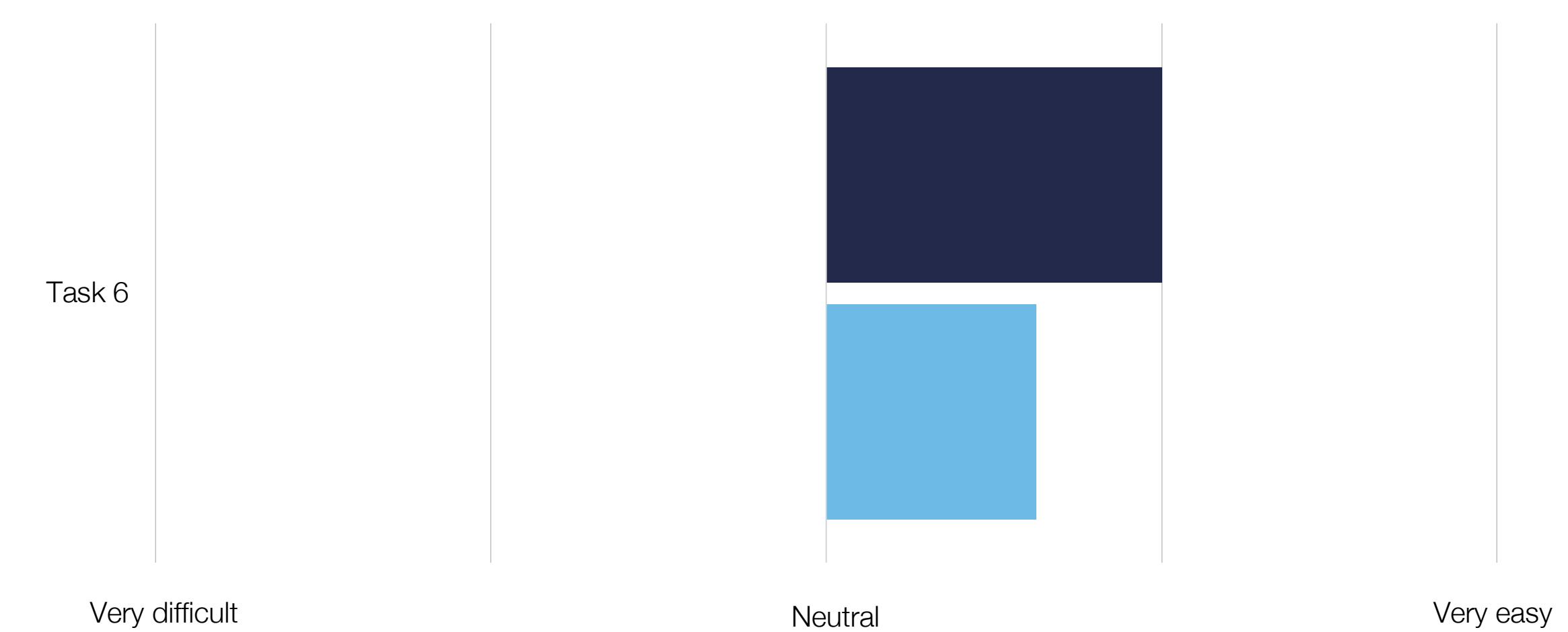
Decrease in
time on task



Average task usability

38% ↓

Decrease in
ease of use



Task 6 - Subscription to email notifications - cont.

Observations

- ▶ Some people are expecting to register for notification under their profile or in the mail page.

“I feel that should be in settings or profile, even where my mailbox is.”

“Wait why it brought me back to PT?”

“Why is it here? That doesn't make sense (“register your email address” under the PT detail page).”

Recommendations

- ▶ include the link for the registration under profile and mail.

Task 7 - Status of 2016 Return Adjustment Request

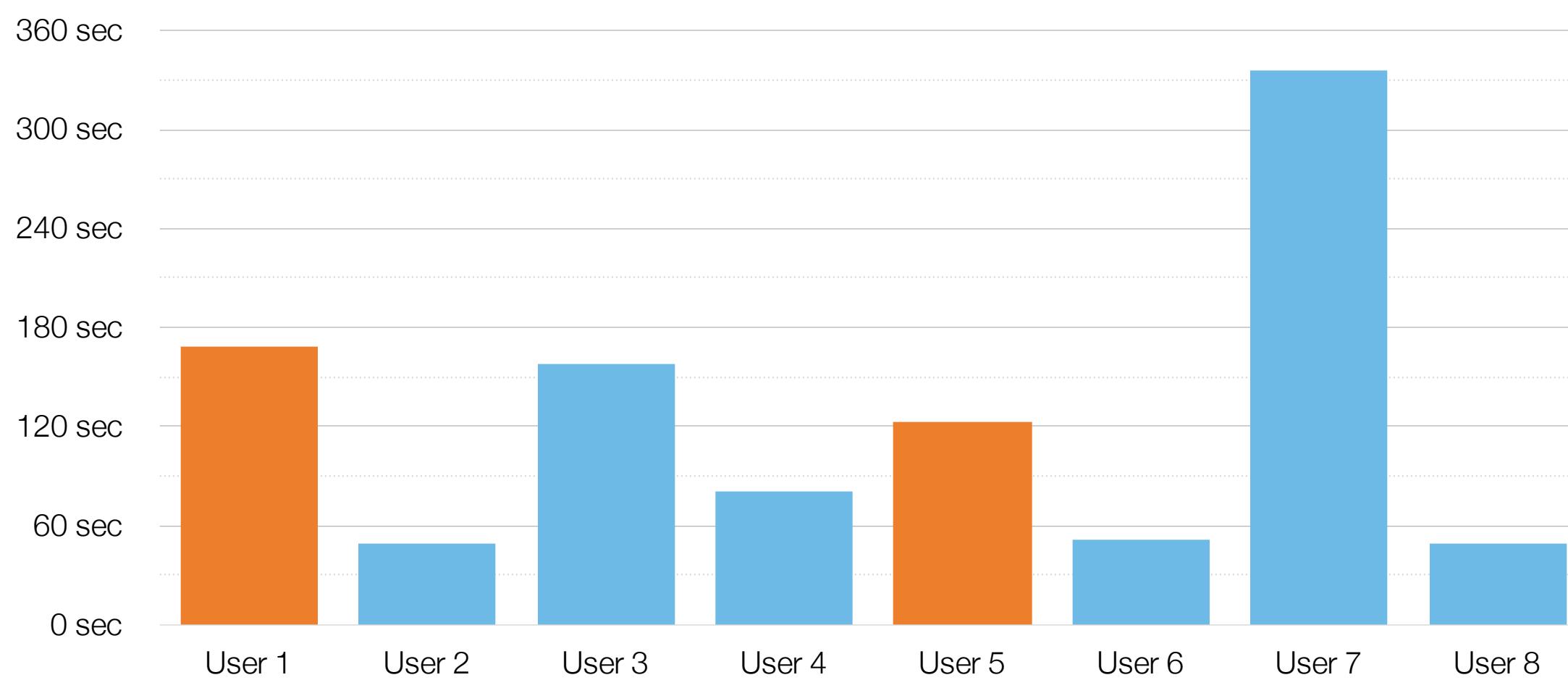
■ Success ■ Minor Mistake ■ Fail

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

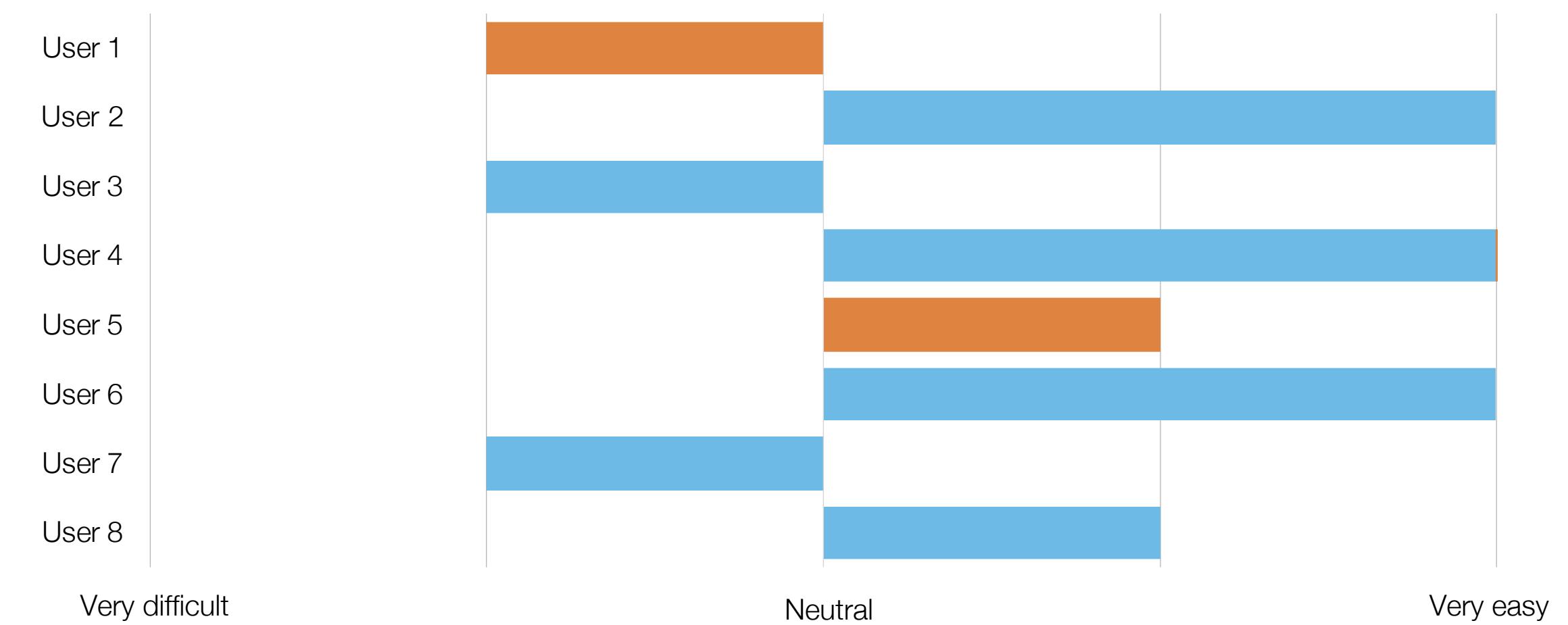
6/8

Users were
Successful

Time on task



Perceived ease of use



Task 7 - Status of 2016 Return Adjustment Request comparison

User Test 2 User Test 3

Task completion

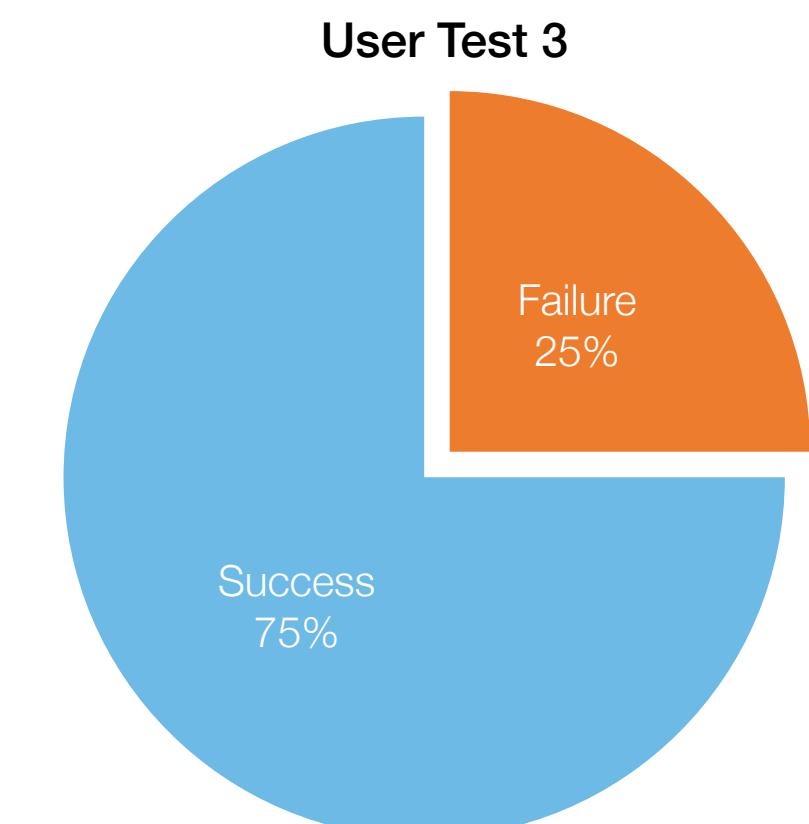
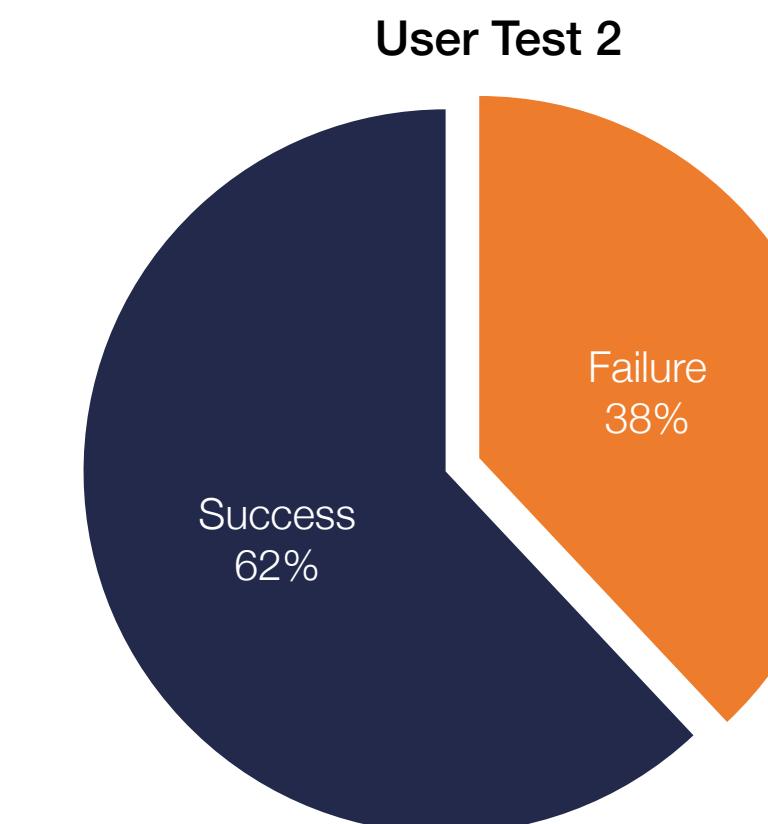
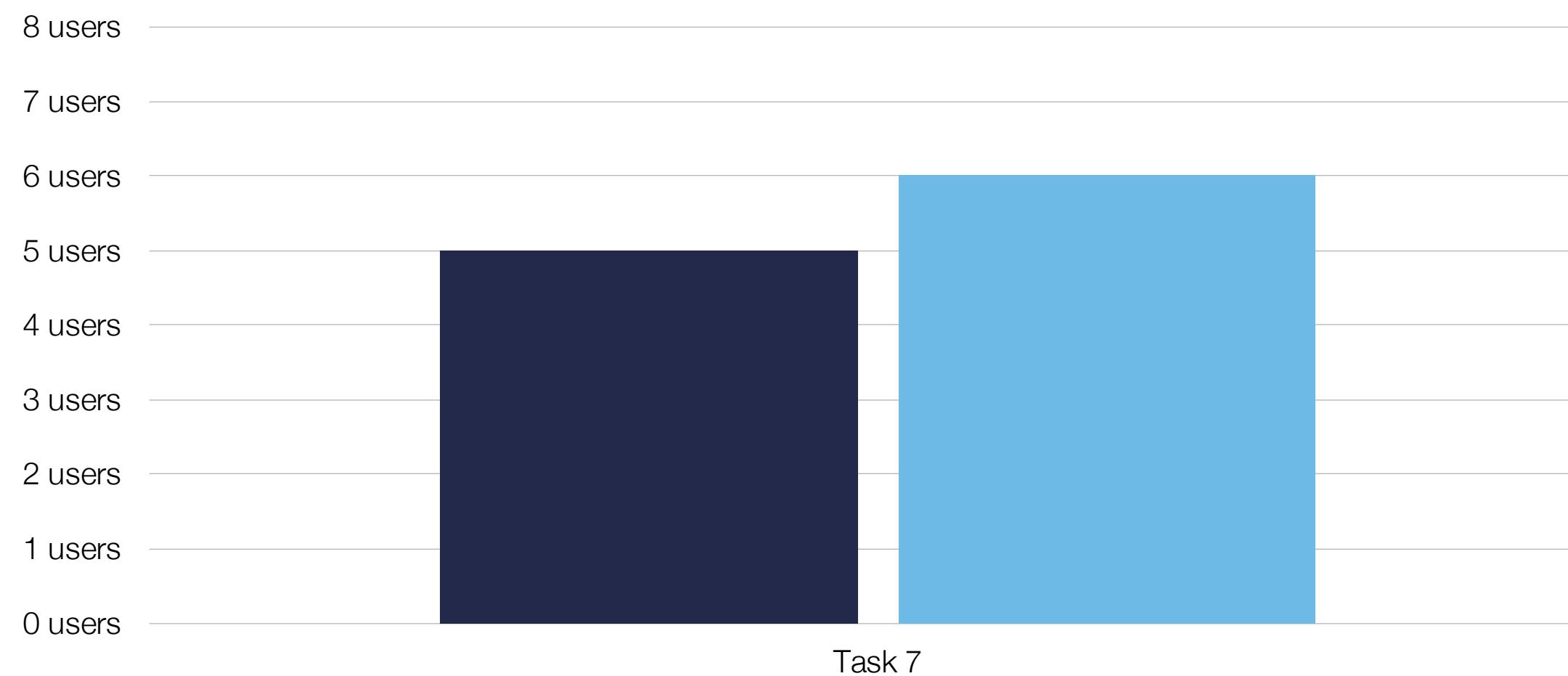
20%
↑

Increase in
task completion

Average success rate

20%
↑

Increase in
success rate



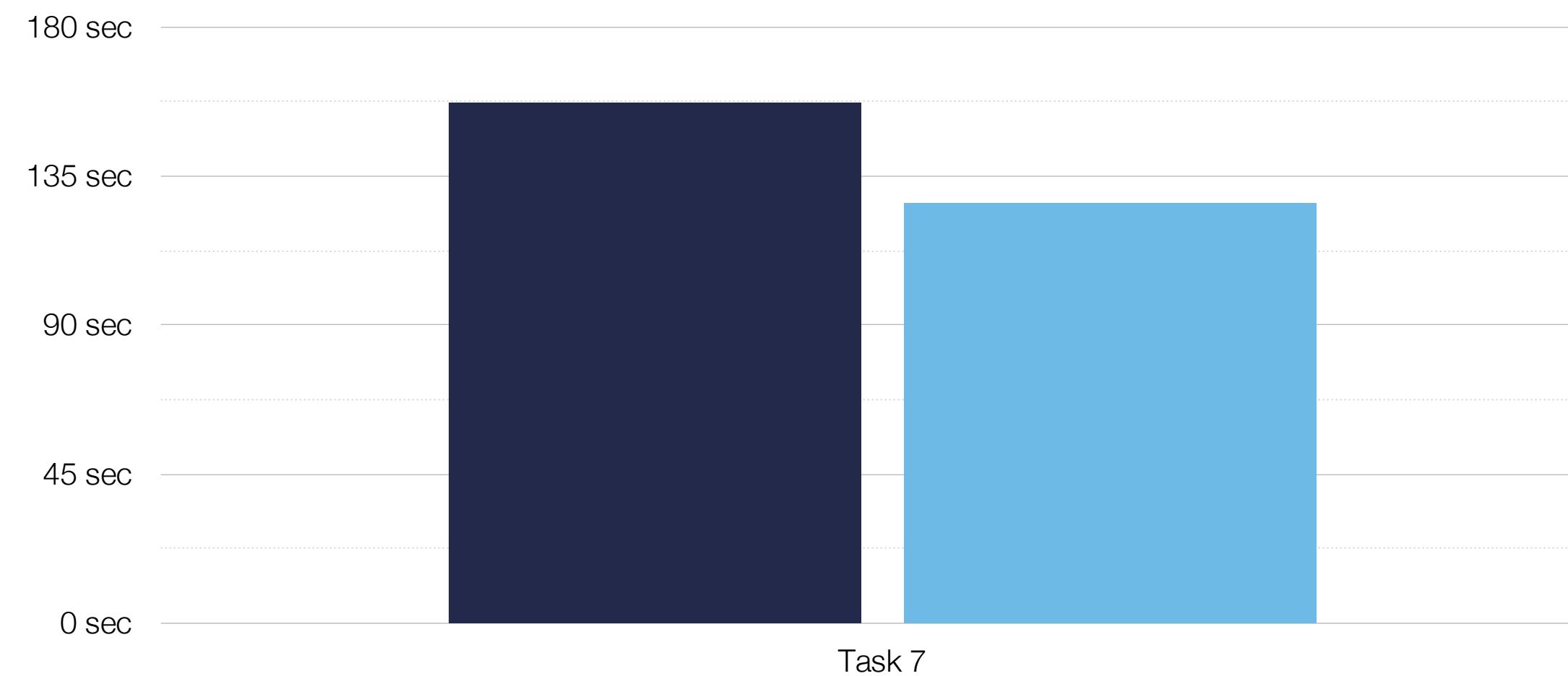
Task 7 - Status of 2016 Return Adjustment Request - cont.

User Test 2 User Test 3

Average time on task

19% ↓

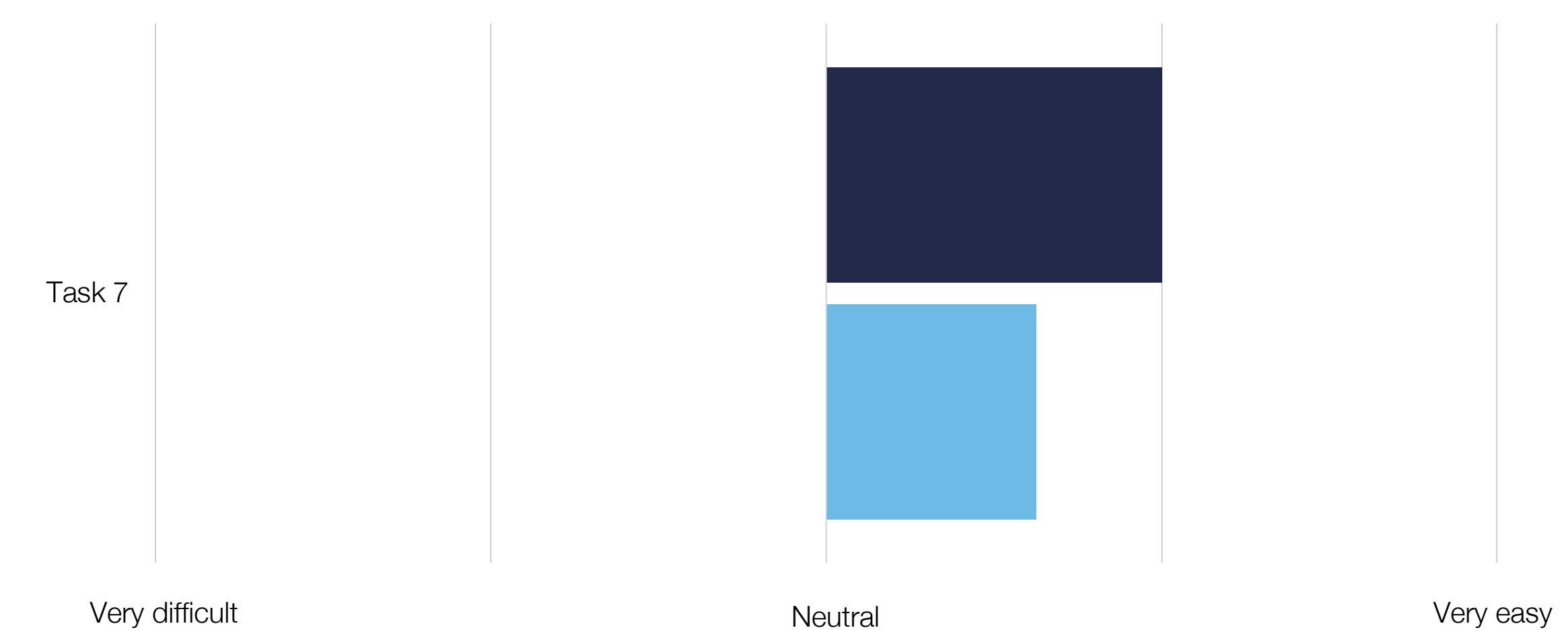
Decrease in
time on task



Average task usability

37% ↓

Decrease in
ease of use



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

Observations

- ▶ The label “Active files” is misleading, and so is the timeline.

“It's not the active files, it's confusing no tab for completed files.”

“That bar on the top doesn't make any sense to me, the bar should be full, they went through all the process, it seems they even not started anything.”

“I'm automatically looking on the tax returns in the ribbons, to view my past returns.”

“You have one option to get to two different places. I would like to see active files and completed or closed files. I have to go under active files so see my active files, and my completed closed files.”

Recommendations

- ▶ Consider eliminating the timeline as it provides little to the user. Modify the label “Active files” to something like “Show files for the last 30 days”.

Task 8 - Letter for the 2019 Return

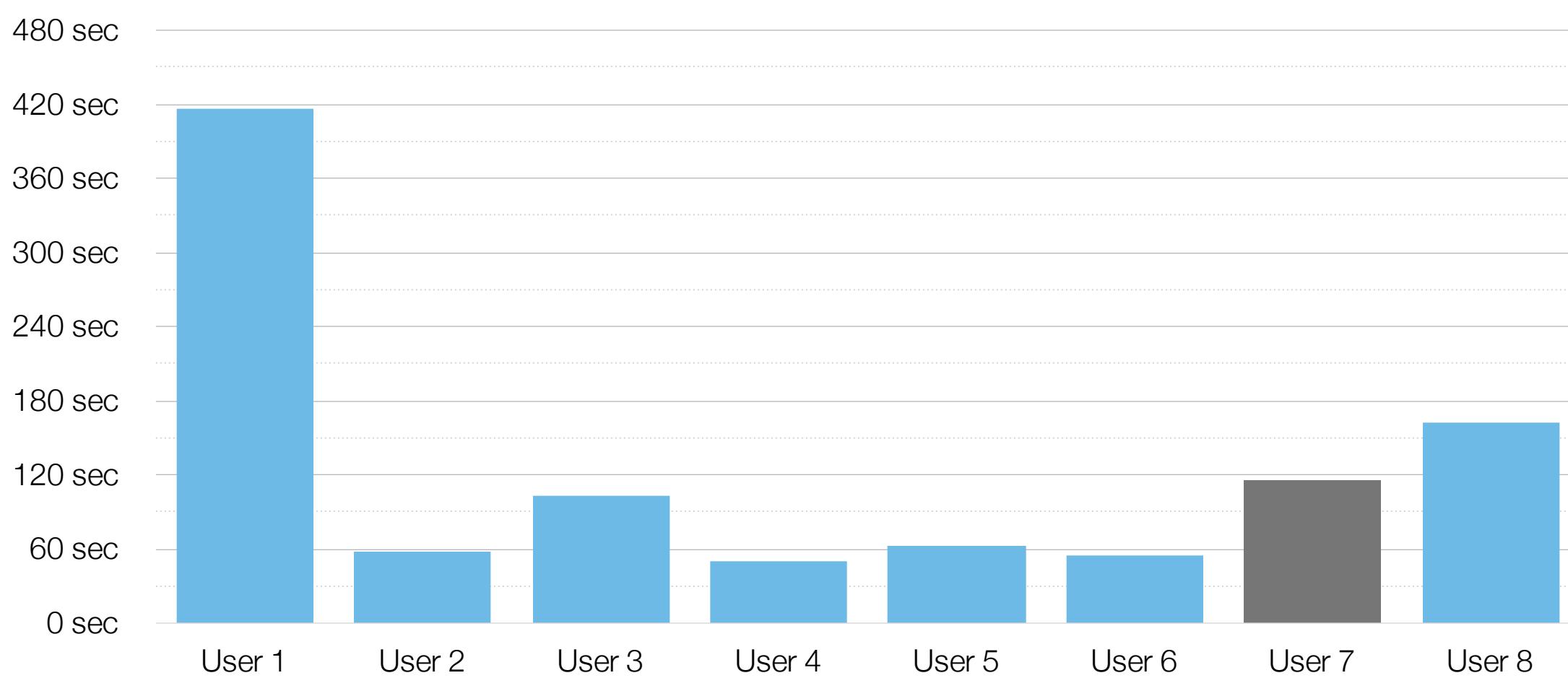
■ Success ■ Minor Mistake ■ Fail

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

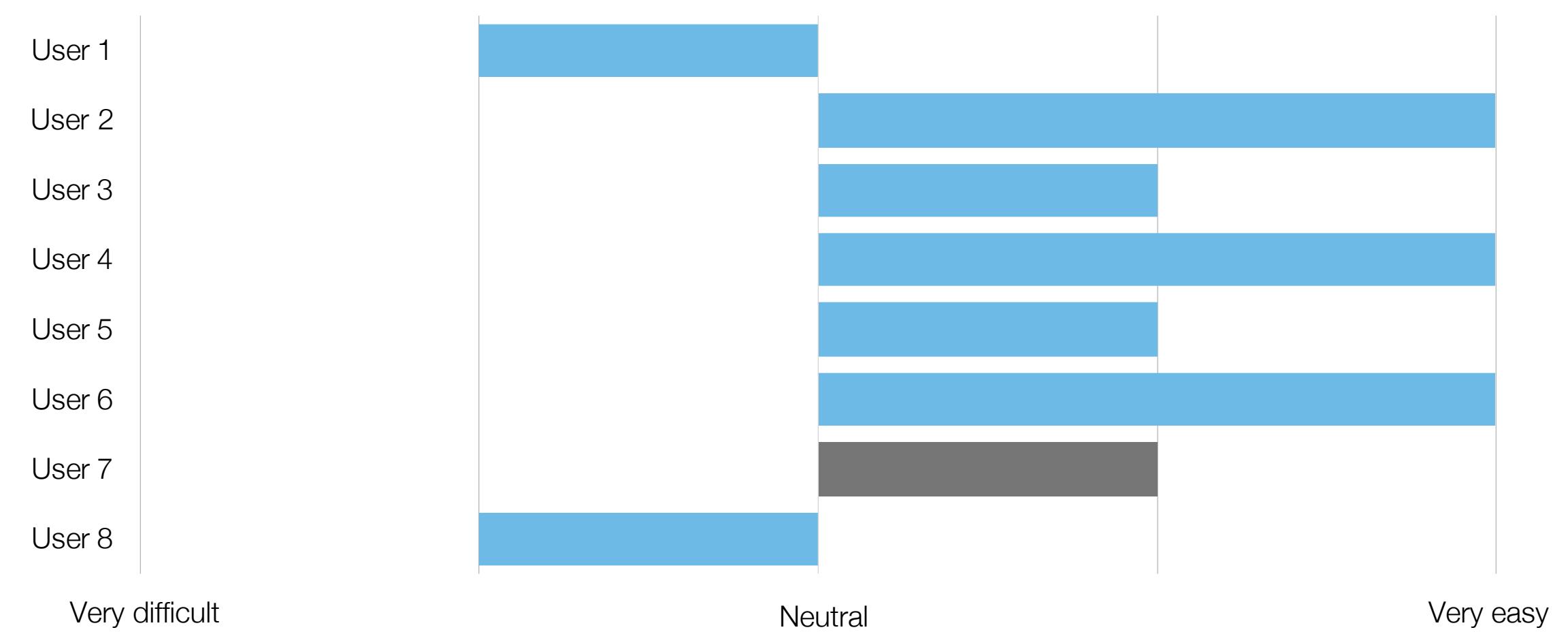
7/8

Users were
Successful

Time on task



Perceived ease of use



Task 8 - Letter for the 2019 Return comparison

User Test 2 User Test 3

Task completion

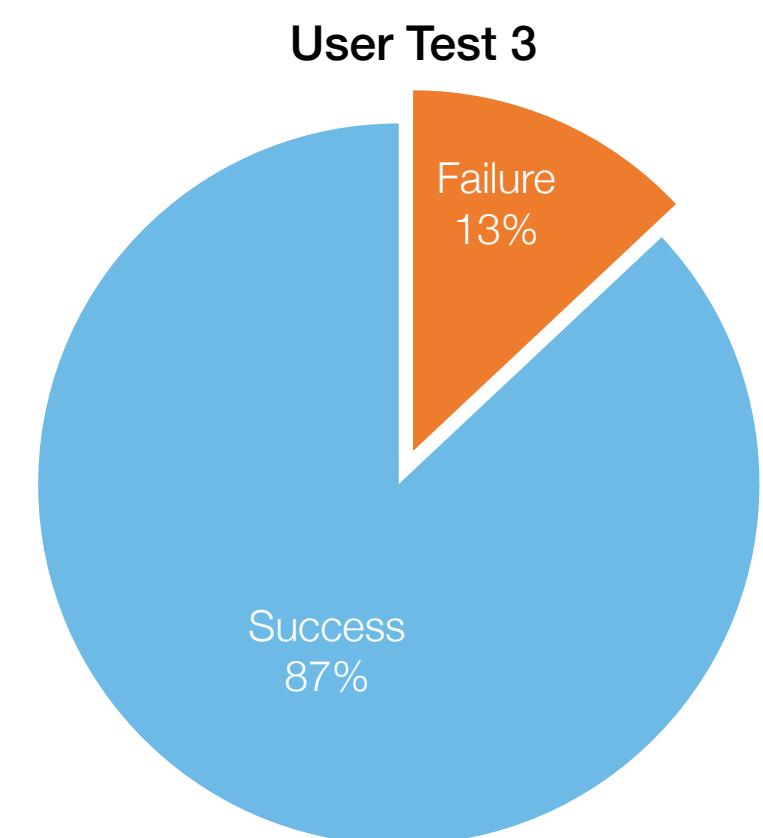
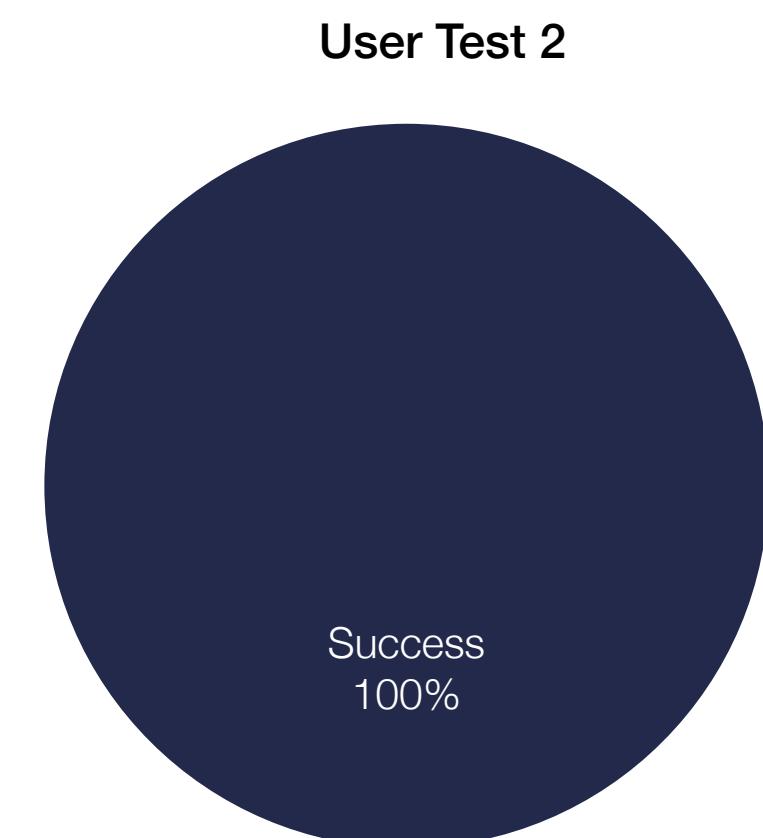
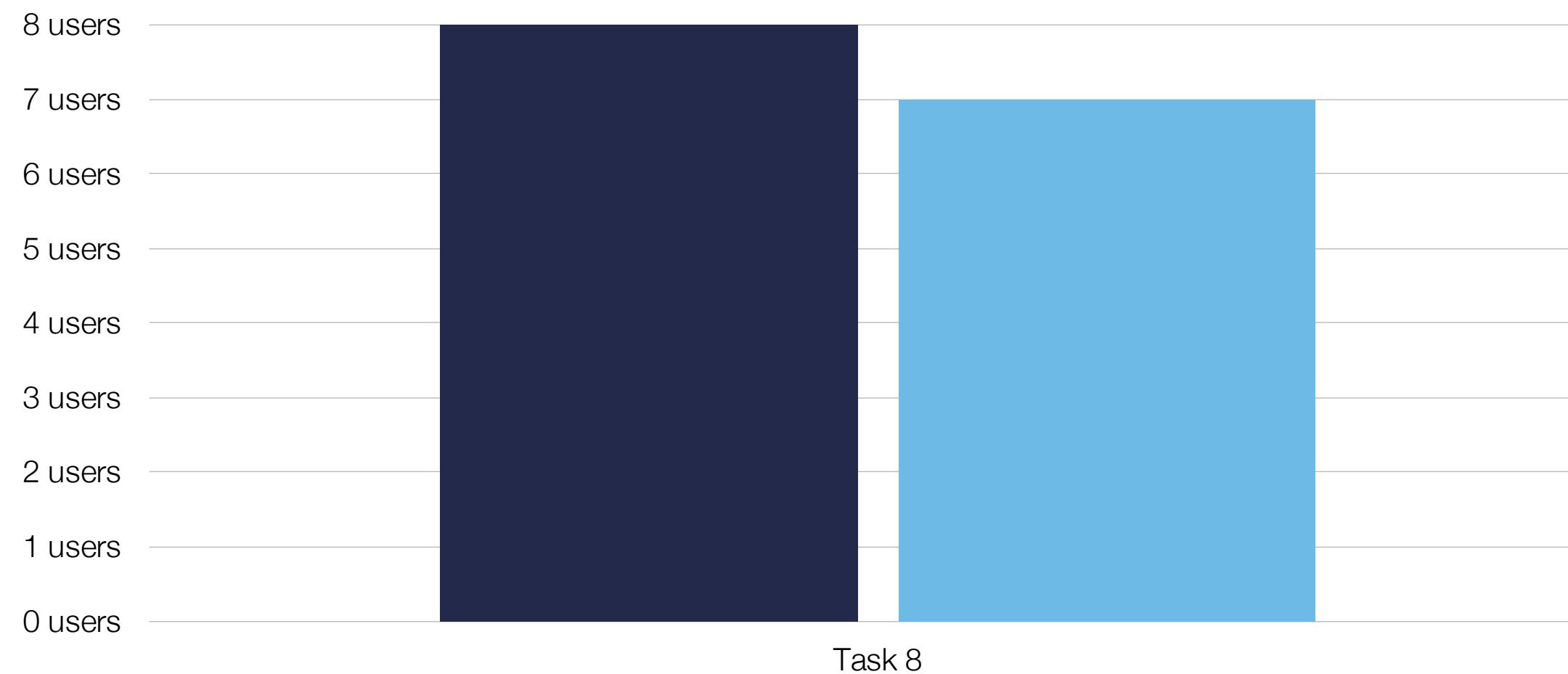
13% ↓

Decrease in
task completion

Average success rate

28% ↓

Increase in
success rate



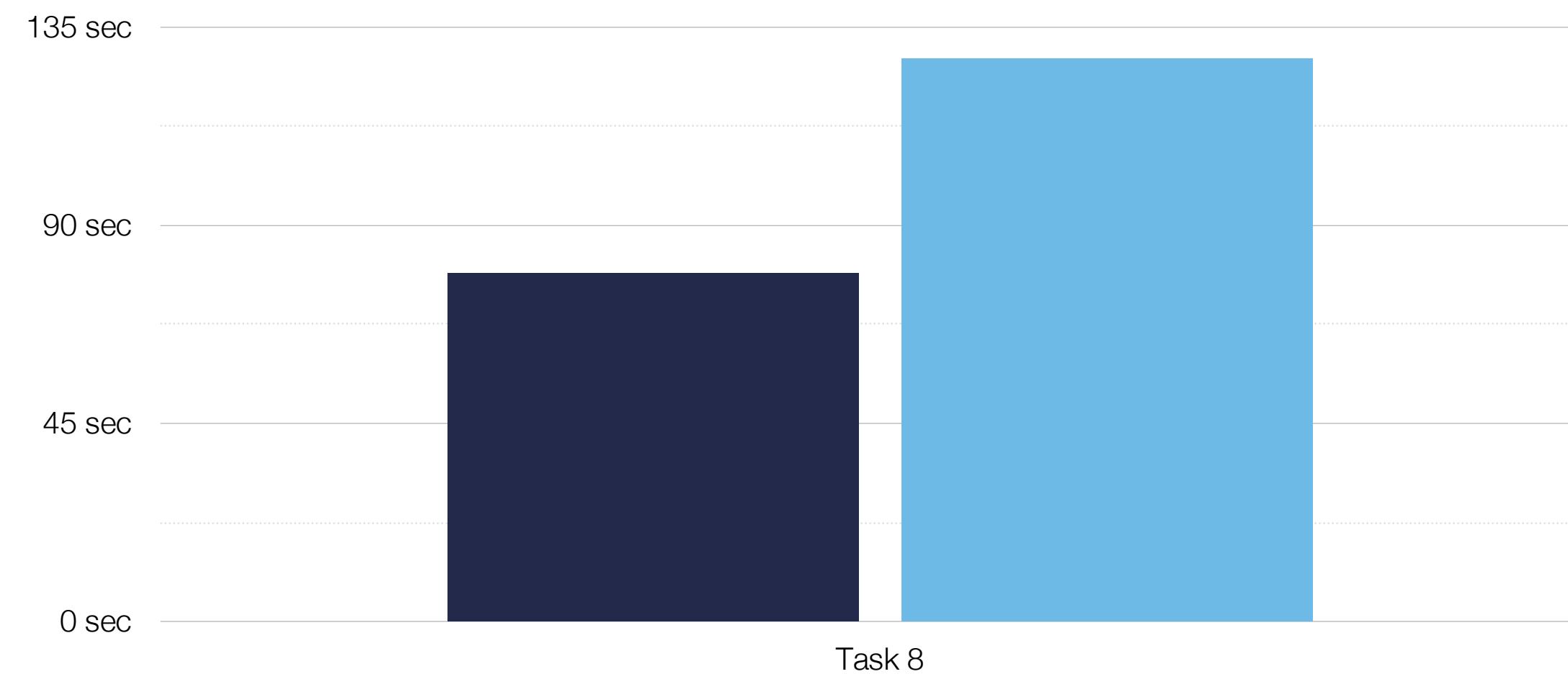
Task 8 - Letter for the 2019 Return - cont.

User Test 2 User Test 3

Average time on task

62%
↑

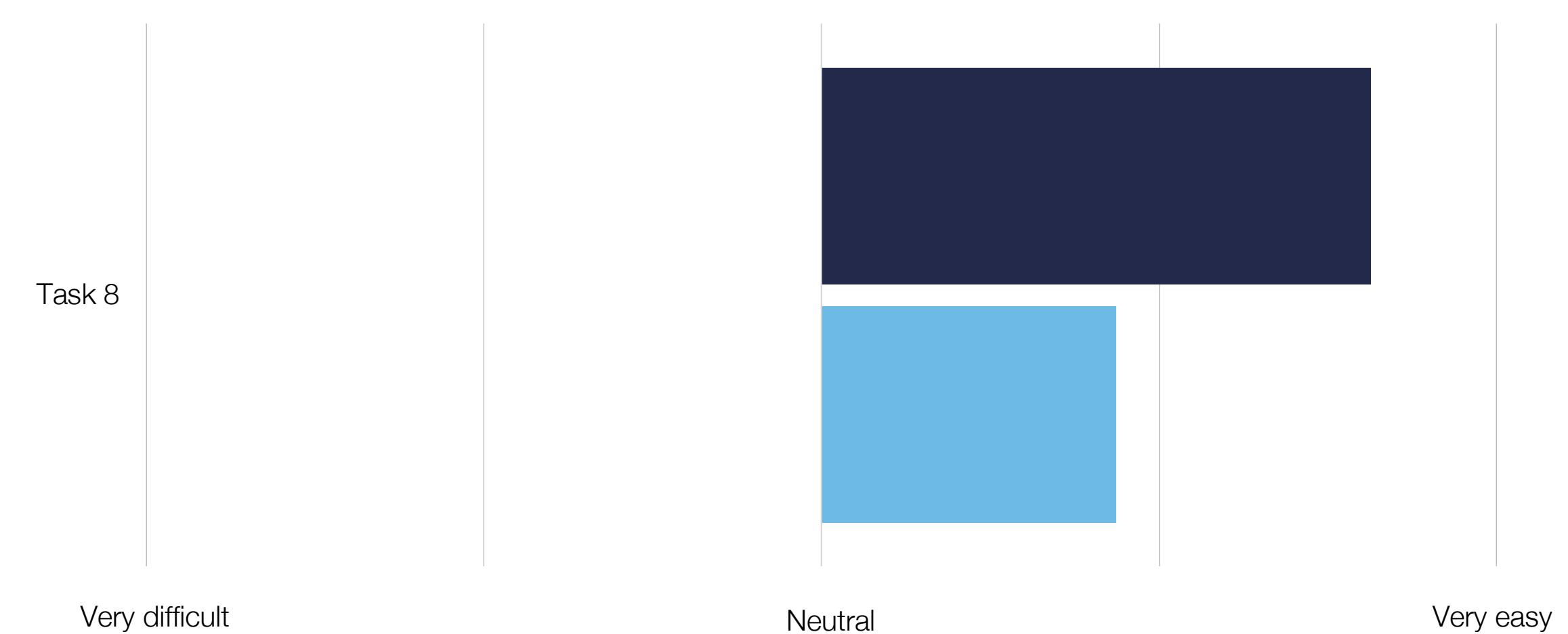
Increase in
time on task



Average task usability

46%
↓

Increase in
ease of use



Task 8 - Letter for the 2019 Return- cont.

Observations

- ▶ Even if the participants noticed that a review was required, they were not certain if they had to do something, or if the required action was only on the CRA side.

“If I have a file active that has a warning, it should be in a red bar on the top of the page.” (mobile)

“That is confusing, the status is my action required. It says CRA required additional review and after your action is required”

Recommendations

- ▶ Avoid changing the start page for the task as this confuses the users.
- ▶ Clarify the labeling, and separate status with action to be taken by the users.

Overall Observations and Recommendations

Observations

- ▶ Conducting usability tests, identifying issues and then making design improvements is the correct way to achieve a satisfactory result. It is however frequent that this leads to a series of ‘tactical’ improvements that do not yield the full benefits that are required. One way to guard against this is to regularly take stock of what has been learned so far in the project and to see if one or more strategic change(s) can solve a number of issues. Shumac proposes that a more integrative step be taken to bring about significant benefits to the CRA and simplify the design, while potentially reducing the implementation and maintenance costs of the design. To help the CRA towards this more integrative solution, Shumac has provided a first cut at such an improved design in the last sub-Section.

Recommendations

- ▶ Users want to succeed at tasks. This task-related information is useful, necessary even, but other information that can be obtained by querying the users needs to be collected and interpreted correctly. At the moment, once the users discover the link “All files”, they go easily to the PT, but they do not have to understand the relationship between the activities nor their chronology. Tasks should be devised to learn how the users can make sense of what is on those detailed pages.
- ▶ The mobile users needed to scroll laterally for reading the content, which annoyed them. Further, for the mobile, they found that the position of the PT box on the overview page is incorrect. It is also not representative of a responsive website. Some users also commented that it would be unlikely for them to use a mobile application to carry out those tasks.
- ▶ Participants who are frequent users of the CRA site seemed to have more difficulties in finding the PT box at the beginning. This is likely due to the stereotyped use that they develop over time. This makes it more difficult for those users to go to a different area to look for a piece of information that they may already know how to find.
- ▶ A participant commented positively on the potential time saving that the PT could bring. The comment was: “Now you wouldn't know it has been assigned to an officer unless you call” “The less I have to call and listen to the music the better is it for me.” “Certain letters are not accessible on CRA account, not into the history, just the paper copy, If they send you a letter, the copy should be online also.”



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Questions?

For any questions contact:
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or Jonathan Rath

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