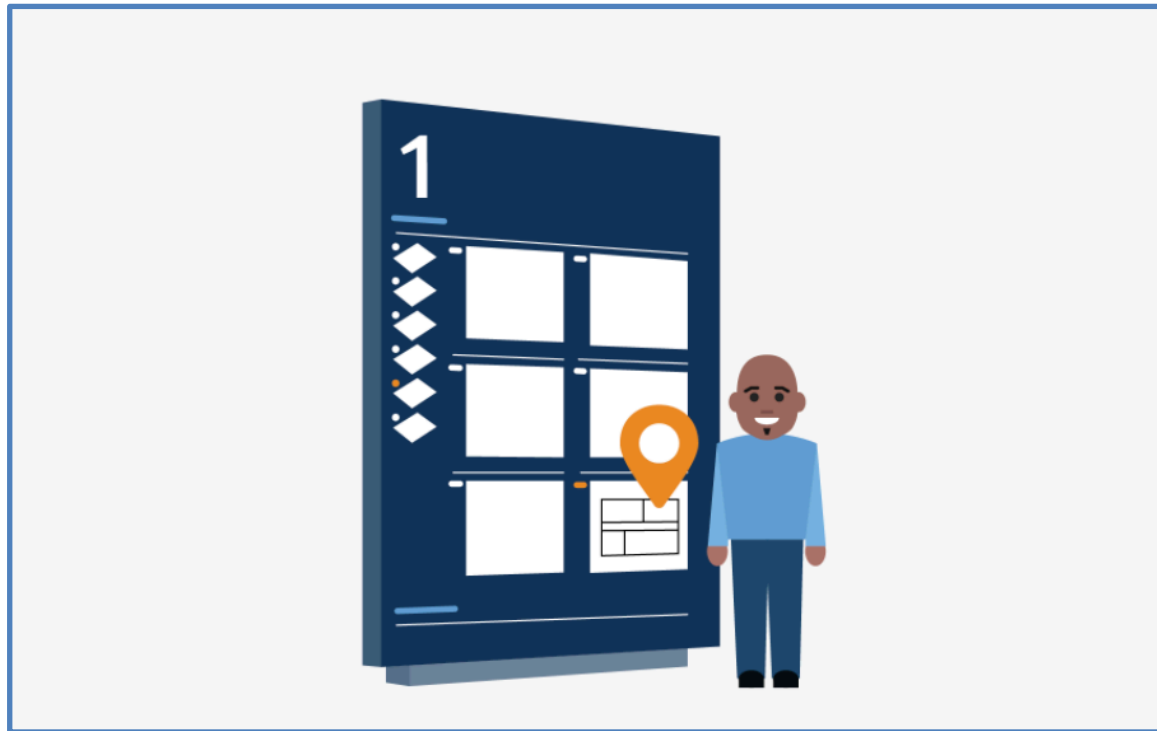


Heuristics Evaluation of <https://tell.acas.org.uk>

By Jon Hardcastle and Sunil Kathare Date 22 Nov 2021



1. Visibility of system status

- Always keep users informed about what is going on.
- Provide appropriate feedback within reasonable time.

Evaluation

- It is not clear where the user is in the form journey.
- It's not clear to a user what the process is or how long it takes.
- The stages listed on the forms start screen are not reflective of the journey or steps.
- User aren't informed what they need at the start of form.
- Early Conciliation users are likely to be confused when they transition between the 2 forms.
- User aren't encouraged or reassured as they progress through the form, lack of reassurance can undermine confidence and result in a feeling of 'system' rather than 'human' and ultimately result in abandonment and a poor experience.
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Recommendation

- Gain an understanding of the users circumstance at the start so we can:
 - show them which steps they need
 - what the step process is through the form(s)
 - what they'll need
 - how long it will take
 - Let users' know which information is completed and which is incomplete
- Consider the tried and tested GDS Task list patterns which tells users which section in the form is completed, which is under progress and which section still needs to be completed.

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2. Match between system and the real world

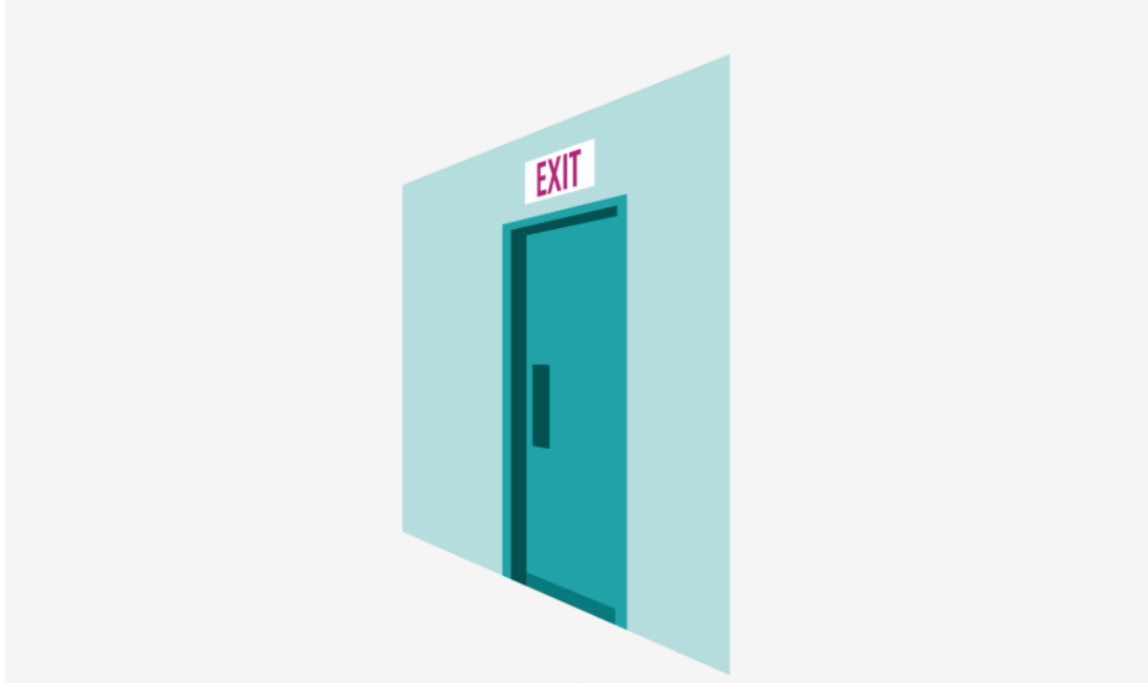
- Speak the users' language, with words, phrases and concepts familiar to the user, rather than system-oriented terms.
- Follow real-world conventions, making information appear in a natural and logical order.

Evaluation

- In most cases the language used is in user's language. However, words like "claimant" and "Respondent" may not make be clear to users
- There are inconsistencies across the user journey in the terminology which will confuse users
- Terminology such as 'Employment Tribunal' and 'Conciliation' need to be explained, users with low literacy and to users who's first language isn't English
- Throughout form 2, headings don't reflect the individual page steps and in fact repeat through the form, this creates a number of problems;
 - Confusion transitioning pages as they initial appear the same
 - Serious accessibility issues because users on assistive technologies can't see the screens and will be disorientated as they will think they are on the same screen
 - Usability issues because heading help convey what a page/form step is about and the sections are about
 - Some field labels can be improved, for example, using first and last name labels can confuse users who's first language isn't English, in many countries first name is the family name.
 - Using examples in the forms can help e.g. a visual of a payslip to help users see the employers legal name

Recommendation

- Audit end to end journey (across all work-streams), identify inconsistent terminology and correct it
- Test terminology with users included those who's English isn't their first language
- If terminology can't be improved show contextual help to explain terms
- Review all form labels
- Provide good help and guidance within forms, use visuals to support help where applicable



3. User control and freedom

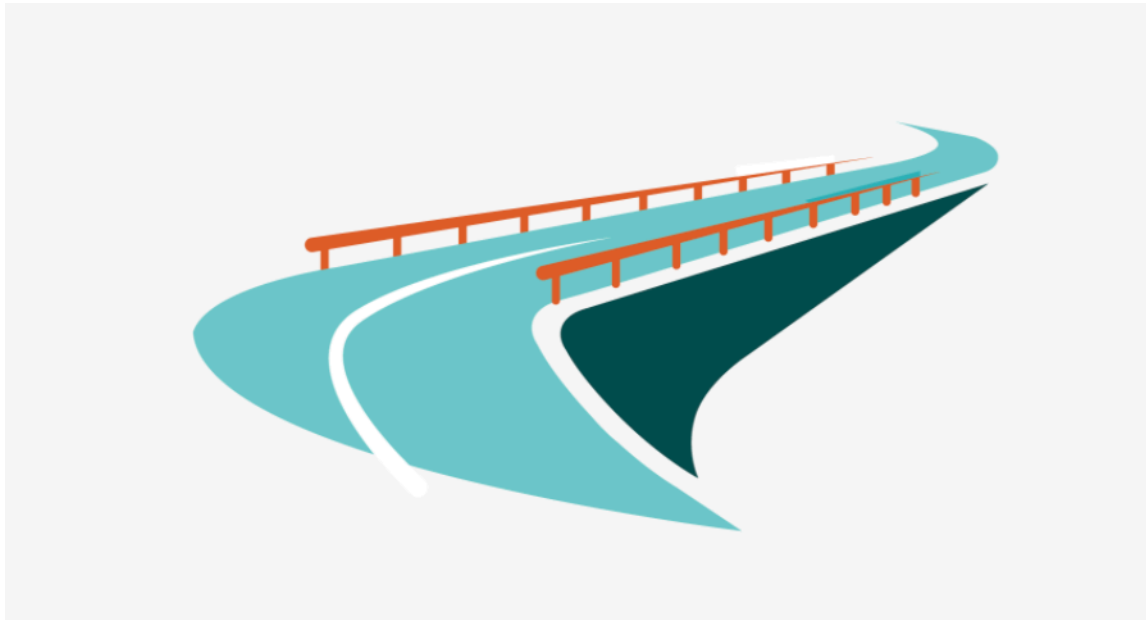
- Users often choose system functions by mistake.
- Provide a clearly marked "out" to leave an unwanted state without having to go through an extended dialogue.
- Support undo and redo.

Evaluation

- Error messages are grouped together which will make it harder for users to find out which error message relates error messages
- Making changes from the review screens results in a user having to click through all subsequent screens, creating unnecessary friction
- There's no 'cancel button' across the forms, user who want to cancel have not confident way to do so

Recommendation

- We recommend using GDS style inline error which shows errors next to form field which has an error
- All users to navigate directly back to the review screen when making changes on individual form steps
- Provide a cancel button with a warning message



4. Consistency and standards

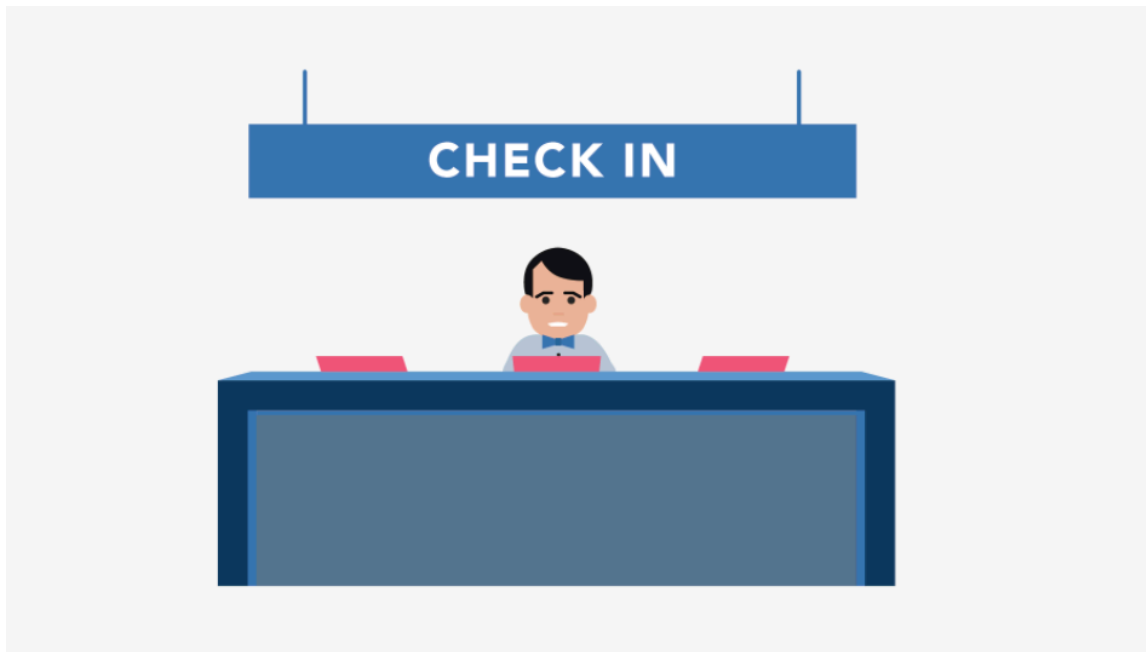
- Users should not have to wonder whether different words, situations, or actions mean the same thing.
- Follow platform conventions.

Evaluation

- There are cases where form components are different, for example there's an address lookup for claimant's address, but not for an organisation's address.
- Terminology isn't consistent across the end to end journey 'Tribunal', 'Dispute' and 'Claim' are interchanged
- Fields aren't consistently marked across the end to end experience, the second form has no markings to indicate which are optional or mandatory fields and on the first form some fields marked optional are actually mandatory
- Field validation doesn't follow a consistent or conventional best-practice approach
- There are cases where field labels can be clear e.g. instead of 'Address line ', use 'House number (or name) and street name'
- When making a change from the review screen the CTA is continue which takes the user back through the form

Recommendations

- Be consistent in terms of everything across the end to end experience;
 - Terminology audit and test
 - UX patterns e.g. consistent approach to populating addresses
 - Validations
 - Labelling fields as optional or mandatory
- Follow well established approaches to validation e.g. GDS
- Ensure CTA labels convey what will happen next



5. Error prevention

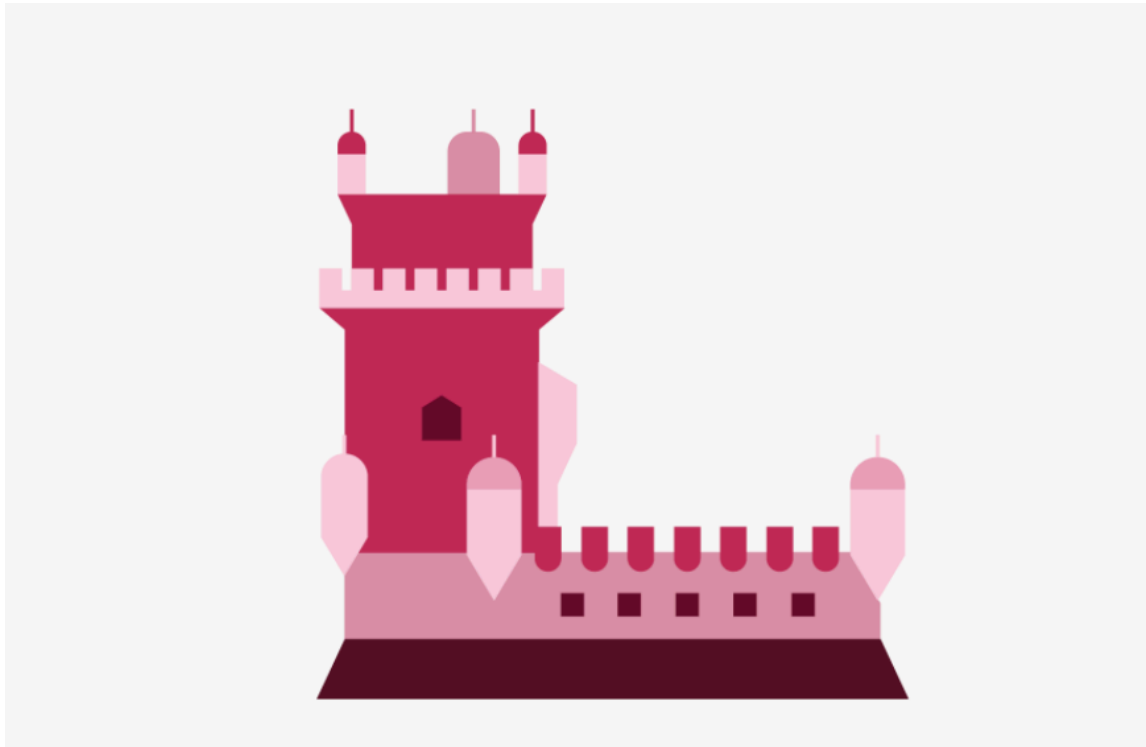
- Even better than good error messages is a careful design which prevents a problem from occurring in the first place.

Evaluation

- Fields aren't consistently marked across the end-to-end experience, the second form has no markings to indicate which are optional or mandatory fields and on the first form some fields marked optional are actually mandatory
- In some cases, error prevention in the service (e.g. agent received inadequate details) can be attributed to form fields not being structured well enough to capture structure details from users
- Many fields would benefit from better labelling and help/guidance
- Field validation is basic at best e.g. name field support single non-alpha characters
- Absence of 'what you'll need' at the start will mean that users have to find details which aren't to hand mid-way through the form, this can result in abandonment or timeouts and creates a poor experience
- Users not knowing how long the form is and the stage they are at will also contribute to problems

Recommendations

- Mark fields consistently which are mandatory across the end-to-end experience
- Break down large free text fields into separate fields with clear labels to give better guidance and structure to the data completion
- Improve field labelling to be clearer
- Provide information about what a user needs before starting the form based on their circumstances



6. Recognition rather than recall

- Minimise the user's memory load by making objects, actions, and options visible.
- Make objects, actions, and options visible.
- User should not have to remember information from one part of the dialogue to another.
- Instructions for use of the system should be visible or easily retrievable whenever appropriate.

Evaluation

- Users have to recall the stages of the form the first screen (which isn't reflective anyway) - users have to remember this
- The review screen - 'check my answers' is long and poorly laid out
- The form uses progressive display which can cause usability issues
- There's very little guidance or help information in the form

Recommendations

- Apply a clear step tracker so the user is re
- We recommend using GDS pattern for the review screen 'checking my answer' page. And enable users to navigate straight back to the review screen from any screen in the form
- Move journey fork questions to the beginning of the form to remove in-form friction and ensure that users at the start know what they'll need creating a tailored form experience that removed progress fields and steps from the form journey
- Add guidance into the form to address pain points in the forms



7. Flexibility and efficiency of use

- Accelerators -- unseen by the novice user -- may often speed up the interaction for the expert user so that the system can cater to both inexperienced and experienced users.
- Allow users to tailor frequent actions.

Evaluation

- We've not seen much in the ways of accelerated interactions but there are opportunities

Recommendations

- Consider using browser form auto complete which is easy to add and can help advanced users complete data very quickly
- Use services to enhance the experience such as address lookup to remove data entry friction and to improve data quality (E.g., Loqate : <https://www.loqate.com/en-gb/>). Always with a with fall back to manually entry.
- There may be scope to use the Companies house API for employers details with fall back to manually entry



8. Aesthetic and minimalist design

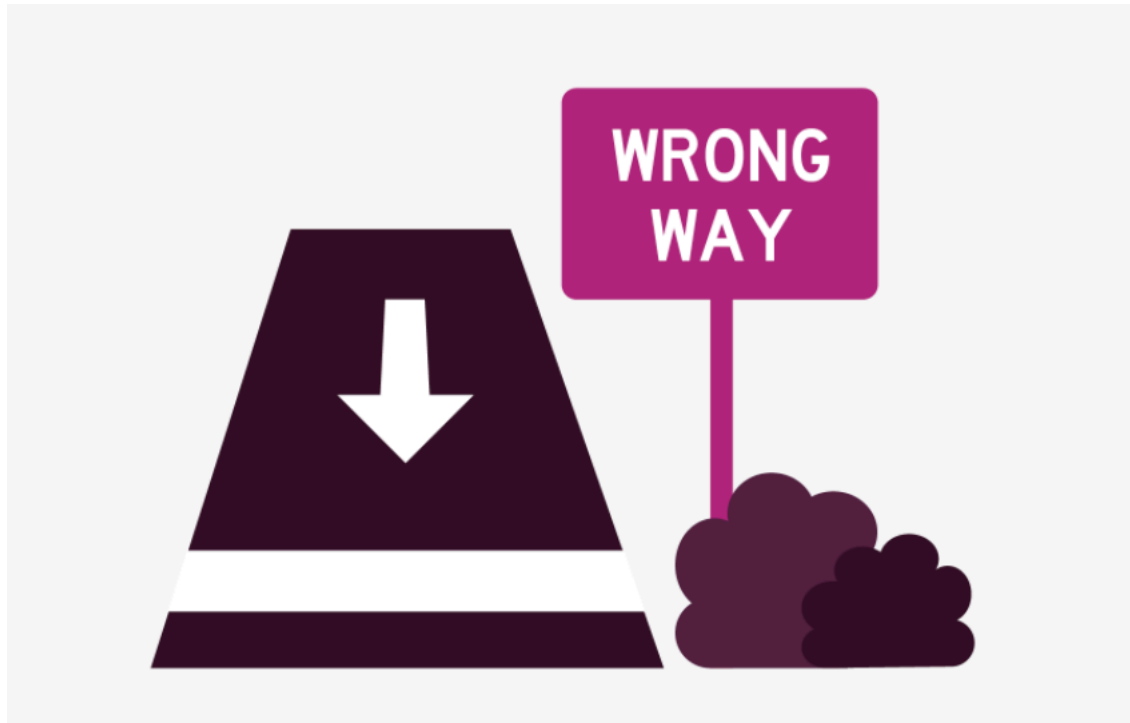
- Dialogues should not contain information which is irrelevant or rarely needed.
- Every extra unit of information in a dialogue competes with the relevant units of information and diminishes their relative visibility.

Evaluation

- There's a lot of unnecessary messages, which can alarm the users E.g. "Be aware that if you give a work email address, your employer may be able to read your emails" - these messages can make users' anxious and users may be put off from EC because of this may affect their emotional state
- The initial pre-form screens are overloaded with information which should be in the guidance area of the website before starting the form
- The initial pre-form screens create a lot of friction and we believe friction
- There's areas where lots of information is provided but it's unlikely users will read it
- There are a number of questions in the form which fork the journey - these can cause friction, in part because they aren't expected. And break the fluid flow of the forms

Recommendations

- Ensure users are well informed before starting the form so that the form makes sense to them in terms of terminology and what's being asked of them
- Rather than trying to explain everything with paragraphs of copy on the pre-form screen have simple questions / eligibility to help the user make an informed decision as to which service to use and if they have considered everything they should have before starting e.g. "Have you tried speaking or writing to your employer?", these types of questions can provide a great experience because we can signpost them to where they can e.g. CA letter templates
- Reimagine warnings like "Be aware that if you give a work email address, your employer may be able to read your emails"... Instead use simple, positive below field suggestions like "It's best to use a personal email address"
- Move the in-form fork questions to the start (e.g. do you have a representative) so that users will gain a good idea of what they need before starting the form and so that we can provide an exact list of what they'll need, what the steps will be and how long it will take to complete. This will also create a more fluid experience by removing fork questions.
- We recommend using progressive disclosure to show information as and when need e.g. for help and guidance



9. Help users recognize, diagnose, and recover from errors

- Expressed in plain language (no codes)
- Precisely indicate the problem
- Constructively suggest a solution.

Evaluation

There are a number of problems with validation in the forms;

- Fields aren't consistently marked as option or mandatory, this sets the user up for a poor experience
- Error aren't consistently applied in terms of look and feel or interaction
- Some screen show red error, in 1 case a green error and in some cases at red warning panel at the top of the screen
- In the case of the red warning panel at the top of the screen, the fields listed don't exactly match what they are labelled in the form and no links are provided to quickly anchor the users to the field with the error

Recommendations

- We recommend using GDS pattern for error messages inline making it easier for users to know which field has the errors
- Use a consistent approach across all field
- Consistently mark fields that are required or, alternatively only optional ones
- Always show the list of fields with errors at the top of the screen and provide links on each error to anchor to the respective field
- Ensure all error wording is consistent with field labels
- Ensure that wording describing the error is clear and is presented above the field with the error



10. Help and documentation

- Even though it is better if the system can be used without documentation, it may be necessary to provide help and documentation.
- Help information should be easy to search, focused on the user's task, list concrete steps to be carried out, and not be too large.

Evaluation

- The guidance on the route into the forms isn't very clear — there's a lot of room for improvement in guidance and information before the forms
- Guidance such as detail around exactly what you need to complete the forms, what the steps are (accurately) and how long it will take are mostly very generic to the point of not being helpful or entirely absent
- Throughout the forms help and guidance is missing
- Many fields are optional within the forms but there isn't sufficient information explaining the consequence of not providing some types of information
- Guidance after the form(s) have been submitted is also lacking and is likely to result in chase up-calls by applicants which provides a poor experience for clients and colleagues alike

Recommendations

- Ensure that users are well informed before starting forms regarding;
 - What/who the service and form is for
 - What they need
 - What the steps are and how long it will take
 - How long the overall process will take
- Ensure there is good guidance in forms at field levels
- Explain the consequence of not supplying information at field level and also on review screens
- Ensure there's a progress tracker present in the forms showing completed sets, steps that need to be completed
- Consider other means of help , "Do you need help?" In an accordion, which can have assisted digital options like, customer support and/or web chat (omni channel experience)
- Once forms have been submitted ensure that the confirmations cater for all user needs e.g. ;
 - How long will it take before the applicant hears from ACAS
 - What if I need to change something
 - What if I want to cancel
 - My employer has settled
 - I want to speak to a human
 - Will I get frequent updates - how can I get/see updates?