

Ladder Up Usability Test Report

HCI 460 - Spring 2015

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<i>All group members recruited two participants for the usability test and attended the live testing sessions.</i>	

Executive Summary

Ladder Up is a non-profit organization that provides tax assistance to low income households in the greater Chicago area. Ladder Up accomplishes this by recruiting volunteers who must all go through a training process. The organization teamed up with us to do an evaluation of their site. They specifically asked whether we could help assess their volunteer process. They also asked if we could determine whether their training videos were discoverable.

We decided to focus on five tasks where we felt the site could use improvement the most and drafted a test plan relating to these five tasks. The plan called for users to register for the site and locate Ladder Up's training videos. Next, participants completed the Volunteer Standards of Conduct Training and the Volunteer Agreement. Finally, participants reviewed the Intake/Interview and Quality Review Training PowerPoint.

Once we finalized the test plan, we recruited eight participants and had them complete a usability test. Overall, we found that users seemed to like the site, but further testing revealed a number of outstanding concerns. We found consistency lacking and that site in general lacks feedback. We also noted that there is some redundant information requested from users.

This is a summary of our recommendations: First, fix the minor issues on the registration form. Embed the training videos, Volunteer Standards of Conduct document, and the Intake/Interview and Quality Review Powerpoint within the site (as opposed to opening in a new tab or browser window). Provide more feedback and verification within forms and enforce consistency across these forms. Finally, we recommend that the large training materials be broken into smaller chunks to support users.

Methods

Objectives

Our heuristic analyses and cognitive walkthroughs highlighted a number of errors within the Ladder Up site. These represent situations where there may be an opportunity to implement a better, more functional design. Overall analysis left us with eight questions, below, that our usability test sought to investigate further.

Research Question:	Are users able to find the Registration form from the organization's main website (goladderup.org)?
Associated Tasks:	<ul style="list-style-type: none">● Register for the Volunteer microsite
Collected Data:	<ul style="list-style-type: none">● Number of pages user visits before finding the Registration form● Verbal user comments (recorded)● Time spent locating the registration form

Research Question:	How many errors does the user make when filling out the Registration form on the site?
Associated Tasks:	<ul style="list-style-type: none">● Register for the Volunteer microsite
Collected Data:	<ul style="list-style-type: none">● Count the number of errors made on the form● Verbal user comments (recorded)● Time spent completing registration form

Research Question:	Do users ever encounter steps in the training process where it is not clear how to proceed? What help did the system provide?
Associated Tasks:	<ul style="list-style-type: none"> ● Register for the site ● Find the training videos ● Complete the Volunteer Standards of Conduct Training ● Complete the Volunteer Agreement ● Complete the Intake/Interview and Quality Review Training PowerPoint
Collected Data:	<ul style="list-style-type: none"> ● Number of tasks completed with or without assistance ● Count the number of times a user searches for assistance

Research Question:	How easily can users find the training videos?
Associated Tasks:	<ul style="list-style-type: none"> ● Find the training videos
Collected Data:	<ul style="list-style-type: none"> ● Time spent trying to find the training videos ● Count whether the user can successfully complete the task ● User Comments

Research Question:	When the users read error feedback are they able to finish the task they are attempting? How often did this occur?
Associated Tasks:	<ul style="list-style-type: none"> ● Register for the site ● Find the training videos ● Complete the Volunteer Standards of Conduct Training ● Complete the Volunteer Agreement ● Complete the Intake/Interview and Quality Review Training PowerPoint
Collected Data:	<ul style="list-style-type: none"> ● Time spent reading errors ● User Comments ● Count the number of tasks complete/incomplete involving error messages

Research Question:	After using the Ladder Up website, would users recommend the service to a friend?
Associated Tasks:	<ul style="list-style-type: none"> ● Register for the site ● Find the training videos ● Complete the Volunteer Standards of Conduct Training ● Complete the Volunteer Agreement ● Complete the Intake/Interview and Quality Review Training PowerPoint
Collected Data:	<ul style="list-style-type: none"> ● User Comments ● User's rating of their likelihood to recommend the site on a Likert Scale

Research Question:	Is the user aware that they have completed each phase of the training?
Associated Tasks:	<ul style="list-style-type: none"> ● Register for the site ● Find the training videos ● Complete the Volunteer Standards of Conduct Training ● Complete the Volunteer Agreement ● Complete the Intake/Interview and Quality Review Training PowerPoint
Collected Data:	<ul style="list-style-type: none"> ● User Comments, including verbally stating "Complete" at the end of each task ● User's rating of the usefulness of feedback on a Likert Scale

User Profile

For our usability test, we recruited participants who possessed basic knowledge of web controls. This included but was not limited to radio buttons, dropdown menus, and web forms. The Ladder Up organization generally recruits volunteers from various corporations, consultancies, financial services companies, and law firms. They also recruit students and faculty members from DePaul University. We assumed that this volunteer population has access to a computer and an Internet connection. We further assumed that they have the required skills to complete an on-site registration and need no training.

Test Design (Method)

For our test we used the Within-Subject Design. Each participant attempted each task, and each participant was given their tasks in the same order. We

encouraged participants to attempt to complete each task in spite of errors until they completed the task or until they spent ten minutes attempting to complete the task.

Test Procedure

Greeting: The moderator greeted the the test subjects in the lobby of the Depaul CDM building. The moderator escorted each test subject to room 805. Once in the room, the test proctor introduced the participant to the team.

Testing: The moderator thanked the subject for participating. They then requested that the participant fill out the consent form. The moderator read from a script. They then asked the subject to perform the outlined tasks to obtain data. Other team members collected timestamped error data and user reactions. Morae software captured the user's actions on-screen. If the participant encountered an issue that impeded their progress after two minutes of attempting a task, the proctor assisted the subject. The test was slated to end after 30 minutes, even if the participant had not completed the tasks; however, this was never needed.

Closing: After the participants completed their tasks, the moderator administered the post-test questionnaire. They then thanked the subject for their time and accompanied them out of the room.

Task List

Users attempted each of the following tasks:

Task 1: Register for the site

Users must register for the site using credentials supplied by the research team. This task begins with the user on Ladder Up's external site home page (goladderup.org). The task ends when users have successfully registered for an account. They then gain access to the Ladder Up Volunteer microsite. This task comes first because it is how users would naturally experience the site. This task allows us to observe the system's forms and feedback.

Task 2: Find the training videos

Users must find and display the Ladder Up Quality Reviewer Training and Tax Preparation Training Courses & CTEC School - Schedule A videos. This task begins with users logged in and on the home page. This task is complete when the participant has displayed both videos on their screen. This task comes second because the Ladder Up leadership wants to know whether users can find them and use them for training. This task allows us to evaluate whether users can find the

training videos.

Task 3: Complete the Volunteer Standards of Conduct Training

Users must review the Volunteer Standards of Conduct Training PDF document. They must then complete the associated test which acknowledges that they reviewed the training. This task begins with the user logged into the Volunteer microsite and on the home page. The task is complete when the system acknowledges that step 01 is complete. The corresponding indicator will turn from red to green. This is a typical first step for users beginning their training. It is natural that this task occurs after the user registers and views the training videos. This task allows us to observe the user interacting with the microsite's navigation, forms, and feedback.

Task 4: Complete the Volunteer Agreement

Users must read the Volunteer Agreement. They must then acknowledge that they read it, fill out the associated form, and click submit. This task begins with the user logged into the training site and on the Volunteer Standards of Conduct Training page. This task is complete when the system acknowledges that step 02 is complete. The corresponding indicator turns from red to green. This task is fourth because later steps require it, and because the system directs users to complete it in this order. This task allows us to observe the navigation, forms, and feedback.

Task 5: Review the Intake/Interview and Quality Review Training PowerPoint

Users must read the Intake/Quality Review Process PDF document, enter their name, and check a radio button acknowledging that they read the document. This task begins with the user logged in and on the Volunteer Agreement page. This task is complete when the system acknowledges that step 05 is complete and the corresponding indicator turns from red to green. This task comes last because the system directs users to complete it in this order. This task allows us to observe the navigation, forms, and feedback.

Test environment and equipment

We conducted the usability test at DePaul University's Loop location, in the College of Computing and Digital Media building - room 805. The usability lab is a controlled, quiet room which enabled us to minimize any potential distractions for our test users.

The lab has a test participant console, which includes an iMac, equipped with a high-speed Internet connection. It also has Morae software, with which we recorded the test participant's on-screen actions when interacting with the Ladder Up microsite. The lab also features an observer's console, outfitted with another desktop computer, an Internet connection and Morae software. Team members

not moderating the test staffed this console and collected data while observing the test.

For group members observing the test, the required equipment included a stopwatch, as well as a writing utensil to capture and document usability findings on the corresponding data log sheets. Lastly, we used a screen recorder to create a set of recordings for backup.

Test Monitor Role (including interaction policies)

The moderator plays several roles in the usability study. They ensure that the study is on schedule, guide the participants through the tasks, and assist in helping the participant feel comfortable.

In addition, the moderator needed to observe and remember certain behaviors and comments to delve deeper into the participants experience when working through tasks.

Some explicit interaction policies:

- Create a relationship where the participant is the evaluator and the moderator is the apprentice.
- Allow time for participants to work through tasks.
- If the participant becomes frustrated and wants to abandon a task, say to the participant, “I see you are having a difficult time with this. Would you please continue for five more minutes?” Encourage the participant to continue with the task at hand. Say to the participant, “I appreciate you attempting to continue and complete the task.”
- Allow user participants to express their feelings and frustrations.
- Use a warm, friendly, and calm demeanor to make the participants feel at ease.
- Try to remain neutral and not overreact or jump to any conclusions.
- Encourage the participants to vocalize what is happening.
- Probe and understand why the user took a different approach to a specific task when applicable.
- Avoid providing cues as to how to complete a task.
- Avoid discussions that steer away from the topic.

Results

Research Question:	Are users able to find the Registration form from the organization's main website (goladderup.org)?
Results	
Task Completion:	<ul style="list-style-type: none">● 8 of 8 users successfully found the Registration form
Verbal User Comments:	<ul style="list-style-type: none">● "Get involved would be a place where it seems I would be drawn towards for registering."● "There isn't a link or callout for registration."
Other Results:	<ul style="list-style-type: none">● 1/8 users first looked for the Registration form within the site's "Get Involved" dropdown menu.

Research Question:	How many errors does the user make when filling out Registration form on the site?
Results	

Task Completion:	<ul style="list-style-type: none"> ● 8 of 8 users successfully completed the Registration form
Median Task Completion Time:	<ul style="list-style-type: none"> ● 0:05:08
Verbal User Comments:	<ul style="list-style-type: none"> ● “I always do appreciate when I am able to skip some things.” ● “Wow. It’s a long process.” ● “It seemed the system logged me in automatically after I registered. I don’t have to enter my email or password again, so that’s nice.” ● “I would say, maybe something that’s put in is an optional idea for other languages. Spanish, Chinese, Polish are very generic.”
Other Results:	<ul style="list-style-type: none"> ● 2 of 8 users experienced difficulty selecting “DePaul University” from the Organizational Affiliation dropdown menu. ● 1 of 8 users struggled to understand what constitutes a “main address”. ● 2 of 8 users denoted that only one phone number was required, but there were asterisks for all three phone number text fields (cell phone, work phone, home phone).

NOTE: The following Research Questions have been grouped as together they largely account for providing insight into the microsite’s feedback mechanisms and overall user cognition of successful task completion.

Research Question:	Do users ever encounter steps in the training process where it is not clear how to proceed? What help did the system provide?
Research Question:	When the users read error feedback are they able to finish the task they are attempting? How often did this occur?
Research Question:	Is the user aware that they have completed each phase of the training?
Results	

<p>Task Completion:</p>	<ul style="list-style-type: none"> ● 3 of 8 users successfully completed the Volunteer Standards of Conduct Training. ● 8 of 8 users successfully completed the Volunteer Agreement. ● 7 of 8 users successfully completed the Intake/Interview & Volunteer Training PowerPoint.
<p>Median Task Completion Time:</p>	<ul style="list-style-type: none"> ● 00:04:20 - Volunteer Standards of Conduct Training ● 00:01:49 - Volunteer Agreement ● 00:01:40 - Intake/Interview and Volunteer Training PowerPoint
<p>Verbal User Comments:</p>	<ul style="list-style-type: none"> ● “I would assume the test is part of the training, but it doesn’t look like it is, because all you have to do is select a radio button to say you completed the Volunteer Standards of Conduct.” ● “So, I thought I was done, because I saw the submit button. I didn’t realize there were more. I am not sure if I should move on to the second half of this because they look like a whole new set of questions.” <i>(speaking about completing the Volunteer Standard of Conduct Training)</i> ● “I feel because I filled out the initial form, I should already have that information.” <i>(speaking about completing the Volunteer Agreement form fields)</i> ● “This is the second time I had to put in my own city and address. Maybe it should auto populate so I don’t have to do this again and again. I am a volunteer and I have already put so much work, and have been tested, and I haven’t even able to help people yet.” <i>(speaking about completing the Volunteer Agreement form fields)</i> ● “I am wondering if there is any validation. I can’t tell from this form, which ones are required and which ones are optional.” <i>(speaking about completing the Volunteer Agreement form fields)</i> ● “That’s awesome; they don’t give you any feedback

	<p>when you submit.” <i>(speaking about completing the Intake/Interview & Quality Review Training PowerPoint)</i></p> <ul style="list-style-type: none"> ● “After I click submit, I am looking for a successful confirmation. There is no feedback here.” <i>(speaking about completing the Intake/Interview & Quality Review Training PowerPoint)</i> ● “Clicking again, because I don’t know if it went through.” <i>(speaking about completing the Intake/Interview & Quality Review Training PowerPoint)</i>
<p>Other Results:</p>	<ul style="list-style-type: none"> ● 2 of 8 users did not download the Volunteer Standards of Conduct Training PowerPoint prior to proceeding through the test. ● 5 of 8 users were confused about how to proceed through the Volunteer Standards of Conduct Training page as it is divided up into two sections (Volunteer Standards of Conduct PowerPoint first, followed by the Volunteer Standards of Conduct Test). ● 2 of 8 users experienced difficulty navigating back to the volunteer microsite after downloading the Intake/Quality Review Process Overview due to the fact that the link is not programmed to open in a new browser window or tab.

<p>Research Question:</p>	<p>How easily can users find the training videos?</p>
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Results

Task Completion:	<ul style="list-style-type: none"> 3 of 8 users successfully found <i>both</i> training videos: <ul style="list-style-type: none"> Ladder Up Quality Reviewer Training Video Tax Preparation Training Courses & CTEC School - Schedule A Video
Median Task Completion Time:	<ul style="list-style-type: none"> 00:00:41
Other Results:	<ul style="list-style-type: none"> 8 of 8 users found at least one training video 2 of 8 users found the training videos by utilizing the main navigation bar and clicking on “Volunteer Resources” 6 of 8 users found the training videos simply by locating them at the bottom right-hand corner of the microsite’s homepage

Research Question: After using the Ladder Up website, would users recommend the service to a friend?

From Post-Test Questionnaire

Based on your interaction with the Ladder Up volunteer microsite today, I would be likely to encourage a friend, family member, or colleague to volunteer for the organization.

Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Total Responses	Mean
1	1	4	2	0	8	2.88

Full Post-Test Questionnaire Results

Overall, I found the Ladder Up microsite easy to use.

Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Total Responses	Mean
0	3	2	1	2	8	3.25

Site navigation was intuitive.

Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Total Responses	Mean
0	4	1	3	0	8	2.88

I felt as though I could use the Ladder Up microsite without written instructions.

Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Total Responses	Mean
0	1	3	1	3	8	3.75

On-site feedback (such as error messages, instructional copy, and iconography) felt useful and helped guide me through the microsite.

Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Total Responses	Mean
1	4	2	1	0	8	2.38

Interacting with the microsite bolstered my overarching opinion of Ladder Up as an organization.

Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Total Responses	Mean
1	2	2	2	1	8	3.00

Most positive aspects of the interface:

- “Very clean interface, follows the conventions I am used to on a modern website.”
- “The step callouts were helpful, but domineering (the sidebar steps).”
- “The pass and fail icons are obvious.”
- “Clearly lists the steps I need to complete to become a volunteer.”
- “Left nav in later tasks.”
- “The website was intuitive.”
- “Clearly stated what the company does, all links worked, sleek website, no ads, felt like a good organization.”

Most negative aspects of the interface:

- “Too much content, not a clear information architecture, very visually unappealing, poor systems feedback when dealing with forms.”
- “I felt the navigation was confusing. I can’t figure out which page I am on.”
- “Form user interface design is not consistent.”
- “Looking for more feedback when I finish one task.”
- “Navigation wasn’t intuitive.”
- “Unclear whether info was submitted/confirmed.”
- “Too many words!”
- “The submit buttons were placed in odd places on the website.”
- “Some of the process wasn’t straightforward, like finding the PowerPoints.”

Additional Results

- One user remarked that it would be helpful if radio button text labels were programmed so that when the user clicks the text itself the state of the radio button would also change (selected/unselected).
- Within the Volunteer Agreement section of the microsite, one user was able to successfully submit their information through the text fields despite not selecting the radio button correlating with, “By checking this box, I declare that I have completed the Volunteer Standards of Conduct Training and have read, understand, and will comply with the volunteer standards of conduct.”
- 3 of 8 participants expressed concern about the sheer amount of content needing to be read through within the PowerPoint training documents.
- During registration, one user missed selecting their prefix from the associated dropdown menu (this also occurred with the user in our pilot test [*pilot test results otherwise excluded for the purposes of this report*]). Despite completing the registration task correctly, two additional users verbally remarked that requiring prefix information within a registration form seemed unnecessary.

Findings and Recommendations

Task 1	
Please register for the Ladder Up site and state “complete” after you have finished the task.	
Finding	Recommendation
<p>Signing up for the microsite was a relatively well designed feature of the website, however there are a few problems. All of the users were able to complete this task, but they encountered complications. For example, two of the eight participants had issues with the Organization Affiliation dropdown menu. They were unable to find DePaul University easily, but scrolled by it several times. Also, two of the eight participants were confused by the form instruction “At least one phone number is required”, as all three phone options are tagged with asterisks denoting required. One user commented that they are normally able to select radio buttons by clicking on the menu item, rather than directly on the radio button itself.</p>	<p>Fix the small issues with the form. Give the Organization Affiliation box more height so people can see more items in the box at a time. This would help users orient themselves on the list and make scrolling through the items within easier. Also, either choose to remove the asterisks next to all but one of the phone numbers or remove the instruction that only one is required. Further, allow radio button text to act as triggers for selecting the radio buttons. This is consistent with standard web controls, and the larger target for clicking will help users fill in their information with fewer errors. These are both high priority recommendations because of the ease by which the fixes can be implemented. <i>(See Figure 1 for further explanation.)</i></p>
<p>The registration form is too long. A number of participants commented on either the length of the form or items they felt were unnecessary. For example, one participant said, “Wow. It’s a long process.” Participant 2 said, “It’s a little weird that they need your prefix, but if they are trying to be formal...” Participant 8 said, “That is weird, why is there my business address and my company address? Just a little confusing...”</p>	<p>Consider shortening the registration form. Since you ask for user information later in the process during the Volunteer Agreement, it would make sense to offload some of the information gathering until that step, once users are a little more committed. Asking for all of this information up front can feel like a barrier and cause users who are minimally interested to balk at proceeding. This recommendation is a medium priority. We feel that it is necessary for the users, but acknowledge</p>

there there may be business reasons justifying the current form design.



Task 2

Your friend also mentioned that there were videos they found which helped them understand what they must do to volunteer. Find those videos and display them on the screen and state “complete” after you have finished the task.

Finding	Recommendation
<p>The Videos are findable, but they don't encourage watching. Only three of the eight users opened both videos. Some users found them right on the Volunteer Home Page and some went through the Volunteer Resources Page. The fact that the users did not open the second video, even though we specifically asked for them to display both videos indicates an issue with the site. We feel that because the videos open in a new tab that it interrupts the flow of the user.</p>	<p>Embed the videos directly into the page (see Figure 2, below). In this way, even when merely scanning the site users will recognize the thumbnails as videos, as opposed to the mystery of a plain link. When users are done watching the first video, they will be ready to watch the second video immediately afterward. Users will still be able to open the videos in a new tab or window if they need to use any of YouTube's advanced features. This is a medium priority fix, since it is not a required step to complete the on-site training process, but yet should still be easy to implement.</p>

Figure 2. Embed the training videos directly in the page to encourage user action.



Task 3

Please complete the Volunteer Standards of Conduct Training and state “complete” after you have finished the task.

Finding	Recommendation
<p>The Volunteer Standards of Conduct Training does not provide clear instructions as to how to take the test or how long the test will take. Users assume that by selecting the radio button, downloading the PowerPoint, and clicking submit, that the first part of the training is complete.</p>	<p>Provide better instructions clearly explaining that the “Volunteer Standards of Conduct Training” is the instruction guide for the test. State the approximate time the test will take as well as what happens when the test is completed. For example, a green checkmark will appear on the left-rail of the navigation if the users pass the test. On the other hand, if users fail, give the users feedback that the test must be retaken again in order to proceed to the next level. This is a high priority recommendation, since it’s a required step to complete the training process and something that multiple users struggled with in testing.</p>

Task 3, continued

Please complete the Volunteer Standards of Conduct Training and state “complete” after you have finished the task.

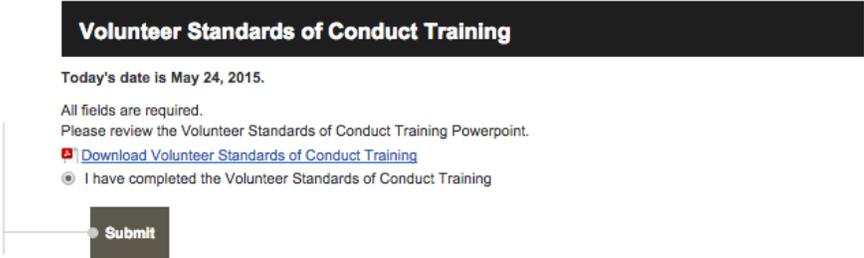
Finding	Recommendation
<p>“Volunteer Standards of Conduct Training” PowerPoint opens in a new tab forcing users to switch back and forth between the “Volunteer Standards of Conduct Training” tab and the “Volunteer Standards of Conduct Test” tab. All of the users commented that the PowerPoint presentation contained a considerable amount of information as well as the fact that the information isn’t easy to scan through. In fact, 1 of 8 users could not find the correct answer even when they used the CTRL + F (find) shortcut in the PowerPoint and thus instead simply guessed the best answer based upon common sense.</p>	<p>The short-term recommendation: Provide clear instructions for the “Volunteer Standards of Conduct Training.” Explain how “Volunteer Standards of Conduct Training” will help answer the questions for the “Volunteer Standards of Conduct Test.” This is a high priority recommendation, since it’s just providing additional instructions before users take the test. Also, review the “Volunteer Standards of Conduct Training” PowerPoint to make sure users can find the correct answers to test questions.</p> <p>The long-term recommendation: Consider including “Volunteer Standards of Conduct Training” within the website versus opening a PowerPoint to avoid making users switch back and forth between tabs. This will increase test efficiency and productivity, and will moreover prevent users from either abandoning the task or accidentally dismissing the PowerPoint.</p>

Task 3, continued

Please complete the Volunteer Standards of Conduct Training and state “complete” after you have finished the task.

Finding	Recommendation
<p>The system does not provide any feedback after hitting the first “Submit” button for “Volunteer Standards of Conduct Training”. In fact, 3 out of 8 participants clicked the “Submit” button expecting something to happen. One participant did not click submit for the Volunteer Standards of Conduct Test. The user scrolled back up and clicked the first “Submit” button for Volunteer Standards of Conduct Training. No feedback was provided to the user and the task was not completed since the user clicked the wrong button.</p>	<p>Avoid errors and confusion by removing the first “Submit” button. Have one button as the final submission. This is a high priority recommendation considering the site doesn’t provide immediate feedback indicating the process has been successfully completed. In addition, having two “Submit” buttons causes users to click on the wrong button, because the two buttons have the same label. <i>See Figure 3 for a further explanation.</i></p>
<p>When users either pass or fail the test, there is no feedback provided to let the users to know which questions were answered incorrectly.</p>	<p>Provide informative feedback to the questions users answered incorrectly. In order to improve exam performance and gain a better understanding of the “Volunteer Standards of Conduct Training” guide, users must be able to see what they answered wrong. This is a medium priority recommendation.</p>

Figure 3. Avoid errors and confusion by removing the first “Submit” button.



Task 3, continued	
Please complete the Volunteer Standards of Conduct Training and state “complete” after you have finished the task.	
Finding	Recommendation
<p>If a user fails the test, the old test appears at the bottom of the screen. One participant appeared confused when the old test reappeared. The user assumed it was another set of questions that needed to be completed. It is confusing as to why the old test reappears, since it doesn’t provide users feedback on questions that were answered correctly.</p>	<p>Remove the old test and provide feedback on the questions that were incorrectly answered. The user would then know how to apply their new knowledge for the retake test. This a high priority recommendation, since it disrupts users from proceeding with the task flow. <i>See Figure 4 for further explanation.</i></p>
<p>If users accidentally missed an answer on the “Volunteer Standards of Conduct Test”, the system doesn’t provide users with a warning that they have blank answers.</p>	<p>Include form validation to point out to users that something was missed. For example, if the radio button for the “Volunteer Standards of Conduct Training” wasn’t selected, the system would provide an alert to the user to take action immediately. This a high priority recommendation to prevent users from making any errors or missing any fields. Include a confirmation dialog after users submit the exam such as, “Thank you. You have successfully completed the Volunteer Standards</p>

of Conduct Test” or “Please correct the indicated errors.”

Figure 4. The last question of the retake test.

Explaining the intake/interview and quality review process is important so the taxpayer understands they are expected to:

- 10. Have a completed 13614-C prior to having the return prepared
- Answer the tax preparer’s additional questions during the interview
- Participate in the quality review of their tax return
- All of the above

Submit

Volunteers Standards of Conduct Test - Enter Your Answers

Which of the following is a violation of the Volunteer Standards of Conduct?

- 1. Knowingly preparing a false tax return
- Having a donation/tip jar in the taxpayer waiting area at the site
- Using taxpayer’s personal information to ask for a date
- All of the above

Which volunteers must take Volunteer Standards of Conduct training and test?

- 2. Site Coordinators/Local Coordinators
- Quality Reviewers and tax return preparers
- Greeters
- All VITA/TCE volunteers

Remove the old test to avoid confusion.

Task 4

Please Complete the Volunteer Agreement and state “complete” after you have finished the task.

Finding	Recommendation
<p>The submit button does not produce clear feedback to aid the user in knowing they have finished the Volunteer Agreement.</p>	<p>Replacing the text fields with a signature validation checkbox would provide a more efficient confirmation that the new volunteer has read the relevant training information. Removing the redundant personal information fields decreases the user’s cognitive taxation and should increase the percentage of completed registrations, which would in turn have the potential to increase the pool of volunteer applications. This a high priority recommendation since the users do not know if they have completed the task and which ultimately hinders their ability to move forward through the process.</p>

<p>Participants found questions “Number of years volunteered (including this year):” and “Volunteer position(s):” to be confusing and unclear.</p>	<p>“Volunteered” and “Volunteer positions” both need some context or framework to help understand Ladder Up’s descriptions. Because there are no clear parameters of what constitutes a credible volunteer position and the number of years volunteering, the answers supplied by participants were vague and inconsistent. These issues can be improved by asking these questions during the in-person application process. Asking during the in-person application process will create a dialogue which may help the organization find the best possible position for the new volunteer. This is a medium priority recommendation because the dialogue with the volunteer most likely will occur during the in person process.</p>
<p>Participants felt that the Volunteer Agreement fields were redundant. The Ladder Up microsite currently asks for information that the user has already provided in the registration form, including Volunteer’s Name, Personal Address, and Phone Number.</p>	<p>Create a salient completion statement box close to the submit button. Use text explaining to the user that they have successfully completed the agreement. There should also be corresponding on-site feedback indicating that the process has successfully been completed. This is a high priority recommendation as it is somewhat easily implemented on the backend, and as it is something that was mentioned by multiple usability test participants. See <i>Figure 5, below</i>.</p>

Figure 5. Replace the redundant text fields with auto filling fields. Change the Radio Button to checkbox.

By checking this box, I declare that I have completed Volunteer Standards of Conduct Training and have read, understand, and will comply with the volunteer standards of conduct.

Full Name:
Nathan Petts

Home street address: City, state and ZIP code
Chicago, IL
60640

Email address:
nbpetts

Daytime telephone:
734259042

Task 5	
Please review and complete the Intake/Interview & Quality Review Training PowerPoint and state “complete” after you have finished the task.	
Finding	Recommendation
<p>The Ladder Up site presents a lot of content in very large chunks. This is typified by many participants expressing (verbally and in the post-test questionnaire) that they thought both training PowerPoint presentations to be too lengthy.</p>	<p>Slimming down the Intake/Interview and Quality Review Training PowerPoint content will create a leaner, streamlined step. In turn, this should help the site be friendlier to users and increase the percentage of completed registrations, ideally growing the pool of candidates to choose from. This is a medium priority recommendation as it is a difficult task and will take skill to achieve.</p>
<p>Participants found the lack of prominent on-site feedback confusing. The confirmation of the completed task is in the left hand side of the page; however, it seems to be too far out of the user’s field of view to be noticeable.</p> <p>The green check in the left side</p>	<p>Provide feedback to the user when they have confirmed their training. Create a salient completion statement box close to the submit button with text explaining to the user that they have successfully completed the agreement. <i>See Figure 6, below.</i> This is a high priority, because</p>

navigation bar is a good indication of completed set within the whole process, but after hitting the submit button the feedback is not clear.

users were unclear about the results of their actions.

Intake/Interview & Quality Review Training Powerpoint

Today's date is May 24, 2015.

All fields are required.

Name of Attendee:

Viviana Anaya

Please review the Intake/Quality Review Process Overview Powerpoint.

[Download Intake/Quality Review Process Overview](#)

I have reviewed the Intake/Interview & Quality Review Training Powerpoint.

Submit

Thank you. Your application has been submitted.

Figure 6.
Create a feedback box after the submit button has been pressed.

Appendix

Contents
Raw Usability Test Data <ul style="list-style-type: none">• Participant Videos• Usability Test Plan• Timesheets• Rough Findings
Script
Checklists
Post-Test Questionnaire
Consent & Recording Release Form
Data Log Sheets
Data Collection Form
Detailed Task Lists

Raw Usability Test Data

Please see this link for our usability test data in full, including videos of all 8 users participating in the test.

<https://app.box.com/s/iuw25fauq2vm8kys0ql5h5wyuovuesxy>

Script

Hello [Name of the participant], thank you for agreeing to participate in this study.

My name is [name], and I'll be overseeing this session with you today.

[Introduce observers if they are in the same room.]

My colleagues will also help me take notes as well as observe your interactions with the site.

[_____], *will be managing the recordings.*

[_____], *will be keeping track of time.*

[_____], *will be taking notes.*

During the session, I will be using a script to ensure that my instructions are the same for everyone.

Today, we are asking you to serve as an evaluator of the website, Ladder Up. The goal of the study is to determine the difficulty of the on-site training and certification process. Please remember that you are helping us test the website rather than us testing your abilities. Please also remember that we did not create this interface, so do not feel as though your feedback will offend us in any way.

I will be asking you to complete a set of task scenarios on the computer and I will observe how you use the website. After you have finish each task, please clearly state that you have completed the task by saying "complete".

With your permission, we're going to record what happens on the screen and our conversation for future reference if needed.

Please try to think out loud during the entire study. Share whatever is going through your mind. For example, if you don't know what something is, please say, 'I don't know what this is for.' Verbally express to me what your actual thoughts are, what you are looking at on the screen, and what your likes or dislikes are.

Today's session will last approximately 15 minutes. If you have any questions as we go along, please feel free to ask them. If you need to take a break at any

point, just let me know.

[Handover the consent form to the participant.]

Before we start, please fill out the consent and release form.

[Task Session Begins.]

Okay, let's begin.

[Read the task scenario to the participant.]

Suppose you were looking to volunteer. A friend of yours suggested this organization, Ladder Up, as an organization you should check out. You learned that Ladder Up provides free tax services and it seems like something that you would like to help with. Your friend also told you a bit about their experience with Ladder Up. They said that you have to attend a live training session prior to being a volunteer, but that you can complete some of the training online. You thought now would be a good time to look into that. You know you must now register for the site and log in to begin your on-site volunteer training process. Please register for Ladder Up and login. Then, complete all of the training you can, up to the point where you must attend the live training. Also, please remember to think aloud as you complete the task and please say "complete" to let me know when you are done. Do you have any questions for me before you begin?

[Handover the first task to the participant and read the task to the participant]

I will read the tasks out loud and then go ahead and do what it says. Don't worry about the task numbers, they are just so we can keep the data straight.

Task 1: Please register for the Ladder Up site and state "complete" after you have finished the task.

[After first task] Thank you. Now let's move on to the next task.

[Handover the second task to the participant and read the task to the participant]

Task 2: Your friend also mentioned that there were videos they found which helped them understand what they must do to volunteer. Find those videos and display them on the screen and state "complete" after you have finished the task.

[After second task] Thank you. Now let's move on to the next task.

[Handover the third task to the participant and read the task to the participant]

Task 3: Please complete the Volunteer Standards of Conduct Training and state “complete” after you have finished the task.

[After third task] Thank you. Now let’s move on to the next task.

[Handover the fourth task to the participant and read the task to the participant]

Task 4: Please Complete the Volunteer Agreement and state “complete” after you have finished the task.

[After fourth task] Thank you. Now let’s move on to the next task.

Task 5: Please review and complete the Intake/Interview & Quality Review Training PowerPoint and state “complete” after you have finished the task.

[After the entire task] Thank you. Your participation has been very helpful. Do you have any questions for me?

[Administer post-test questionnaire]

Please complete this brief questionnaire to capture some additional feedback now that you have completed today’s testing. While you are working on the questionnaire, I am going to check with my colleagues to see if there are any outstanding items we need clarification on.

[Consult with group members]

Okay, we’re done. Thank you once again for your participation.

Checklists

Equipment

- Test Plan
- Recording Equipment
- Pencils
- Consent Forms
- Note paper
- Data Logging Sheets
- Post-test Questionnaire
- Participant Tasks
- Login Credentials
- Test Answers
- Batteries

Setup

- Screen set
 - Browser open on www.goladderup.org - Not Logged In
 - Browser open on www.goladderup.org - Logged into an account with tasks available.
 - Remove all sessions from the account.
- Recording equipment on
- Number lock on
- Paperwork ready for participant
 - Consent Form
 - Participant Tasks
 - Post-test Questionnaire
 - Login Credentials
 - Test Answers

Post-Test Questionnaire

Thank you for participating in our usability study today. Please answer the following questions prior to your departure.

Participant Name: _____

Date: ____ / ____ / ____

1. Overall, I found the Ladder Up microsite easy to use.

1	2	3	4	5
<i>strongly disagree</i>		<i>neither agree nor disagree</i>		
<i>strongly agree</i>				

2. Site navigation was intuitive.

1	2	3	4	5
<i>strongly disagree</i>		<i>neither agree nor disagree</i>		
<i>strongly agree</i>				

3. I felt as though I could use the Ladder Up microsite without written instructions.

1	2	3	4	5
<i>strongly disagree</i>		<i>neither agree nor disagree</i>		
<i>strongly agree</i>				

4. On-site feedback (such as error messages, instructional copy, and iconography) felt useful and helped guide me through the microsite.

1	2	3	4	5
---	---	---	---	---

strongly disagree
strongly agree

neither agree nor disagree

5. Based upon your interaction with the Ladder Up volunteer microsite today, I would be likely to encourage a friend, family member, or colleague to volunteer for the organization.

1 2 3 4 5
strongly disagree *neither agree nor disagree*
strongly agree

6. Interacting with the microsite bolstered my overarching opinion of Ladder Up as an organization.

1 2 3 4 5
strongly disagree *neither agree nor disagree*
strongly agree

7. Please list the most **negative** aspect of the interface and why.

8. Please list the most **positive** aspect of the interface and why.

Consent & Recording Release Form

I agree to participate in the study conducted and recorded by DePaul University (HCI 460 students: Anaya, Burke, Petts, Wygonik) and the Ladder Up organization (goladderup.org).

I understand and consent to the use and release of the recording by DePaul University and the Ladder Up organization. I understand that the information and recording is for research purposes only and that my name and image will not be used for any other purpose. I relinquish any rights to the recording and understand the recording may be copied and used by DePaul University and the Ladder Up organization without further permission.

I understand that participation in this usability study is voluntary and I agree to immediately raise any concerns or areas of discomfort during the session with the study administrator.

Please sign below to indicate that you have read and you understand the information on this form and that any questions you might have about the session have been answered.

Date: _____

Please print your name: _____

Please sign your name: _____

Thank you!

We appreciate your participation.

Data Log Sheets

The coding schemes consist of one- or two-letter codes and each letter represents, and events that might occur during the usability test. The codes must be remembered in order for the logger to quickly input data when the evaluation is taking place. By anticipating the type of data required, the logger will be able to capture other details of the test and probe deeper into the participant's behavior.

Type	Definition
B	Bug
BB	Back button
C	Click
CS	Completed successfully
E	Errors
ET	End Task
F	Facial reaction (e.g. surprise)
G	Gives up or wrongly thinks finished
H	Help (participant ask for help)
IMP	Impatience
M	Misc. (general observation by logger)
N	Negative opinion
P	Positive opinion
RA	Random actions
S	Submit
SF	Searches for function (not being to able to locate a specific function)
ST	Starts task

UC	User comments
V	Video highlight - an “Ah-ha!” moment
UG	Unachieved goal (goal that cannot be achieved)
X	Incorrect Action

Data Collection Form

Participant:		Date:	Time:
<i>Task</i>	<i>Issues</i>	<i>Observations, Comments & Notes</i>	<i>Time Spent</i>

--	--	--	--

Detailed Task Lists

Task Scenario

Read to the participant: Suppose you were looking to volunteer. A friend of yours suggested this organization, Ladder Up, as an organization you should check out. You learned that Ladder Up provides free tax services and it seems like something that you would like to help with. Your friend also told you a bit about their experience with Ladder Up. They said that you have to attend a live training session prior to being a volunteer, but that you can complete some of the training online. You thought now would be a good time to look into that. You know you must now register for the site and log in to begin your on-site volunteer training process. Please register for Ladder Up and login. Then, complete all of the training you can, up to the point where you must attend the live training. Also, please remember to think aloud as you complete the task. Do you have any questions for me before you begin?

Task 1: Register for the site

Participant's Screen: Browser open, to www.goladderup.org

Required to perform:

- Fill out the TAP Volunteer Registration form
- Submit the form
- Log in

Task Complete State: User registers and is logs in. The screen is on the volunteer home page.

Task Completed: Yes No

Time Spent on Task:

Task 2: Find the training videos

Read to the participant: Your friend also mentioned that there were videos they found which helped them understand what they must do to volunteer. Find those videos and display them on the screen.

Participant's Screen: Browser open, Participant logged on to the training site and on the Volunteer login home page or the Intake/Interview & Quality Review Training page

Required to perform:

- Navigate to the Volunteer Resources page or the Volunteer Home page
- Locate the video link
- Click the video link of the Ladder Up Quality Reviewer Training Video
- Click the video link of the Tax Preparation Training Courses & CTEC School - Schedule A
- Read the Intake/Interview & Quality Review Training Powerpoint
- Mark the acknowledgement that the participant has read the Intake/Interview & Quality Review Training Powerpoint
- Fill in their name
- Submit the form

Task Complete State: User finds videos and displays them on their screen.

Task Completed: Yes No

Time Spent on Task:

Task 3: Complete the Volunteer Standards of Conduct Training

Read to the Participant: Please complete the Volunteer Standards of Conduct Training and state “complete” after you have finished the task.

Participant’s Screen: Browser open, Participant logged on to the training site and on the Volunteer login home page

Required to perform:

- Navigate to the Volunteer Standards of Conduct Training page
- Download the Volunteer Standards of Conduct Training PDF document
- Read the Volunteer Standards of Conduct Training
- Mark the acknowledgement that the participant has read the Volunteer Standards of Conduct Training
- Submit the form
- Take the test
- Submit the test

Task Complete State: Volunteer Standards of Conduct Training arrow is green or has a green check mark

Task Completed: Yes No

Time Spent on Task:

Task 4: Complete the Volunteer Agreement

Read to the Participant: Please Complete the Volunteer Agreement and state “complete” after you have finished the task.

Participant’s Screen: Browser open, Participant logged on to the training site and on the Volunteer login home page or the Volunteer Standards of Conduct Training page

Required to perform:

- Navigate to the Volunteer Agreement page
- Read the Volunteer Agreement page
- Mark the acknowledgement that the participant has read the Volunteer Agreement
- Fill out the remainder of the form
- Submit the form

Task Complete State: Complete Volunteer Agreement arrow is green or has a green check mark

Task Completed: Yes No

Time Spent on Task:

Task 5: Complete the Intake/Interview & Quality Review Training PowerPoint

Read to the Participant: Please review and complete the Intake/Interview & Quality Review Training PowerPoint and state “complete” after you have finished the task.

Participant’s Screen: Browser open, Participant logged on to the training site and on the Volunteer login home page

Required to perform:

- Navigate to the Intake/Interview & Quality Review Training PowerPoint
- Download the Intake/Interview & Quality Review Training PowerPoint
- Read the Intake/Interview & Quality Review Training PowerPoint
- Mark the acknowledgement that the participant has read the Intake/Interview & Quality Review Training PowerPoint
- Fill in their name
- Submit the form

Task Complete State: Intake & Quality Review Training PowerPoint arrow is green or has a green check mark

Task Completed: Yes No

Time Spent on Task: