V12 Design Approach

myIR v12 Functional Definition

Introduction and Context

Purpose of this presentation

- Provide BT LT with an overview of the proposed myIR design approach for V12
- Show how the design approach relates to and is supported by customer testing and business engagement activities
- Give an overview of the scope of design work related to the myIR V12 upgrade

Background

Customer testing of myIR V12 started in January 2020 and was followed by an analysis of the expected change impact on critical myIR user groups. Based on the positive outcome of this analysis a recommendation to proceed with the upgrade was endorsed by the TEWC in July 2020. In endorsing the recommendation and in recognition of the extensive scope of the changes, the TEWC requested that BT proactively engage with customers and the wider organisation to validate design and prepare the user community for the upgrade.

Work has begun on a unified plan that integrates the design approach with customer and business engagement activities and supports the change management activities associated with the transition to myIR V12. The high-level plan in this presentation sets out the sequencing of various design tasks and the dependencies between these and different customer testing activities.

The presentation includes:

- Scope of myIR V12 design activities
- Categorisation of in-scope BFDs as the basis for design and testing
- Proposed design approach
- Explanation of the various design and testing activities that will be used (including examples)
- High-level plan for design, engagement and customer testing

V12 Business Functional Definitions

137 BFDs

There have been 137 Business Functional Definitions (BFDs) raised in Stage 4.1.2 to successfully deliver START Version 12. Most of these BFDs focus on conversion of existing site specific functionality from the current Version 11. A small number of BFDs represent new functionality included in Stage 4.1.2 scope or required as part of the deployment of Version 12.

The broad categories of site specific code addressed by BFDs:

- Navigation
- Landing pages
- Menu's and account functionality
- Intermediary client management

Most functionality that customers interact with remains unchanged as a result of the conversion from Version 11 to Version 12. This means that beyond the initial navigational changes – customers won't experience many changes to the services they are used to.

Design Approach

The design approach used to deliver the Version 12 changes is based on the evolving myIR Design Approach developed since Release 4 and further refined in Stage 4.1.1. This design approach (explained on the next slide) helps to bring decisions to the appropriate group earlier in the development cycle. The aim being informed decision making about what's required, what works for customers, and is sustainable in the myIR platform.

Design Approach

myIR BFD

- Define outcome / purpose
- Define business and user requirements
- Establish common use cases, risks and mitigations

myIR Scope Recommendation

- Determine the optimum set of requirements for the service
- Where required prepare scope recommendation
- Present scope recommendation to Design Group
- Record decision on myIR scope

myIR Design Session

- Design session to develop first iteration that meets agreed requirements and myIR design patterns
- If multiple design options are identified then prepare mock-up for review and approval

Development

- [*Information redacted*] begins development based on first iteration of design
- SME reviews development alignment against the agreed design and functionality
- First review of content

Quality Assurance

- Pre-development verified demo (myIR team)
- Ensuring these requirements are met:
  - Content,
  - Pattern application,
  - Usability, and
  - Design.
- Development task is verified / rejected based on feedback

My IR Design Group - review, escalation, arbitration

BFD Testing Groups

The myIR teams has been working with the [*Information redacted*] eService architect for the last three years to realise many of Inland Revenue's requirements as part of the development of START Version 12. This long term work has provided the opportunity for a greater adoption of out-of-the-box configurable functionality over site specific capability.

The objective

to move a greater proportion of myIR services to out-of-the-box functionality

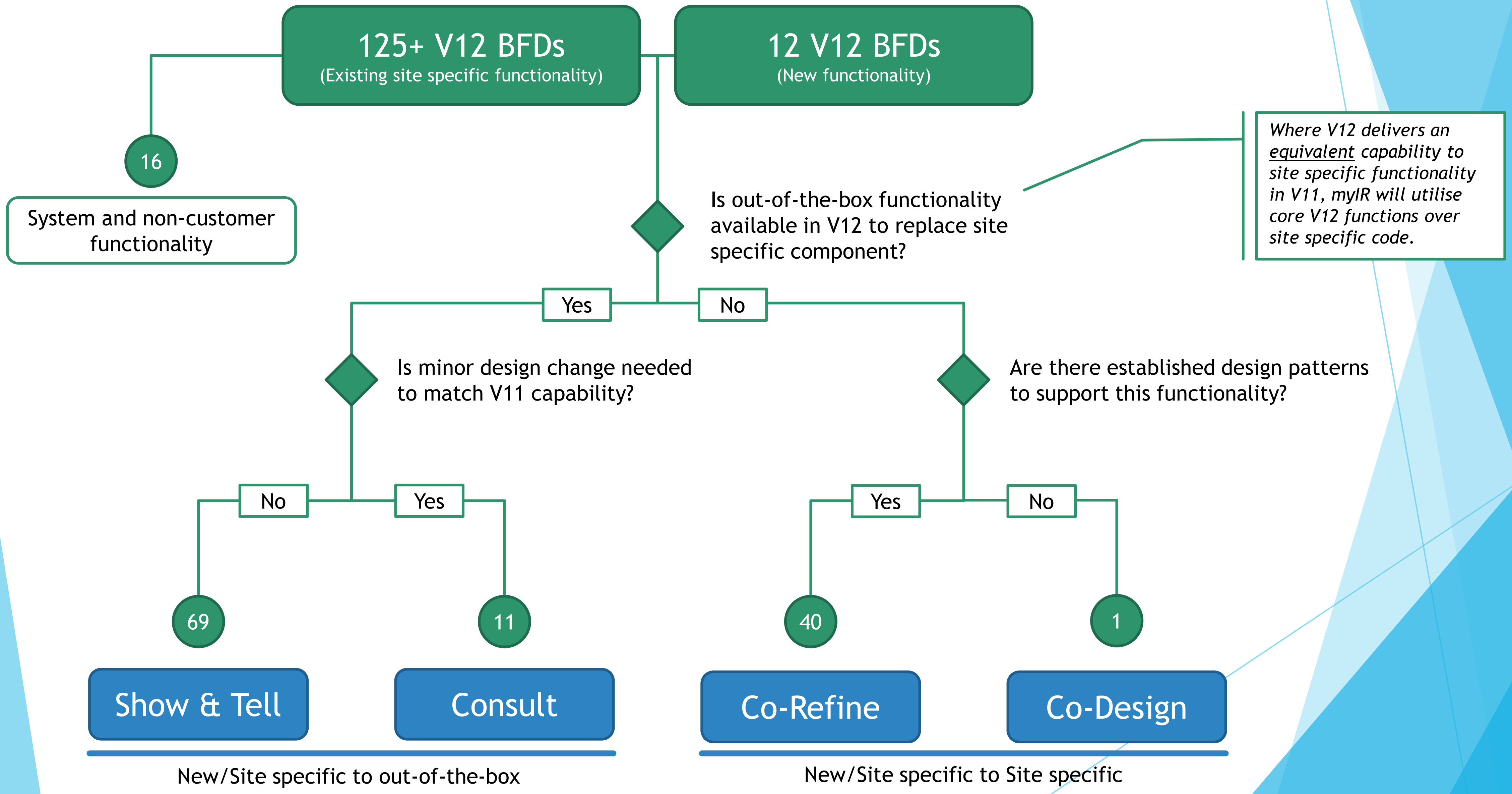
The benefits

- provides for a more stable platform,
- capable of upgrade to future versions with reduced conversion effort.

As a result, the myIR team has prioritised the implementation of out-of-the-box functionality over new site specific build. The 137 BFDs have been categorised into test groups based on the extent to which site specific code can be safely converted to out-of-the-box (OTB):

- **Show & tell** – Functions for which V12 OTB meets existing design without any change. There is no planned scope for change - communication to customer and business.
- **Consult** – Functions for which V12 OTB meets existing design with minimal configuration/pattern options. There is limited scope for change - communication to customer and business, limited customer testing.
- **Co-refine** – Functions for which V12 OTB requires extensive configuration to meet existing design, or V12 design will not match V11 design. Design patterns have been established. There is moderate scope for change. Significant customer testing and business engagement is planned.
- **Co-design** – Functions requiring redesign as a result of V12 design. No design patterns have been established. There is moderate scope for change and site specific configuration may be required. Significant customer testing and business engagement is planned.

Version 12 BFD test groups



myIR V12 Factory

833 SCREENS TO BE UPDATED

The majority of functionality in myIR will be converted through the myIR V12 Factory.

Because most features in myIR have been delivered through configuration rather than site specific code, and because Version 12 does not change the underlying systems myIR relies to operate it is possible to easily convert these features.

This means the 833 screens that need to be converted from Version 11 to Version 12 simply need the '**new look and feel**' – defined in the Version 12 Pattern Library – to be applied to them. Despite the apparent simplicity of this change an approach has been established to manage this work.

APPROACH

The myIR Factory approach has been designed to ensure accurate and successful conversion of existing functionality, identify and minimise the risk of adverse impacts, escalate changes required to V12 design to manage V11 site specific issues. The high-level process for myIR V12 Factory:

1. FAST developer is assigned a screen for conversion,
2. The developer refers to the V12 Pattern library and configures appropriately,
3. myIR SME reviews development as it is assigned,
4. Periodic quality assurance to ensure V12 Pattern Library adherence.

Delivery of the myIR V12 Factory conversion has been planned and agreed with FAST to facilitate early customer testing, and stakeholder demonstrations.

V12 customer testing

V11/V12 Comparative Testing

- Survey based testing using screenshots of developed functionality,
- 6 weekly cycle between July 2020 and September 2021,
- 3 weeks of survey followed by 3 weeks to complete analysis and prepare the report.

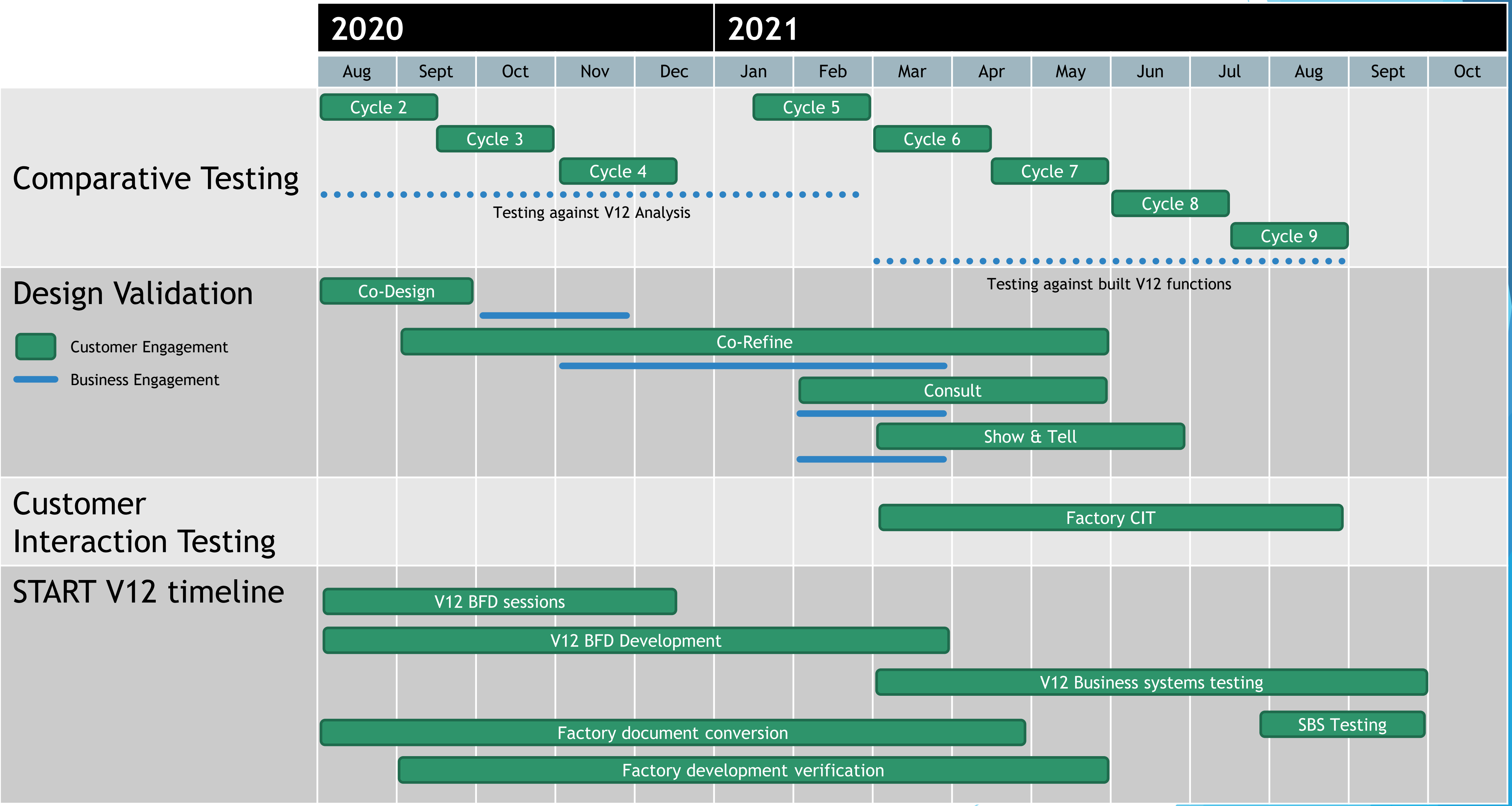
Design Validation

- Aligned with the V12 definition and development plan
- More detailed testing plan will become available as delivery of V12 BFDs progresses
- Design Validation will utilise differing techniques to collect feedback reflecting the inputs required. This may include such techniques as; Demonstrations, Surveys, Card Sorting, Observational lab testing, and A/B testing.

Customer Interaction Testing (CIT)

- At scale customer testing of built functionality
- Using the existing ‘sandpit’ environment to allow customers to test using their own data
- Validation of functionality under variable use cases and customer capability
- Factory converted functionality will be tested in CIT

V12 Development & Testing Plan



Appendix

BFD test group categorisation

Show & Tell – page 1

BFD Title	BFD Title
Headers and footers	V12 Web Menu account structure for RWT on interest
GST return updates (prototype)	V12 Web Menu account structure for IIT Income tax
FAM summary screen (prototype)	V12 Web Menu account structure for KiwiSaver scheme
Tax preparer (prototype)	V12 Web Menu account structure for KiwiSaver Member
V12 Web Menu account structure for Approved issuer levy	V12 Web Menu account structure for Non-resident withholding tax
V12 Web Menu account structure for AIP	V12 Web Menu account structure for Portfolio investment entity
V12 Web Menu account structure for Multi payment option	V12 Web Menu account structure for Payroll subsidy
V12 Web Menu account structure for CRS	V12 Web Menu account structure for Payroll
V12 Web Menu account structure for Dividend withholding tax	V12 Web Menu account structure for R&D Tax Incentive
V12 Web Menu account structure for Income Equalisation	V12 Web Menu account structure for Donation tax credit
V12 Web Menu account structure for Environmental Restoration	V12 Web Menu account structure for Residential land withholding tax
V12 Web Menu account structure for Working for Families	V12 Web Menu account structure for Rulings and determinations
V12 Web Menu account structure for FATCA	V12 Web Menu account structure for Resident withholding tax
V12 Web Menu account structure for FBT	V12 Web Menu account structure for Student loan
V12 Web Menu account structure for Gaming machine duty	V12 Web Menu account structure for Special Payment
V12 Web Menu account structure for GST satisfaction of debt	V12 Web Menu account structure for Tax Pooling Account
V12 Web Menu account structure for GST	V12 Web Menu account structure for "My profile"
V12 Web Menu account structure for ITN Income tax	V12 Web Menu structure from the customer level

Show & Tell – page 2

BFD Title	BFD Title
V12 Web Menu account structure for Business loan	V12 Other Impacts --> Name and Address updates
V12 Web Menu on the "select a customer" screen	V12 - Return expectation queries
V12 Action Items Standard	Standard logon landing page
V12 Action Item Conversion	Content Update - Confirmation screens
V12 Standards (Pattern Library)	Display of EDSR Letters **(New)**
User maintenance of logon profiles	E-Services - Tax agent transaction report
V12 "My Profile" screen	Tax Preparer Correspondence Reports - eServices
Updates to the forgot password process	Mail Item Notifications (Standard Customer) - eServices
What does the unavailable page look like?	Mail Item Notifications (Tax Preparer) - eServices
Expiration of web requests	Mail Item Alerts (Standard Customer) - eServices
Web request outage functionality	Mail Item Alerts (Tax Preparer) - eServices
eServices manager access **(New)**	AEOI V12 Doc Conversion
Returns V12 eServices Upgrades	Income Tax Returns - eServices
Employer returns - eServices	Web request reviews
Email bounceback/read receipt replacement **(New)**	V12 Other Impacts
eServices - Tax agent payment transfers - General	
eServices - Refund bank accounts	
V12 Other Impacts -> Changes to tblWebLogonToAccount/Customer	

Consult

BFD Title
Updates to creating first party logons on a third party
Income profile layout
EMP Employee Dashboard and account springboard conversion
Use of favourites functionality **(New)**
Tax preparer consolidated action items
Property Tax Decision Tree **(New)**
V12 Display of account balances **(New)**
eServices - Payment types and payment channels
eServices - Direct Debits
eServices - Unauthenticated credit card payments **(New)**

Co-refine

BFD Title	BFD Title
V12 Account panels standard	V12 Account panels for IIT Income tax
V12 Summary panel for customer level	V12 Account panels for RWT on interest
V12 Account panels for Approved issuer levy	V12 Account panels for ITN Income tax
V12 Account panels for AIP	V12 Account panels for KiwiSaver scheme
V12 Account panels for Multi payment option	V12 Account panels for KiwiSaver Member
V12 Account panels for CRS	V12 Account panels for Non-resident withholding tax
V12 Account panels for Dividend withholding tax	V12 Account panels for Portfolio investment entity
V12 Account panels for Income Equalisation	V12 Account panels for Payroll subsidy
V12 Account panels for Environmental Restoration	V12 Account panels for Payroll
V12 Account panels for Working for Families	V12 Account panels for R&D Tax Incentive
V12 Account panels for FATCA	V12 Account panels for Donation tax credit
V12 Account panels for Student loan	V12 Account panels for Residential land withholding tax
V12 Account panels for Special Payment	V12 Account panels for Rulings and determinations
V12 Account panels for Tax Pooling Account	V12 Account panels for Resident withholding tax
V12 Summary panel for large customers	Removal of tax preparer workspace
V12 Summary panel for Business Loan	Structure of Intermediary Centre **(New)**
V12 Account panels for FBT	Replacement of "I want to..."
V12 Account panels for Gaming machine duty	Home screen **(New)**
V12 Account panels for GST satisfaction of debt	Bankrupt customers **(New)**
V12 Account panels for GST	eServices - Customer level payments **(New)**

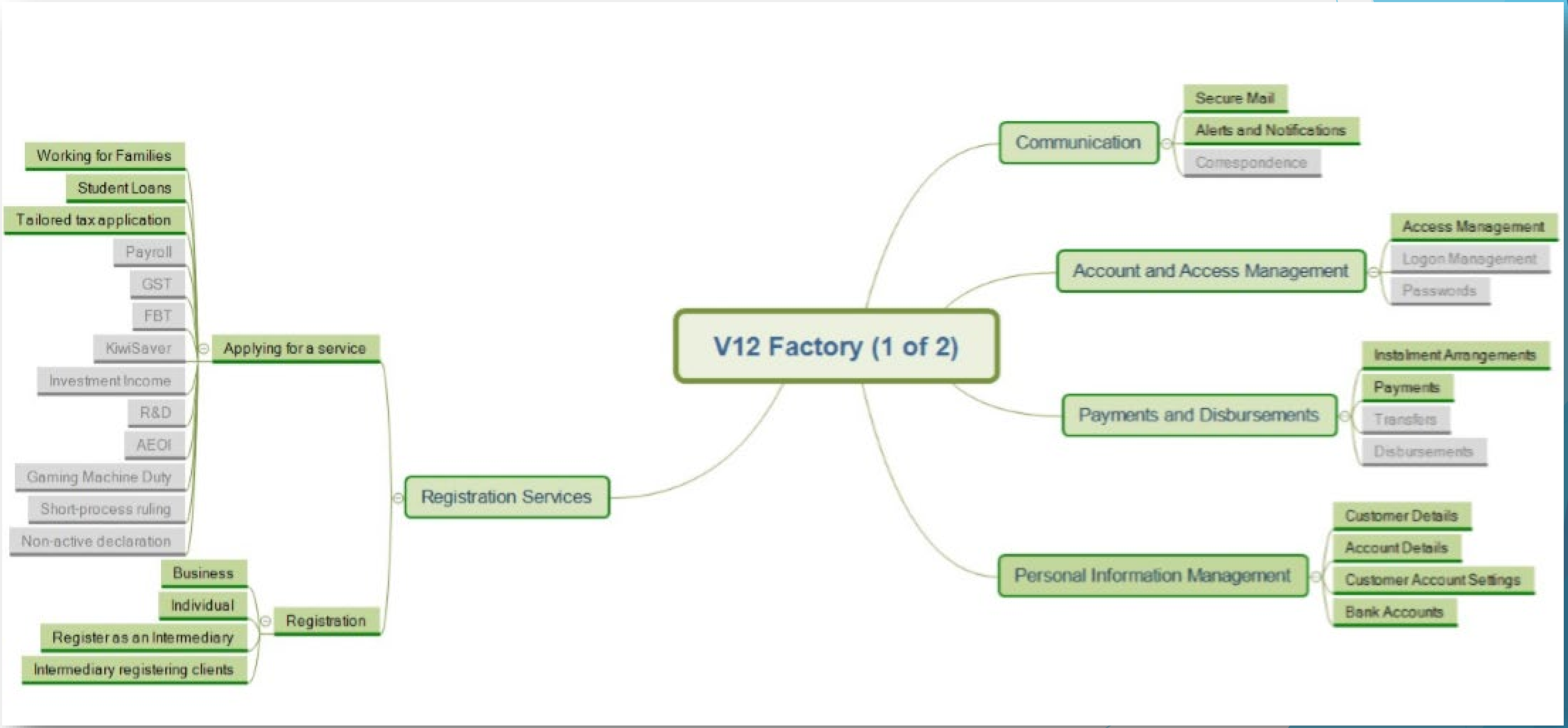
Co-design

BFD Title
V12 Web Menus Standard
V12 Web Menus Standard – customer
V12 Web Menus Standard – account level
V12 Web Menus Standard – intermediaries

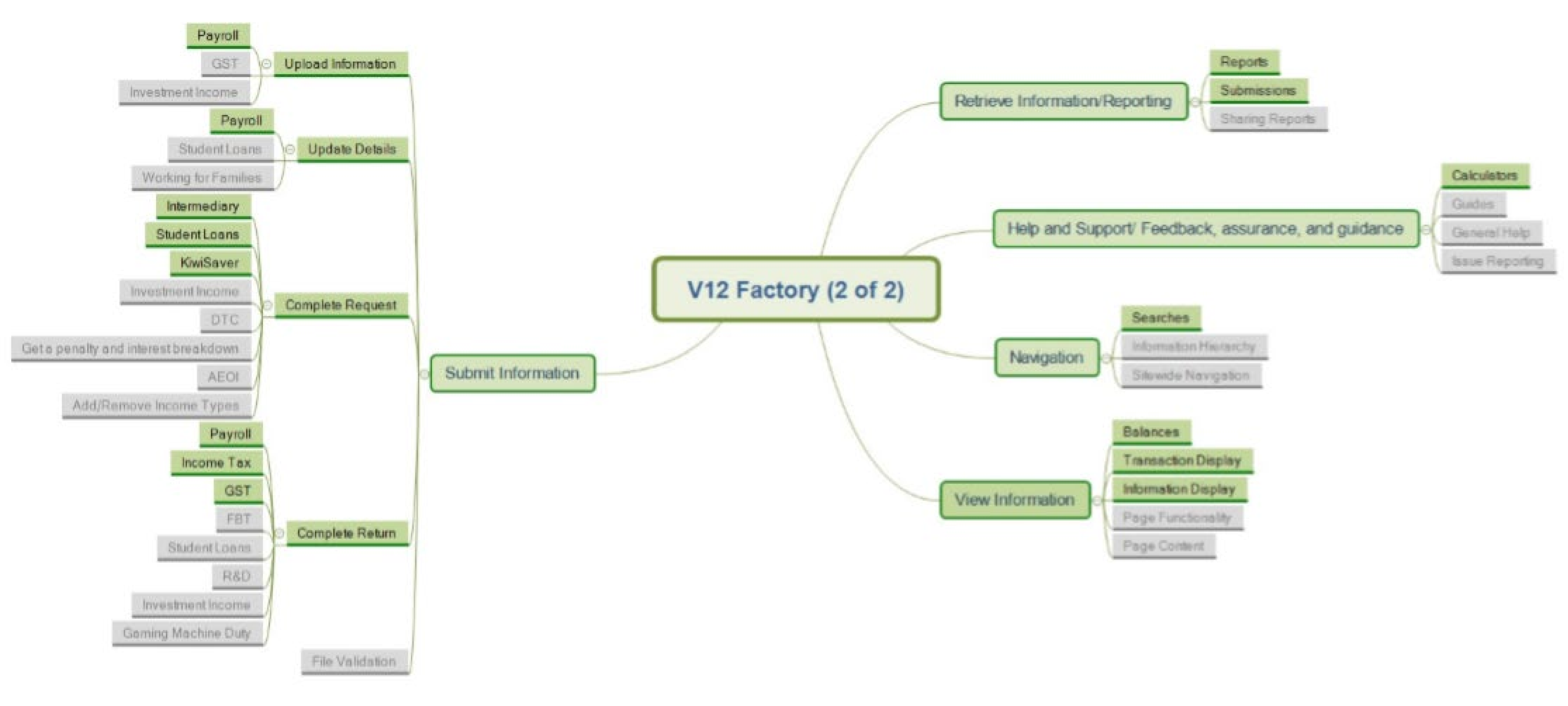
Appendix

“Factory” conversion customer testing scope

V12 “Factory” scope – Part 1



V12 "Factory" scope – Part 2



Appendix

Cycle 2 v11/v12 comparison testing report

CIT V12 Comparative Analysis – Cycle 2 Report

In order to better understand the customer impact of myIR changes, customer testing of V12 in regular cycles is conducted to assess customer satisfaction with V12 design in comparison with V11. Using screenshots of V12 and V11 customers were asked to identify their preferred option and offer qualitative feedback as to why their choice better meets their needs.

This cycle

281
customers

79.5%
preferred V12

2nd
cycle

This cycle - total customers per area

Area	Total	Prefer V12
Calls to action	281	69%
Action selection	280	75%
Mobile experience	141	79%
Logon settings	281	77%

All cycles

554
total customers

68.8%
preferred V12

11.7%
from last cycle

All cycles - total customers per area

Area	Total	Prefer V12
Access/Single Sign On	119	55%
Summary views & Balances	174	59%
Navigation	242	59%
Calls to action	338	69%
Action selection	280	75%
Facilitated action flows	*Out of scope*	
Intermediary functions	-	-
Feedback/assurance/guidance	*Out of scope*	
Mobile experience	141	79%
Logon settings	281	77%

Customers by region

Annual individual
77 Customers
88% preferred V12

Social Policy
83 Customers
72% preferred V12

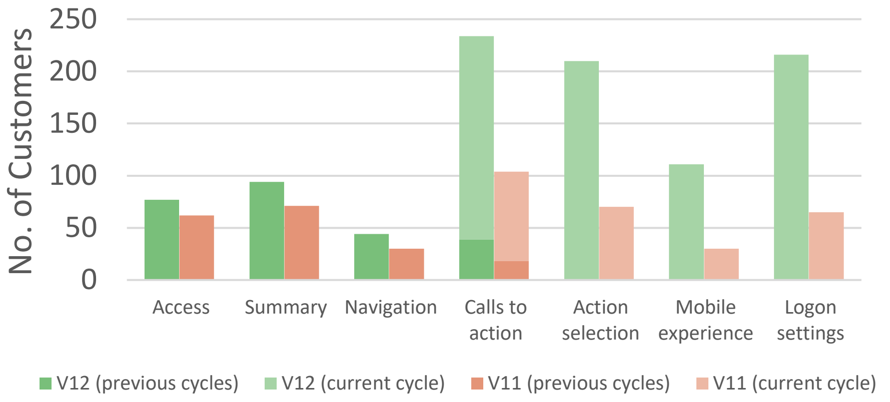
Frequent business
121 Customers
80% preferred V12

Complex
n/a

Intermediary
n/a

IR account manager
n/a

Preference over cycles



Next steps

5	Review content	Content/wording to be reviewed
2	Explore functionality	Explore available functionality in V12
4	Test in environment	Re-test in working test environment
-	Known Issue	Known issue, in review
1	Other	Other

Calls to action

How required tasks are presented to the customer, and how the customer recognises that an action is required.
Customers were presented a V12 landing page and notifications centre; and a V11 landing page and account page. Both displayed outstanding notifications/alerts. They were then asked choose which option they felt gave them a clearer understanding of what actions needed to completed.

281 customers

49.8% PC view

50.2% Mobile view

69% preferred V12

Annual individual 27% — **80%** preferred V12

Social Policy 30% — **59%** preferred V12

Frequent Business 43% — **69%** preferred V12

Simplifies how customers determine what they need to do

Most customers liked the simplicity of the alert tiles in V12. They felt that it enabled them to quickly assess what needed attention on their account and what they needed to do.
Since they were given more relevant information up front, they were able to decide whether they needed to perform an action or dismiss the notification with less clicks.

Annual individual

"[V12] uses less information on the screen that then allows the focus to go directly to the important actions required. Less cluttered and clear, simple language"

"[V11] is a "hunt and peck" look. I'd make more clicks than I needed to find what I wanted. [V12] promotes a quick decision on where it is relevant to click"

Mobile: "I can see alerts straight away, don't have to look for other links to click to find out info."

Social Policy

Mobile
"[V12] gave the most information at a glance. It also felt closer to social media with the tab layout and more applicable to the majority of present-day users."

Frequent Business

"I like the list of alerts/things to do, which allow me to work through them one by one. Also if the alert list is empty, it would clearly indicate that there is nothing to do."

Mobile
"I feel it has been broken down into bite size information that I can process."

"It is immediately apparent what needs to be done. There are 3 tasks to complete, and it is straight forward as to which accounts those tasks are for."

Difficult to determine importance of alerts

Some customers felt there was no indication of a hierarchy of alerts and therefore the importance of the notifications was difficult to determine.

They thought the alerts screen needed to highlight the most important notifications or display a clear hierarchy such as order of due date so that they could quickly identify and perform the most important actions first. They also suggested adding or highlighting due dates and the relevant period would help in assessing the priority.

Review content | Explore functionality

Annual individual

Mobile
"This is much clearer and cleaner. However the instructions are not time bound. The word "late" is used but what date is late? Late is subjective."

"Does not seem like every task I need is available"

Social Policy

Mobile
"There is a lot of info that doesn't require my attention"

"Not convinced having to scroll so far down is good, so much more to read to find what you are after"

"…different coloured font so the user knows they need to complete an action."

Frequent Business

"The lack of difference in colour that [V12] had makes things seem less important. If I were in a hurry I might skim read these items quickly and think they are optional things I can worry about later."

"better than [V11], but does not show what the due payment is for or when it was due."

"It's generally clear, but messages shouldn't be lumped in with things you must do. Should show when those actions are due by."

Not immediately clear where to go

Some customers found they would not have thought to click on the alerts tab as their first port of call. They felt the alerts tab wasn't sufficiently highlighted to signify its importance and therefore they may have missed some of the notifications or deemed them unimportant.
Note this was mainly due to familiarity with V11 and customers noted they would need to get used to going to the alerts screen when they first log in.

Review content | Test in environment

Annual individual

"You can see there is an alert/s by the colour dot. The overall whole page view is good and easy to see. I wonder if I would notice that they were alerts though? But you get a good view of what you need to do.

Mobile
"It would be much easier if the screen default was set on Alerts, then I would see what I needed to do and could click on Summary for other when necessary."

Social Policy

Mobile
"This option is better in that it tells you why it is important to read the new message. But, I didn't notice the 'Alerts' tab on the first screenshot. That may have been because it is an unfamiliar layout, but it may also be that it needs to be more prominent."

Frequent Business

Mobile
"The first page clearly suggests action needs to be taken under the alerts section, but it's not completely clear on that action until you select the actions tab."

"The alerts and my immediate obligations are very easy to see, but I had to look hard to see where to click if I really wish to do something else first."

Action selection

Findability, layout and usability of the 'I want to' menu.
Customers were presented with both the V11 and V12 landing & customer level 'I want to' screens. They were asked to choose which option they felt provided a better way to find actions that they want to complete.

280 customers

49.6% PC view

50.4% Mobile view

75% preferred V12

Annual individual (27%)	Social Policy (30%)	Frequent Business (43%)
79% preferred V12	**71%** preferred V12	**75%** preferred V12

Customers preferred the layout and categorisation of V12's 'I want to' menu

Across all user types and devices, customers preferred the layout of the V12 'I want to' screen. They felt the display was clean and modern, and that finding actions would be easier. Many respondents noted that the subheadings/groupings of the 'I want to' menu were much more helpful in V12, allowing them to quickly scan and find the action they required.

Mobile
"It's very straight to the point and easy to read. Like really easy to read."

"Because of the headings, the category I needed was easier and faster to locate."

Mobile
"Titled better, categorised logically. Looks easier to navigate"

"The subheadings and organisation of [V12] make it easier to skim through to find what I need."

"Although there is the same detail on the page, it is broken into sections which makes it more digestible and less daunting."

"I like that subheadings are used to organise the actions and this would no doubt make it easier to find the action I am looking for."

"'Much easier than [V11]. I like how the list is ordered by categories, I don't need to scan the whole list, I first scan the headings, find the appropriate one (register, apply and enrol), then just scan through those."

"Obvious headings and subheadings. Makes it easier to sort out what needs to be done"

"Far easier to find what you are looking for, as the options and section headers are organised properly."

Mobile 'I want to' list more difficult

Some customers felt that the 'I want to' would be difficult to navigate on mobile due to the long list to scroll through. This was made more difficult by the lack of descriptions for actions when viewed on mobile. Therefore they felt that there needed to be a balance between being able to identify and understand actions without having to read a large amount of text.

Review content | Explore functionality

Mobile
"I would not want to do this on my phone. It would have to be done on a PC as you have so much too choose from."

Mobile
"There are so many things that a user might want to do that to put every action in one place just looks messy. It is quite easy to miss a link as you read the page as it is so full of clutter."

Mobile
"No summaries of the headings are provided. People who don't use the system often, such as those that might be using a mobile device to access it, will find it more difficult to find exactly what they were looking for"

Mobile
"[V12] assumes I would know what the links mean or that I am happy to click a link, discover that it was not what I wanted and to go back to previous page."

Mobile
"...but no indication of what each heading relates to - may require a bit of "seek & find" before getting to the right one."

V12's search option was more noticeable

While both V11 and V12 provide a field for searching the 'I want to' menu, customers found the V12 version better drew their attention and was more easily recognisable as a search box.

"...the search bar assures me that I don't have to wade through the list to find what I want."

Mobile
"The search bar stood out more..."

Mobile
"I like the search area in V12. I just went back and see V11 does have a search area, but I didn't see it"

"I like the lens for the search field."

Mobile
"I like the placement [of the] search option which is easier to see and use."

'I want to' tab not prominent

Some users found that the 'I want to' tab on V12 was not prominent enough. This was often combined with the misconception that V12 had less options available as V11 displays a selection of 'I want to' options on the landing page. Customers familiar with V11 would need to get used to accessing all 'I want to' options from that tab.

Review content | Test in environment

"The 'I want to' option on the first page is not particularly obvious at first glance."

Mobile
"The "I want to" is hidden on the front page."

"I had to go back and see where the "I want to" icon was."

""I want to..." doesn't stand out"

"...the sample of actions is helpful as it gives you a clue as to what sort of things are there whereas [V12] has none of those visible"

"The light grey has a tendency to blend in and not be as easy to spot"

"The i want to button isn't obvious

Mobile experience

Due to the increase in mobile usage, we need to focus on maximising the user experience on smaller screens.
Customers were presented with a mobile view of each other task in the cycle (Calls to action, Action selection & Logon Settings) and asked to provide their feedback for each. After viewing and completing each task, they asked about their overall perception of the mobile experience.

141 customers

79% preferred V12

Annual individual 26% — **84%** preferred V12

Social Policy 39% — **76%** preferred V12

Frequent Business 35% — **78%** preferred V12

Simpler, more streamlined mobile experience

Most customers preferred the mobile experience of V12 as they found the display simpler and less overwhelming. This meant they could quickly identify relevant information about their accounts and see a clear path when needing to complete an objective.

They felt V12's display fit better on a mobile screen and due to it providing an account 'snapshot', made it easier for customers to read the page details and assess what actions they might need to perform without needing to log on to myIR through their PC.

Annual individual		Social Policy		Frequent Business
"[V12] had a much simpler and easier to follow lay out in comparison to [V11]. Visually it seemed to be more concise, used bigger font, displayed fewer options and was better categorised"	"[V12]is much easier to navigate. [V11] is hard to find edit buttons etc, as they are not immediately obvious."	"The format of most [V12] are more mobile friendly, [V11] felt more like a desktop format; [V12] had easier to find options and fewer pages to go through to get to desired page."	"Overall, [V12] has an easier interface such as simplicity of accessing things. Furthermore, the fonts are much better for reading the information."	"[V12] is approximately 1000% better than [V11]. This will ease some of the trepidation when logging into the IRD website to do some basic client work. On a mobile app it will help to respond faster when you are asked things while out of the office."
"Fits well on mobile screens, not too many scrolling and multiple pages involved." "Less clutter and easier to find what you want"	"Because everything is more clear and on the same screen" "Simpler, more concise, obvious and direct"	"I think [V12] appeared more straightforward and less complicated with ambiguity and distraction."	"[V11] feels dreary and ancient, it's difficult to use, and it doesn't work toward the interests of the person using it. [V12] seems to streamline the process more."	"Much cleaner interface, easier to work with/type etc"

Consistent with other websites and web standards

Some customers felt V12 had a more 'modern' approach which matched other modern-day websites.
This gave them confidence they would easily learn to navigate through myIR when using their mobile device.

Annual individual		Social Policy		Frequent Business
N/A	*Social Policy* "More designed like an app"	"[V12] overall seems to be more intuitive, and more like other apps which should make it easier to pick up to a new user."	"[V12] gave the most information at a glance. It also felt closer to social media with the tab layout and more applicable to the majority of present-day users."	"Easier and more consistent with other websites" "It gets you where you want to go easier, is easier to read and follow. More up to date format for the mobile worlds."

Too much unnecessary information which results in excessive scrolling

At times customers felt that pages still had too much information that was irrelevant to them. When viewed on a mobile this resulted in too much scrolling to find what they were after.

Optimisation

Annual individual		Social Policy		Frequent Business
"The menu design is cleaner, but the menu is still too long for a mobile screen."	*Social Policy* "[V12] kind of give alot of information at one go and alot of it is repeating so its alot harder to skim through to find what you need."	"... there is a lot of info that doesn't require my attention"	"[V12] seems to have more in depth information about all parts of your account which is a little visually overwhelming."	"...too much text, making things look cluttered and therefore complicated."

Logon Settings

Where to go to manage password, email address and logon details.
Customers were presented both the V11 and V12 versions of the relevant landing page, V11's settings and V12's Manage my profile pages along with the navigation involved for each. They were then asked to choose which option they felt gave them a clearer understanding when changing logon details and which they felt would be easier to navigate.

281 customers

49.8% PC view

50.2% Mobile view

77% preferred V12

Annual individual (27%)	Social Policy (30%)	Frequent Business (43%)
83% preferred V12	**73%** preferred V12	**75%** preferred V12

'Manage my profile' is more obvious and intuitive for customers, reducing clicks

Most customers felt that the wording of 'Manage my profile' gave them a clearer understanding of what options would be available to them rather than V11's 'Settings' option.

They felt that the options displayed under 'Manage my profile' is more in line with what they would expect to see. This meant they were able to find what they were looking for with less clicks.

"The [V12] label 'Manage my profile' seemed to me to be the logical location to access the email address etc."

"[V12] is easier because the title "manage My Profile" is more clear to do this changes than only Settings."

"'Manage my profile' very clearly indicates to me that this is where I would go to update contact details / passwords. I like that this is only a 1 click to see my details with "change email" etc directly underneath the existing one."

Mobile
"Easier to follow. Obvious label at very top 'Manage my profile'."

"My eyes immediately went to 'manage my profile'. The wording tells you exactly what it does, and it is displayed in a manner and position on the screen where it is easy to find."

"The 'Manage my Profile' button makes it clear to me where I would find related details."

"This is WAY better. I would definitively have followed the path to get to this final page and then can easily see what I can do next."

"'Manage my profile' is a clear statement. I'd do that. Settings is too broad an option."

"The logic of having personal details in a Profile section is better and follows the way many other sites group this type of information."

Customers preferred V12's layout as it made options easier to understand.

Most customers were happy with the presentation of the 'Manage my profile' page as all options were clearly visible and on one page. They could easily identify what each option was and how to make necessary changes.

"I like how there isn't a general edit tab (which was small in [V11]), so you can update/change specific information."

Mobile
"[V12] is easy to see from the home screen and gives you an option to edit information from there, rather than going through settings"

Mobile
"More user friendly, can clearly see details and how to change them. Would be a lot easier for older generation to navigate if they had to.."

"This is an improvement, all the anticipated options for editing your profile are available in one section."

"Nothing complicated about it, no need to do any research on how to videos. When I wanted to edit my profile some time ago, I researched on Internet on how to edit my profile on myIR [V11]."

'Manage my profile' could be more prominent on the landing page.

Some customers felt the 'Manage my profile' link was not immediately obvious and could possibly be missed. It was suggested it needed to be more prominent.

Review content | Test in environment

N/A

Mobile
"Although quite easy to figure out, the "Manage My Profile" link is small and easy to miss"

"Much shorter process which is good, but I wouldn't have thought to look at 'Manage my profile'"

"I did not see the 'Manage my profile' until the question pointed out that it was there. Maybe it would be better closer to the other options on the page."

"'Manage my profile' is good BUT its not prominent. Perhaps on the same line as 'Summary'."

Some expected options not included

A few customers thought there were some options missing that they would expect to see on the 'Manage my profile' page. Most of this confusion was a result of familiarity with V11, as additional options are now found under the 'I want to' tab. They also questioned why changing their address was not found here.

Explore functionality | Test in environment

N/A

Mobile
"There are fewer clear options about the changes I want to make - I guess means need to input a search in the search box"

Mobile
"One screen and you are where you need to be. Note that it no longer requires a physical address."

Where is the change postal address? Do we not use that anymore?"

N/A

Appendix

Customer level ‘I want to…’ Co-design report

Customer level web menu testing

What we did and why we did it

- Conducted a series of closed card sorting activities. This method was chosen as a usability technique to identify how customers expect to see information grouped when searching myIR.
- The card sorting activities involved a set of cards that each represented the links shown on the I want to.. menu at the customer level and six defined categories where customers were asked to group the cards in a way that made sense to them.
- Overall result showed consistent and repeatable themes.
- The objective was to gain insight into how customers identify and associated information to the groups provided. The results can be used to group and label the menu information in a way that makes the most sense to customer groups.
- Analysis of closed card sort results involved looking at the number of times cards were grouped with each category and identifying the most popular category for each card. Further engagement with each customer to understand their thought process / rationale about each grouping and defined headings.

Customer selection

14

Individual customers

Focus area

Defined categories V12	Defined categories V11
Group 1: My Activity	**I want to…**
Group 2: Communicating with IR	**Customer and account access**
Group 3: My details	**Other actions**
Group 4: Access Management	
Group 5: Payment, refunds and returns	
Group 6: Register, apply and enrol	

Customer selection criteria

- Current myIR user
- Individual with one or more account
- Self-employed
- Family customers

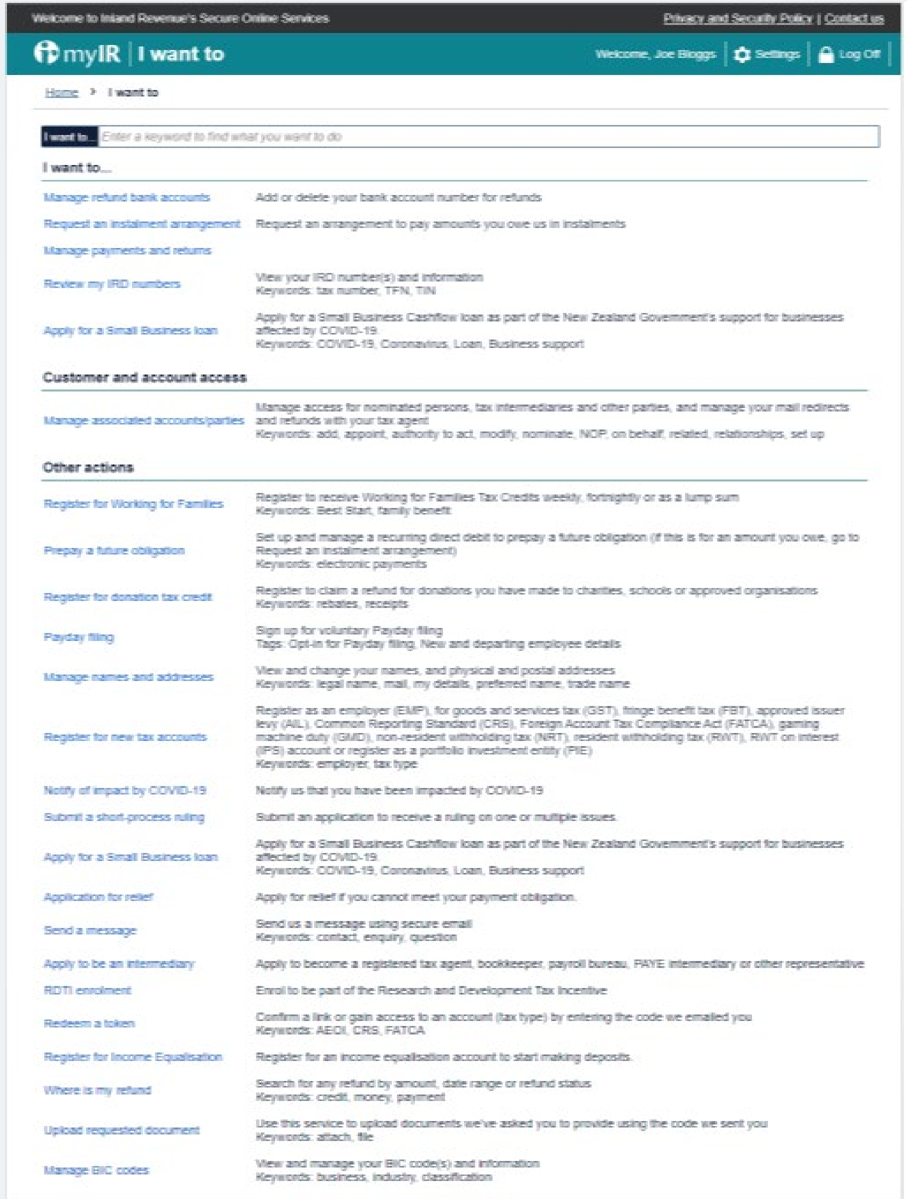
Annual individual

Social Policy

Frequent business

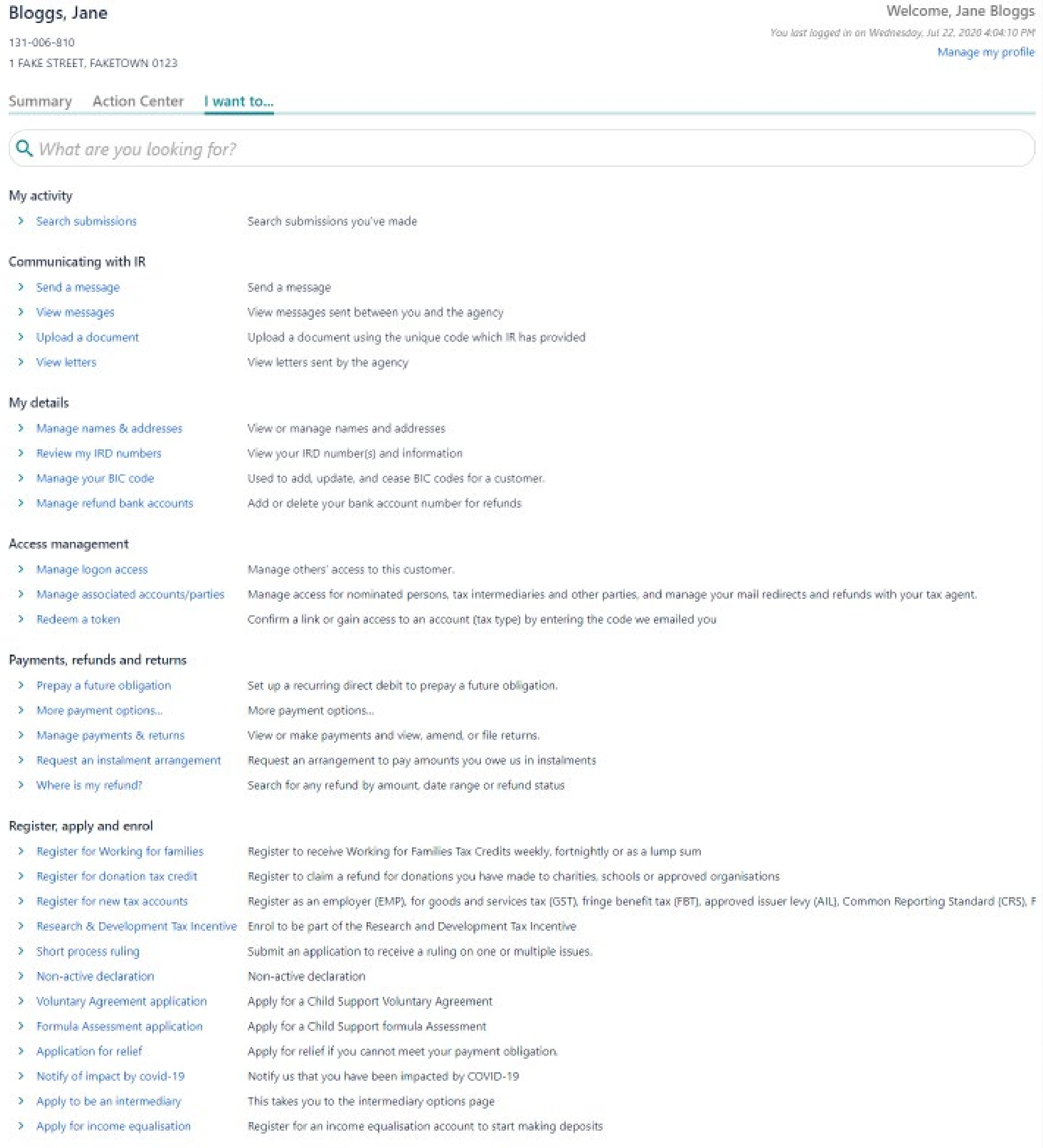
Note: We are using the opinion of the general populous rather than tax intermediaries or complex customers

V11 verses V12 customer level web menu



Currently the V11 web menu has only 3 categories
I want to…
Customer and account access
Other actions

Although we are not moving away from the list view, by adding defined categories, we want to assist customers to easily search for what they need to do.



The results

14
customers

	High agreement >75%
	Medium agreement
	Low agreement < 25%

Card name	My Activity	Communicating with IR	My details	Access management	Payments, refunds and returns	Register, apply and enrol
Search submissions	86%					
Send a message		100%				
View messages	21%	79%				
Upload a document		100%				
View letters	14%	86%				
Manage names and address			100%			
Review my IRD number			100%			
Manage your BIC code		14%	79%			
Manage refund bank accounts			93%			
Manage logon access			21%	79%		
Manage associated accounts/parties				93%		
Redeem a token		21%		71%		
Prepay a future obligation					100%	
More payment options					100%	
Manage payments and returns					100%	
Request an instalment arrangement		29%			57%	
Where is my refund?					93%	
Register for Working for Families						93%
Register for donation tax credit						93%
Register for new tax accounts						93%
Research & Development Tax Incentive						100%
Short process ruling		50%				43%
Non-active declaration	14%	29%				36%
Voluntary agreement application						93%
Formula assessment application						100%
Application for relief						86%
Notify of impact by covid-19		79%				14%
Apply to be an intermediary				14%		86%
Apply for income equalisation						100%

Themes and comments:

- Web request titles and descriptions need to be reviewed and possibly included in optimisation
- Participants felt that My activity could be a sub category of Communicating with IR and just merge the two categories
- Participants felt that access management could also be a sub category of My details
- Terminology confusing such as 'access management', not sure what it is so would just click on it being curious
- Within the communicating with IR category would include a sub-category that then defined communication from IR and communication with IR
- Have specific groups for the type of request that are available 'Families' 'Individual' 'Business’
- If the list changed to a drop down box would need to be mindful when categorising that the list don't get too big - Group 6 (register, apply and enrol) was big
- Couldn't make sense of what 'my activity' is so wouldn't use it, it's not relevant

Website comparison

We reviewed other websites to understand how they managed categorises of requests and access to them. This was to understand what common practices there were and what we can apply.

Following websites were reviewed:

Information redacted

Gaps with myIR:

These websites have similar functionality with myIR, i.e. manage accounts, register and apply. But the terminology differs from IR , and instead uses more familiar terms and focus on the general populous.

Closing the gaps:

•Using familiar terminologies
•Category using actions and tasks
•Be descriptive
•Provide clear description

Next steps

In analysing the data, the results suggest that there is a high agreement across all the defined categories where the common theme throughout the sorting was the word association, such as register for donation tax credit was placed in the 'register, apply and enrol' group. Participants advise that it seemed logical to put it in that group because it had the word 'register' in the title.

With this in mind, it would be recommended that the web request titles and descriptions be reviewed as part of optimisation and to look at the use of nouns and verbs. If these were removed from the title would it still make sense to a customer if the title just said Donation tax credit to look in the register, apply and enrol group.

When looking at the comparison of websites this indicates that myIR has similar functionality to them, however the terminology differs where the other websites use more familiar terminology. This provides further support for the need to review terminology.

Recommendations	Comments
Review terminology of web request titles and descriptions	Work with content hub to provide the wording of each title
Review terminology of categories	'Access management' was confusing to customers, some of the terminology did not resonate with them
Complete additional testing once system is available, focusing on the navigational aspect	

Suggested categories:

- My Activity
- Communicating with IR
- My details
- Access management
- Payments, refund and returns
- Register, apply and enrol