



Inland Revenue

# **Business Transformation Programme**

## **Stage 2 Customer Testing Exit Report**

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**Prepared by:**

**Date:**



## About this document

This document outlines the scope and output of the usability testing that was completed by the Customer Experience Workstream.

Usability testing validates the ease with which users can complete given tasks and to identify opportunities to improve the Customer Experience for eServices.

This deliverable is for the Customer Design Validation Test Exit Report for Release 2.0.

## Document control

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The following people/groups have been Informed of the development and completion of this document			

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## 1 Introduction

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The purpose of usability testing with customers is to validate the ease with which users can complete given tasks and to identify opportunities to improve eServices.

### Scope of testing:

The topics covered for Release 2.0 Usability Testing were Payments, Fringe Benefit Tax (FBT) and Resident Withholding Tax (RWT) on interest, Employment Activities, Workspace and Registration.

For each two week sprint, research was carried out by the Customer Design Validation (CDV) team with Inland Revenue customers. During week one users were invited to a usability session where they were asked to complete a number of tasks using eServices. Observations from these sessions were discussed within the CDV team at a collation session. In week two potential improvements to issues found in week one were incorporated into a prototype of the solution. Users were invited back (or new users were recruited) for validation sessions of the prototype design. During these sessions users were asked to complete the same tasks as in week one to validate if the changes had improved the users ability to complete their tasks.

The research findings are reported on each sprint. Issues reported were mainly CSS style guide, functional or navigation related. Any recommended improvements were discussed with Subject Matter Experts and Design Experts, and SQRs were raised so they can be implemented by the FAST development team for Release 2.0 (or a future phase).



**7**  
**Sprints**



**4**  
**locations**  
Wellington  
Auckland  
Christchurch  
Nelson



**86**  
**Discovery**  
**sessions**



**32**  
**Validation**  
**sessions**



**43**  
**defects**  
**raised**



## 2 CDV Sprint Topic Coverage

*Note: Refer to the defect table in this report for defect's*

### Sprint 1: Payments

**Location:** Wellington **Number of interviews:** 13 **Customer Segment:** 10 Small to Medium Enterprises, 3 Tax Agent Secondees

This sprint focussed on usability of each of the payment processes (Direct Debit, Credit Card, and Foreign Direct Debit). Users were asked to make payments (within or outside a return), cancel a payment, and set up default bank accounts. The issues discovered were consistent across users and solutions. No major issues were raised for this topic and the majority of issues raised were content related. Examples of content related issues raised include; unintuitive payment types available from a drop down and missing currency identifiers.

The majority of the proposed solutions involved updating wording in order to provide more clarity to the user. The reviews of the proposed changes by content experts provided a level of confidence for the Product Owner to decide a Prototype of the proposed changes and validation sessions with users were not required.

### Sprint 2: FBT + RWT on interest

**Location:** Wellington **Number of interviews:** 5 **Customer Segment:** 2 Large Enterprises, 4 Tax Agents

This sprint identified issues related to usability of the Account types Fringe Benefit Tax (FBT) and Resident Withholding Tax (RWT) on interest. For this topic the issues raised by users related to content clarity and labelling , as well as screen layout and behaviour (particularly the calculator pages).

Users were asked to locate where they could file their FBT and RWT returns. Users then completed these returns and then searched for their submitted form. Proposed changes included, including a breakdown of the subtotals on the right side of the total (FBT), have the form prepopulate any vehicle details entered in a previous return (FBT) and rearrange the labels of the address fields in order to improve the input flow (RWT).

Proposed changes were validated with the users and the changes were well received by users .



## Sprints 3, 4 and 6: Employment Activities

**Locations:** Auckland and Wellington **Number of interviews:** 44 **Customer Segment:** 17 Micros, 9 Small to Medium Enterprises, 8 Bookkeepers, 4 Payroll Intermediaries, 1 Large Enterprise, 6 Government Agencies

This topic was split into 3 sprints.

- Sprint 3 usability sessions were held with SMEs and Micros and focussed on the manual entry of employee information
- Sprint 4 usability sessions were held with Book keepers, Payroll Intermediaries and Government Agencies and focussed on the file upload process and the presentation of error and warning messages for this process.
- Sprint 6 was a validation only sprint due to inconclusive validation findings from Sprint 4.

Sprints 3 and 4 revealed some major issues with navigation and content. Users struggled to navigate from Heritage and myIR and once in eServices they struggled to locate the 'Employment Activities' tile. While attempting to submit an EMS users had issues such as difficulty finding the file upload link and differentiating between errors and warnings. Proposed solutions included changing the file upload link to a button and updating the naming of the tile from 'Employment Activities' to Payroll returns'. These changes were well received by users.

## Sprint 5: Workspace

**Location:** Christchurch **Number of Interviews:** 11 **Customer Segment:** 8 Micros, 3 Small to Medium Enterprises

This sprint focused on the workspace/navigation of eServices. The focus was on determining the users effort in finding where to perform various tasks including amending a return, checking the status of a refund, updating the registration details held by IRD, correspondence with IRD and change password. Most users struggled to locate the access points for these tasks and only after a few attempts, or with the facilitator having to intervene, did they navigate correctly to complete the task. Issues included identified during this sprint included, users do not understand the Customer/Account/Period structure, users could not locate the update address function and users struggled to find where they could send a message to IR.

This was a research only sprint. The solution stage of this sprint was not completed. This time was instead used for further validation of the 'Employment Activities' topic.



## **Sprint 7: Registration**

**Location:** Nelson **Number of interviews:** 13 **Customer Segment:** 7 Micros, 6 Small to Medium Enterprises

This sprint focused on the Registration of accounts . The focus was on determining the user effort in finding where to perform and complete various tasks including adding a new account type, finding account submission and adding a profile. Most users struggled to navigate to the correct link to start the process as well as understanding the terminology used. The completion of the forms themselves did not pose any major problems to users.

Some of the issues encountered included, finding the 'Register a new Account' link and understanding the difference between adding an account and creating a new profile. Users were also unclear as to what should happen after they submit the forms.

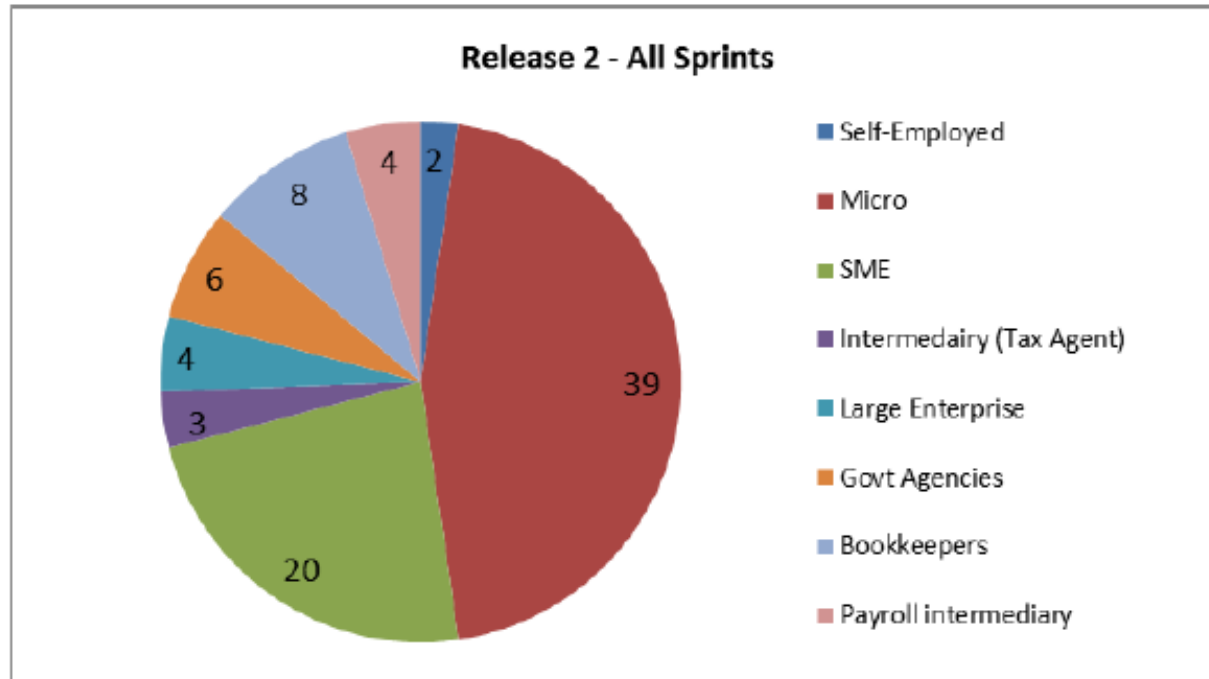
This was a research only sprint. The solution stage of this sprint was not completed due to the cut off date for the implementation date for Release 2.0 changes. The topic will be revisited for Release 3.0.

*Note: To view the sprint reports please see the 'Customer Design Validation' folder in SharePoint.*





### 3 Release 2 Demographics – Customer Category



\* This demographic figure is subject to change pending an update from the R&E team. Five users from Sprint 5 will be classified as either SME or Micro.

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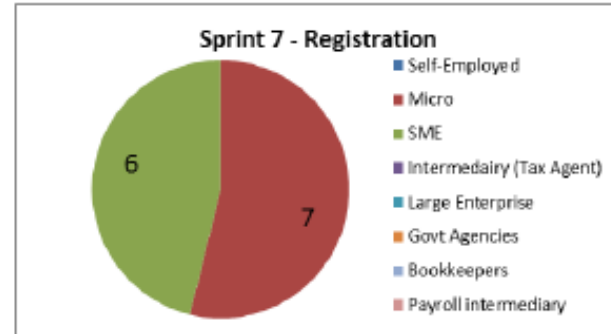
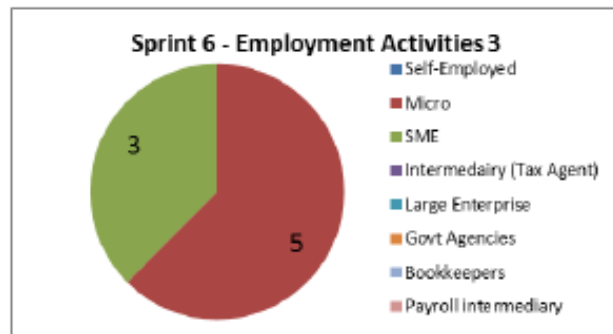
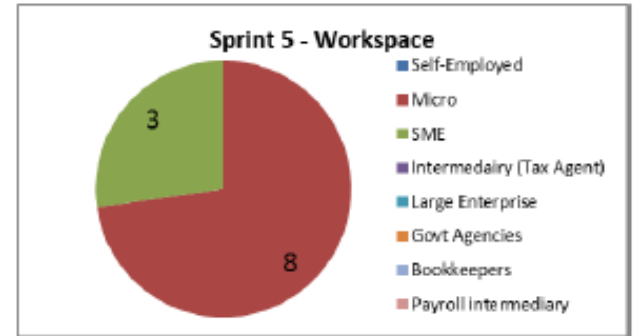
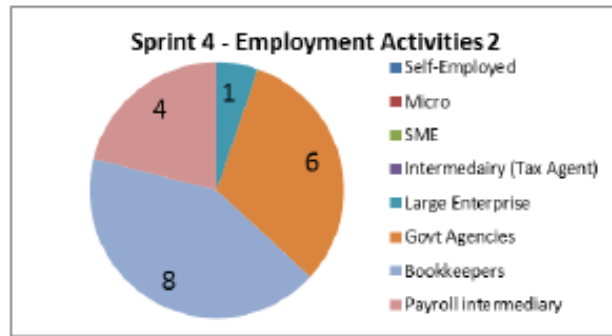
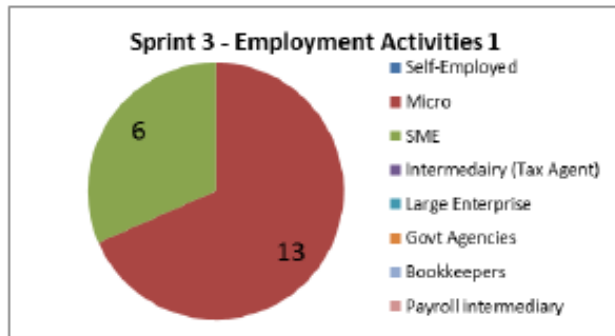
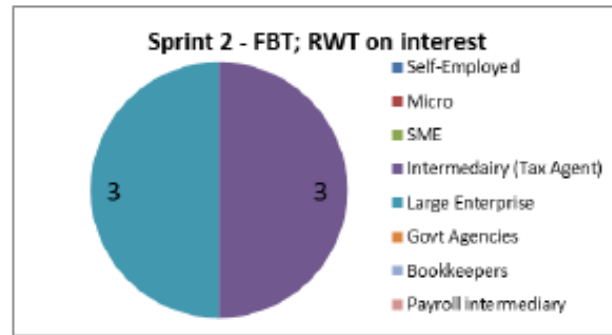
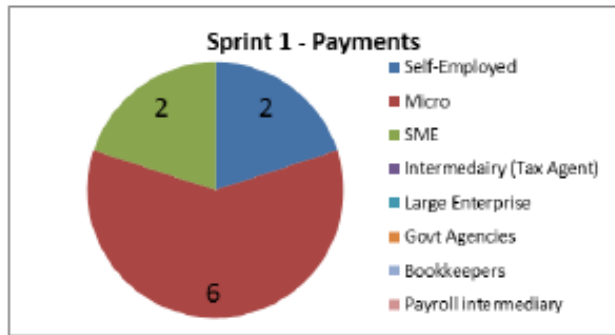
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## 4 Release 2 Demographics – Customer Category by Sprint

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## 5 Release 2 Sprint Summary

Sprint	Sprint Topic	Research Location	Customer discovery sessions	Customer validation sessions	Defects raised
1	Payments	Wellington	13	0	6
2	Fringe Benefit Tax (FBT) and Resident Withholding Tax (RWT) on interest	Wellington	5	5	9
3	Employment Activities (Part 1)	Auckland	18	8	7
4	Employment Activities (Part 2)	Auckland and Wellington	18	11	11
5	Workspace	Christchurch	11	0	0
6	Employment Activities (Part 3)	Wellington	8	8	9
7	Registration	Nelson	13	0	1

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## 6 Release 2 Defect Summary

Defects found by Sprint

Sprint	Sprint Topic	Severity 1 (Critical)	Severity 2 (High)	Severity 3 (Medium)	Severity 4 (Low)	Total
1	Payments	-	-	5	1	6
2	Fringe Benefit Tax (FBT) and Resident Withholding Tax (RWT) on interest	-	-	9	-	9
3	Employment Activities (Part 1)	-	1	6	-	7
4	Employment Activities (Part 2)	-	2	9	-	11
5	Workspace	-	-	-	-	0
6	Employment Activities (Part 3)	-	9	-	-	9
7	Registration	-	-	1	-	1
<b>Total</b>		<b>0</b>	<b>12</b>	<b>30</b>	<b>1</b>	<b>43</b>

Current status of Release 2 defects

Current Status	Severity 1 (Critical)	Severity 2 (High)	Severity 3 (Medium)	Severity 4 (Low)	Total
Closed – implemented	-	11	18	1	30
Closed – discarded	-	1	2	-	3
In Development	-	-	2	-	2
Submitted	-	-	1	-	1
Submitted – future change	-	-	7	-	7
<b>Total</b>	<b>0</b>	<b>12</b>	<b>30</b>	<b>1</b>	<b>43</b>

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