Research report

Real Time Information: Website Usability Testing

Information Architecture Analysis and Usability Testing of the PAYE Real Time Information (RTI) Help and Guidance website

User Vision

06/08/2012

About Personal Tax Customer & Strategy (PT C&S)

Personal Tax Customer & Strategy works with colleagues in Personal Tax and across HMRC to help develop our approach to implementing the customer centric business strategy. We use customer insight to help PT design, deliver and operate services for individual customers which

- improve customer experience
- maximise tax yield
- ensure that those who need help get the support they need, when they need it

PT C&S also has a corporate role, to manage the relationship with the voluntary and community sector on behalf of HMRC

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Research requirement (background to the project)

HMRC are introducing significant change to the PAYE system to report information in real time (Real Time Information). Under Real Time Information (RTI) employers will tell HMRC about PAYE payments and deductions at the time payments are made to employees.

RTI will mean:
- Annual employer returns are no longer needed, reducing costs for HMRC and employers.
- HMRC can use the real time information to update records when a taxpayer changes employer - removing the need for employers to separately send forms P45 or P46.
- DWP will have real time information on earnings enabling efficient administration of the Government's Welfare Reform agenda.
- Better prevention and detection of error and fraud within the welfare and PAYE systems.
- Better debt management.
- In some circumstances, HMRC will be able to adjust employees' tax codes in year to reflect their changing income and therefore reduce the need to send employees repayments or bills after the end of the year

As part of this, HMRC are developing a Help and Guidance website to support employers in identifying the tasks and requirements (e.g. software update) needed to comply with Real Time Information (RTI) when they operate their payroll and how and when those tasks should be completed.

The website is designed for any employer who operates payroll or a payroll bureaux or agent acting on behalf of an employer. Although the website will be used by employers in the pilot there was a need to ensure the guidance meets the needs of all employers who have less support than those involved in the initial pilot stages.

HMRC required customer research to help ensure that the website designed for pilot customers is fit for purpose by gaining an in-depth understanding around customer responses to the navigation architecture. The recommendations from this project fed into changes made to the design and content of the website.

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When the research took place

The research took place in two phases:
- Testing of the intended Information Architecture (IA – the hierarchy, grouping and labelling of site content) – March 2012
- Usability Testing of the developing website – June 2012

Revisions were made to the Information Architecture between the two phases and before the usability testing was carried out.

Who did the work (research agency)

A UK User Experience Consultancy, User Vision, based in Edinburgh

Method, Data and Tools used, Sample

The approach was different for each phase of work and these are outlined below:

Information Architecture (IA) Analysis

Aim: Ensure the grouping and labelling of content is as effective as possible and that site users can find the content they are looking for quickly and easily.
- The proposed IA for the PAYE RTI External Guidance site was tested offline (n=14) and online (n= 91)
- The offline testing was task-based to cover the key journeys, and also using a "think aloud" protocol to capture qualitative feedback, and lasted one hour.
- The online testing followed the same protocol but without the qualitative feedback, and a sub-set of tasks to complete in a shorter period of time.

- An additional survey was used to capture requirements for Home Page links (what links from which section participants would find to be of most use on the Home Page).
- Data captured included: Task success rate, frequency analysis of end-points selected, Time taken on task, qualitative feedback, Home page link preferences and some pre-test information on User Profiles.
- The participants were recruited against agreed profiles, with the key aspects being to ensure a mix of:
    - Business size
    - Confidence and expertise with the use of the Internet and online services
    - Use of agents

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Usability Testing

Aim: to ensure that the website provides quick access to guidance on the PAYE RTI system through an effectively organised and labelled IA. It should also provide clear, concise and helpful content whilst minimising usability barriers and provide a user experience that encourages use where required.

- The PAYE RTI External Guidance site was tested offline with 14 participants, consisting of 12 employers and 2 payroll agents.
- The testing was task-based to cover the key journeys, and also using a "think aloud" protocol to capture qualitative feedback as users completed the tasks
- Tasks included assessing how easy it is to navigate around the site, how 'understandable' the information is and whether the participants were able to obtain all the information they needed.
- The test approach also included a short post-test questionnaire and interview to capture final feedback from participants.
- Data captured included: Task success rate, qualitative feedback, post-test ratings of different aspects of the user experience provided, and suggestions for improvements.
- The participants were recruited against agreed profiles, with the key aspects being:
- The participants were recruited against agreed profiles, with the key aspects being to ensure a mix of:
  - o Business size
  - o Confidence and expertise with the use of the Internet and online services
  - o All to do some, if not all, payroll tasks in house.
  - o Use either basic PAYE tools, 3rd Party tools or software, or don't use dedicated tools
  - o Agents must carry out at least some or all of Employers Payroll duties for other companies and be authorised to carry out these duties by HMRC.

Main Findings

The main findings from the two phases of the project are highlighted in the corresponding sections below:

Information Architecture Analysis

The online findings closely followed those of the offline testing, confirming the validity of the results from the smaller sample:

The key issues noted were:
- The label for 'Getting Started' at Level 1 required expansion to include a reference to RTI, to differentiate it from current PAYE practice.

- The reporting element of the section title 'Payroll - calculating, reporting and paying employees' (level 1) was very often overlooked requiring the Payroll and Reporting elements to be separated into two sections at Level 1;
- Links assisting users with solving payroll and reporting issues were unlikely to be found in their current locations, and participants consistently requested a troubleshooting or help area to bring all these links together.
- Cross-linking to related content (identified through the testing) was required throughout.
- The most commonly sought links on the home page from the different sections were identified.

These and other noted issues were addressed by HMRC before the second phase of testing took place.

Usability Testing

The tasks covered most of the site content and many positive issues were noted, including:
- The home page providing a comprehensive overview of the site's contents
- Clear layout of the Home page into discrete clearly labelled sections
- The links provided on the Home Page were labelled clearly and gave quick access to content.
- The content provided effective cross-linking to key content
- The content was well-crafted and easy to read

The issues noted were:
- Links sometimes omitted or offered sub-optimal keywords resulting in users understanding and expectations of these links being less clear and reducing the ability to locate content as effectively as it otherwise could.
- Content pages could be overwhelming with a large amount of text for users to read – as a result specific information was sometimes difficult to locate.
- Headings occasionally lacked focus and little page section differentiation reducing the user's ability to effectively search the page via frequent scrolling.
- In-page navigation did not offer the level of granularity required on the long pages to provide visibility of and direct access to sub-heading level content
- Lack of emphasis on keywords and phrases in the content to aid reading online

A number of tasks were the same between the IA testing and the Usability Testing, and the comparison of the task success rates are very favourable, with a clear trend towards an increase in task completion rates as shown in the graph.

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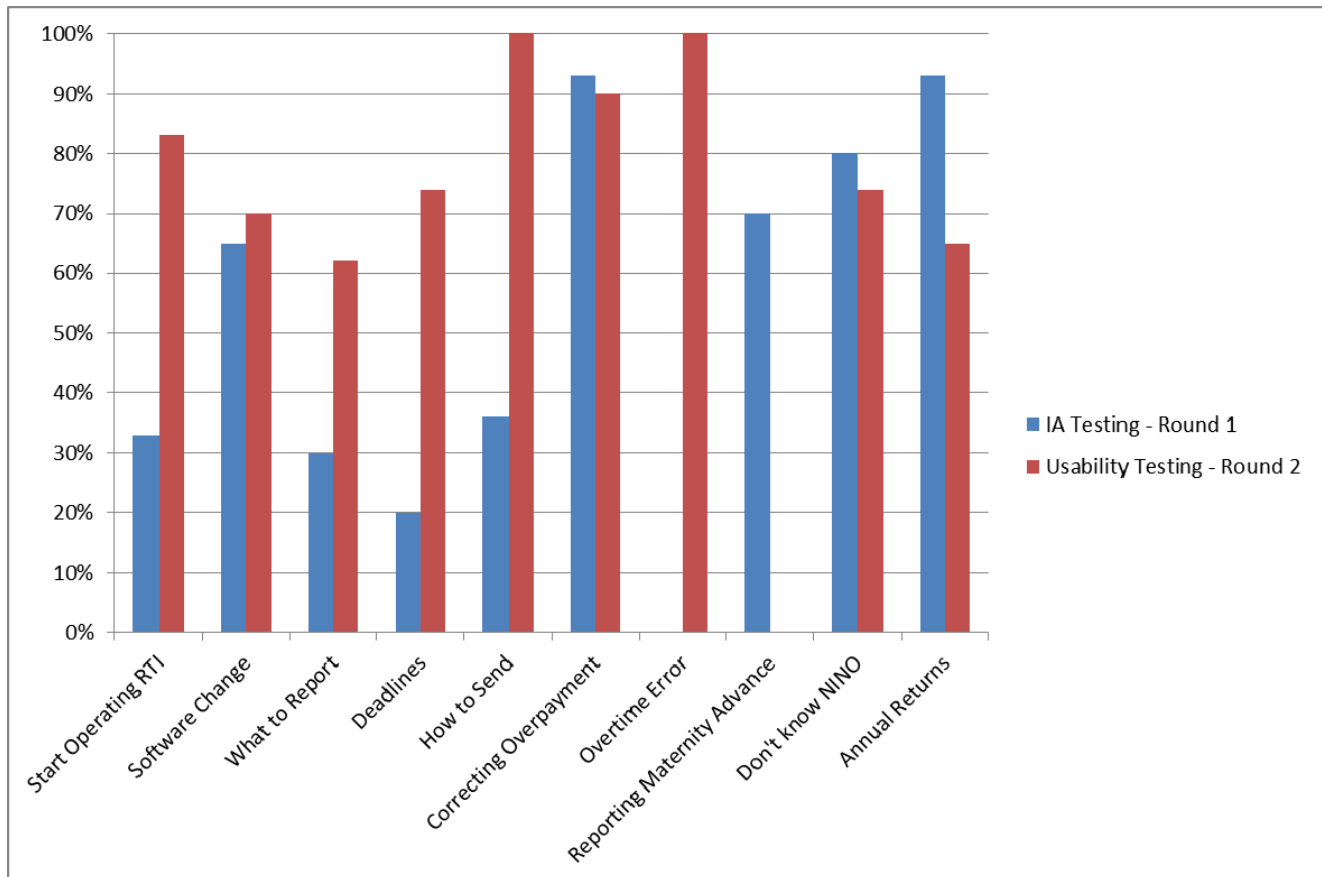
Graph showing comparison of completion rates per task between the IA testing (Round 1) and the Usability Testing (Round 2).

Where there was either no increase in the completion rate, or there was a decrease, this was most often due to display issues on the page where the content was located, rather than the journey to it; indicating that the IA was working effectively and the problem lay in the design at the page level - as identified during the usability testing of round 2.