

Using a Web Portal as a Hub for Respondents in Business Surveys

Aryn Hernandez, Temika Holland, & Michelle Karlsson

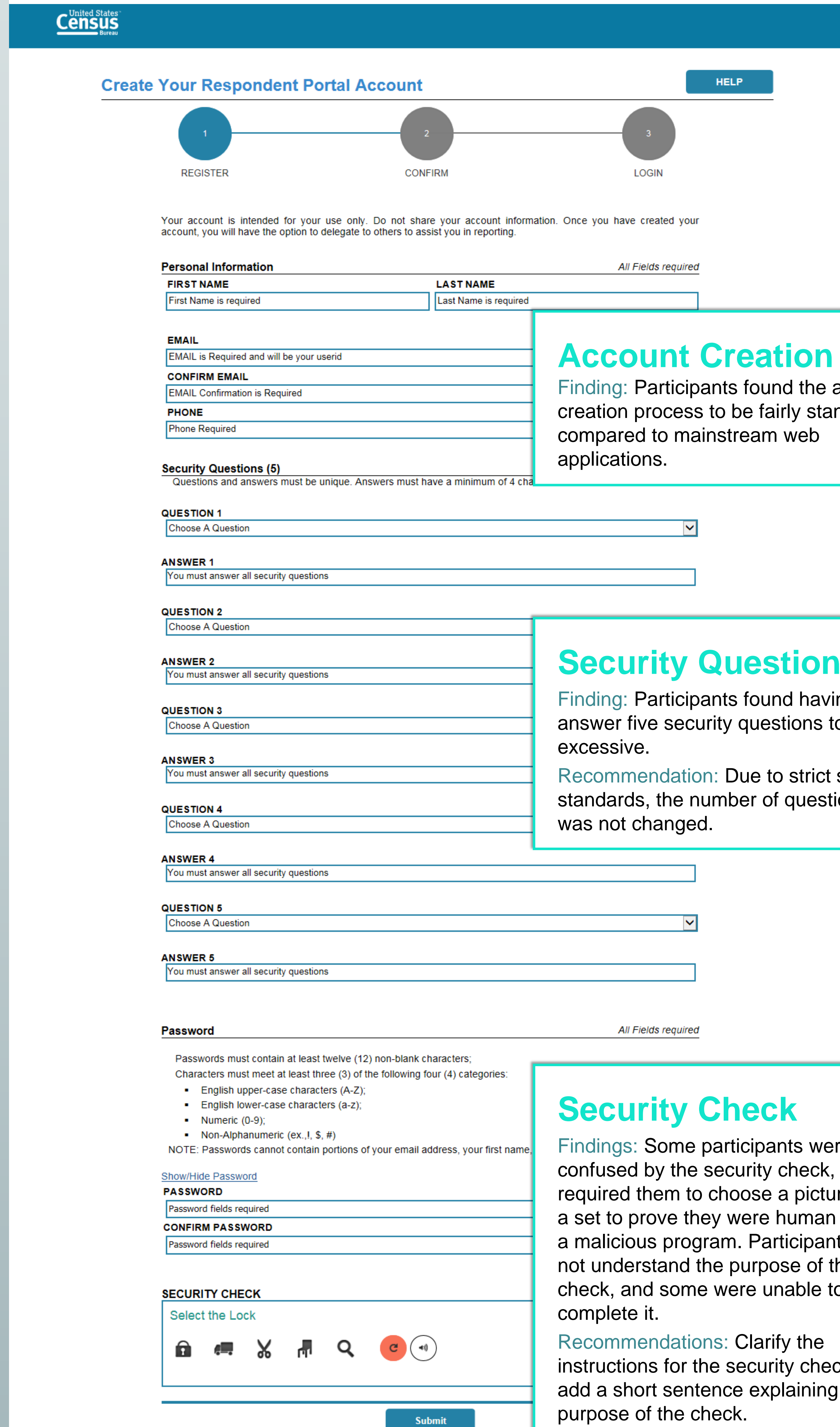
Background

- Respondent Portal created in 2016 due to the Internal Revenue Service's higher security standards for the Census Bureau's business surveys.
- The Portal was also developed to reduce burden for business respondents who are in multiple survey samples.
- Currently, each online business survey administered by the Census Bureau resides on a unique URL. Each URL requires a different set of user ID and password, or login credentials, that was provided to respondents in a mailed survey request.
- Within the Portal respondents must create their own accounts along with their own login credentials, which the respondents must maintain for themselves.
- All Census Bureau business surveys will be migrated to this portal over the next couple of years.
- The respondents must enter a 12-digit alphanumeric 'authorization code' found on the mailed survey request to 'link' the surveys to their accounts.
- The Portal also offers many features that once required respondents to call the Bureau or that were previously unavailable such as:
 - Viewing survey Information
 - Requesting extensions
 - Sharing survey access with others in organization
 - A secure messaging center

Usability Testing

- Participants were selected from the 2015 Annual Survey of Manufactures and Report of Organization sample. All interviews were conducted at each participant's place of business.
- Round One** (18 interviews): Portal was tested as one part of the overall online reporting experience along with a written survey request and the survey itself. Testing focused on three major aspect of the Portal: account creation, linking the survey, and sharing survey access.
- Round Two** (19 interviews): Portal was the focus of the testing and participants were asked to perform eight tasks that encompassed all of the major features of the website: creating an account, linking a survey, sharing the survey, locating survey information, locating the FAQs, locating the secure messaging, requesting an extension, and checking the filing status. Lastly, participants completed a user satisfaction survey.

Account Creation



Create Your Respondent Portal Account

1 REGISTER 2 CONFIRM 3 LOGIN

Your account is intended for your use only. Do not share your account information. Once you have created your account, you will have the option to delegate to others to assist you in reporting.

Personal Information *All Fields required*

FIRST NAME LAST NAME
First Name is required Last Name is required

EMAIL
EMAIL is Required and will be your user id

CONFIRM EMAIL
EMAIL Confirmation is Required

PHONE
Phone Required

Security Questions (5)
Questions and answers must be unique. Answers must have a minimum of 4 characters

QUESTION 1: Choose A Question
 ANSWER 1: You must answer all security questions

QUESTION 2: Choose A Question
 ANSWER 2: You must answer all security questions

QUESTION 3: Choose A Question
 ANSWER 3: You must answer all security questions

QUESTION 4: Choose A Question
 ANSWER 4: You must answer all security questions

QUESTION 5: Choose A Question
 ANSWER 5: You must answer all security questions

Password *All Fields required*

Passwords must contain at least twelve (12) non-blank characters. Characters must meet at least three (3) of the following four (4) categories:

- English upper-case characters (A-Z);
- English lower-case characters (a-z);
- Numeric (0-9);
- Non-Alphanumeric (ex. !, \$, #)

NOTE: Passwords cannot contain portions of your email address, your first name.

Show/Hide Password

PASSWORD
Password fields required

CONFIRM PASSWORD
Password fields required

SECURITY CHECK

Select the Lock

Submit

Account Creation

Finding: Participants found the account creation process to be fairly standard compared to mainstream web applications.

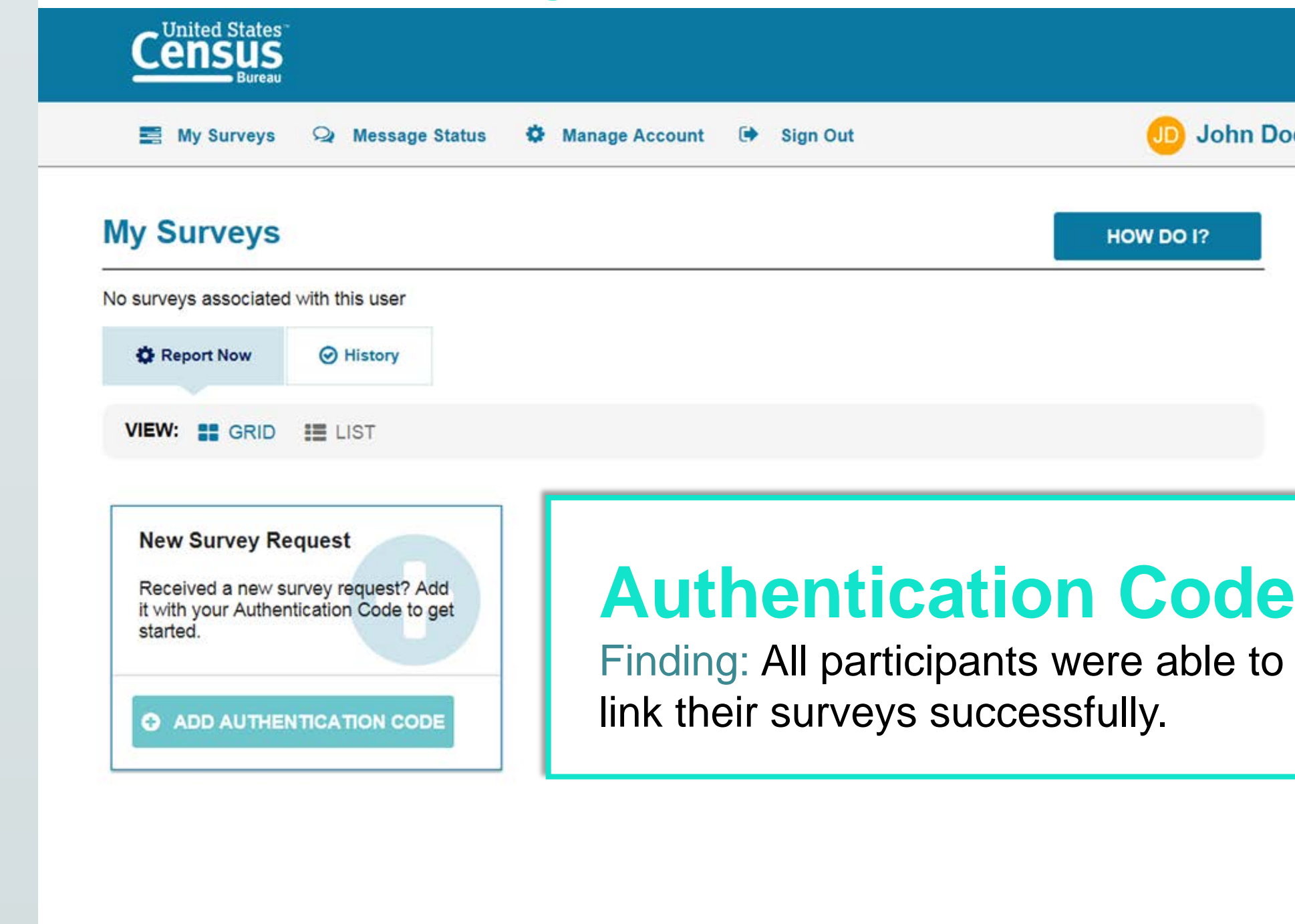
Security Questions

Finding: Participants found having to answer five security questions to be excessive.
 Recommendation: Due to strict security standards, the number of questions was not changed.

Security Check

Findings: Some participants were also confused by the security check, which required them to choose a picture from a set to prove they were human and not a malicious program. Participants did not understand the purpose of the check, and some were unable to complete it.
 Recommendations: Clarify the instructions for the security check and add a short sentence explaining the purpose of the check.

Main Screen for First Login



United States Census Bureau

My Surveys Message Status Manage Account Sign Out John Doe

My Surveys **HOW DO I?**

No surveys associated with this user

Report Now History

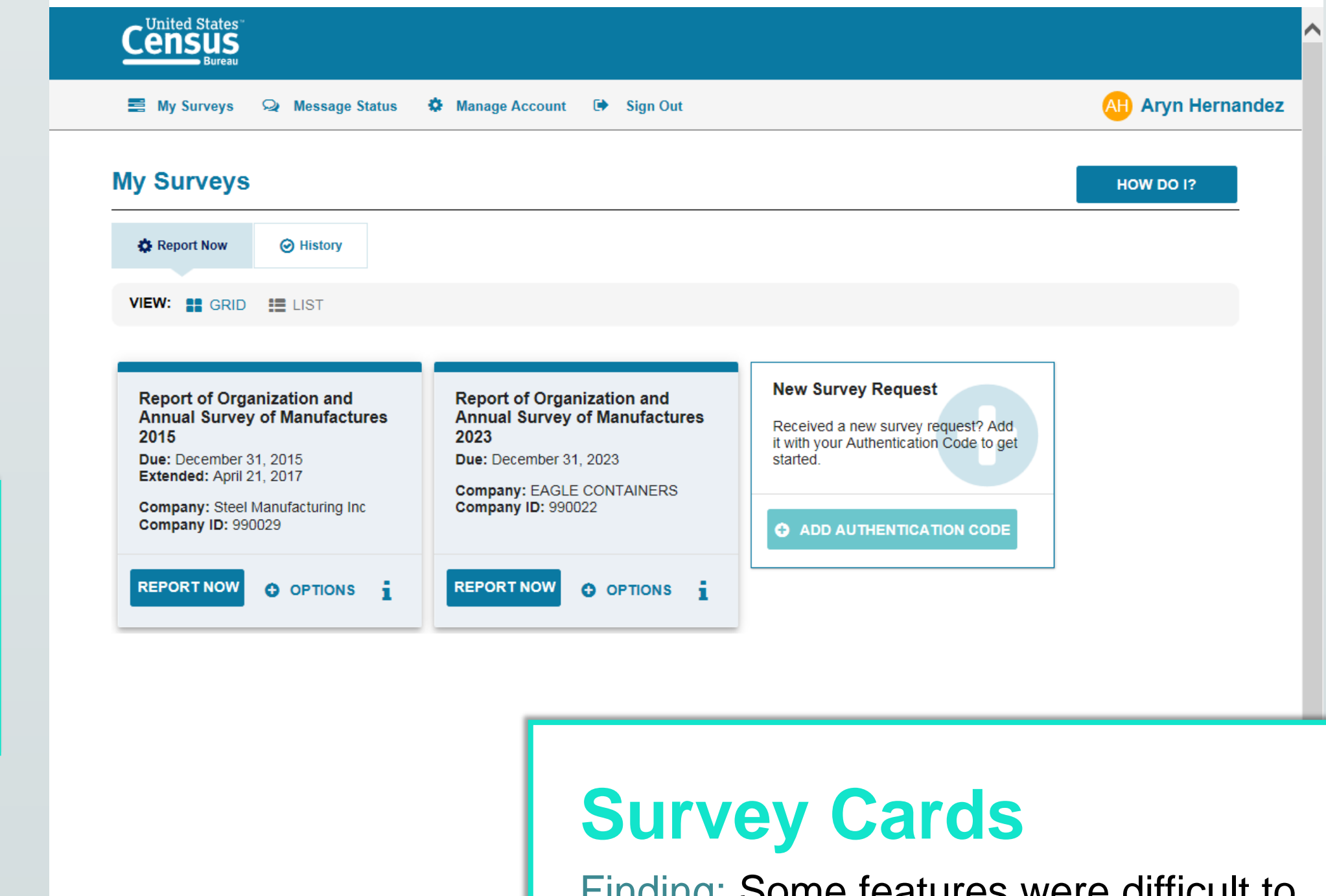
VIEW: GRID LIST

New Survey Request
 Received a new survey request? Add it with your Authentication Code to get started.
 ADD AUTHENTICATION CODE

Authentication Codes

Finding: All participants were able to link their surveys successfully.

Main Screen With Surveys Added



United States Census Bureau

My Surveys Message Status Manage Account Sign Out Aryn Hernandez

My Surveys **HOW DO I?**

Report Now History

VIEW: GRID LIST

Report of Organization and Annual Survey of Manufactures 2015
 Due: December 31, 2015
 Extended: April 21, 2017
 Company: Steel Manufacturing Inc
 Company ID: 990029
 REPORT NOW OPTIONS

Report of Organization and Annual Survey of Manufactures 2023
 Due: December 31, 2023
 Company: EAGLE CONTAINERS
 Company ID: 990022
 REPORT NOW OPTIONS

New Survey Request
 Received a new survey request? Add it with your Authentication Code to get started.
 ADD AUTHENTICATION CODE

Survey Cards

Finding: Some features were difficult to find, as most were located under the 'Options' toggle on the survey card.
 Recommendations: The 'Options' tabs on the survey cards should be toggled open initially, with the option to toggle them closed manually by participants to save screen space.

'Open' Survey Card



Report of Organization and Annual Survey of Manufactures 2015
 Due: December 31, 2015
 Extended: April 21, 2017
 Company: Steel Manufacturing Inc
 Company ID: 990029

REPORT NOW OPTIONS

Request Extension

Share Survey Access

Filing Status

Survey FAQs

Send Message

1-800-233-6136

Task Accuracy

Findings: Requesting an extension was the task with the highest success rate. Locating general survey information had the lowest success rate. Both of these tasks are accomplished by interacting with a survey card.

Button Labels

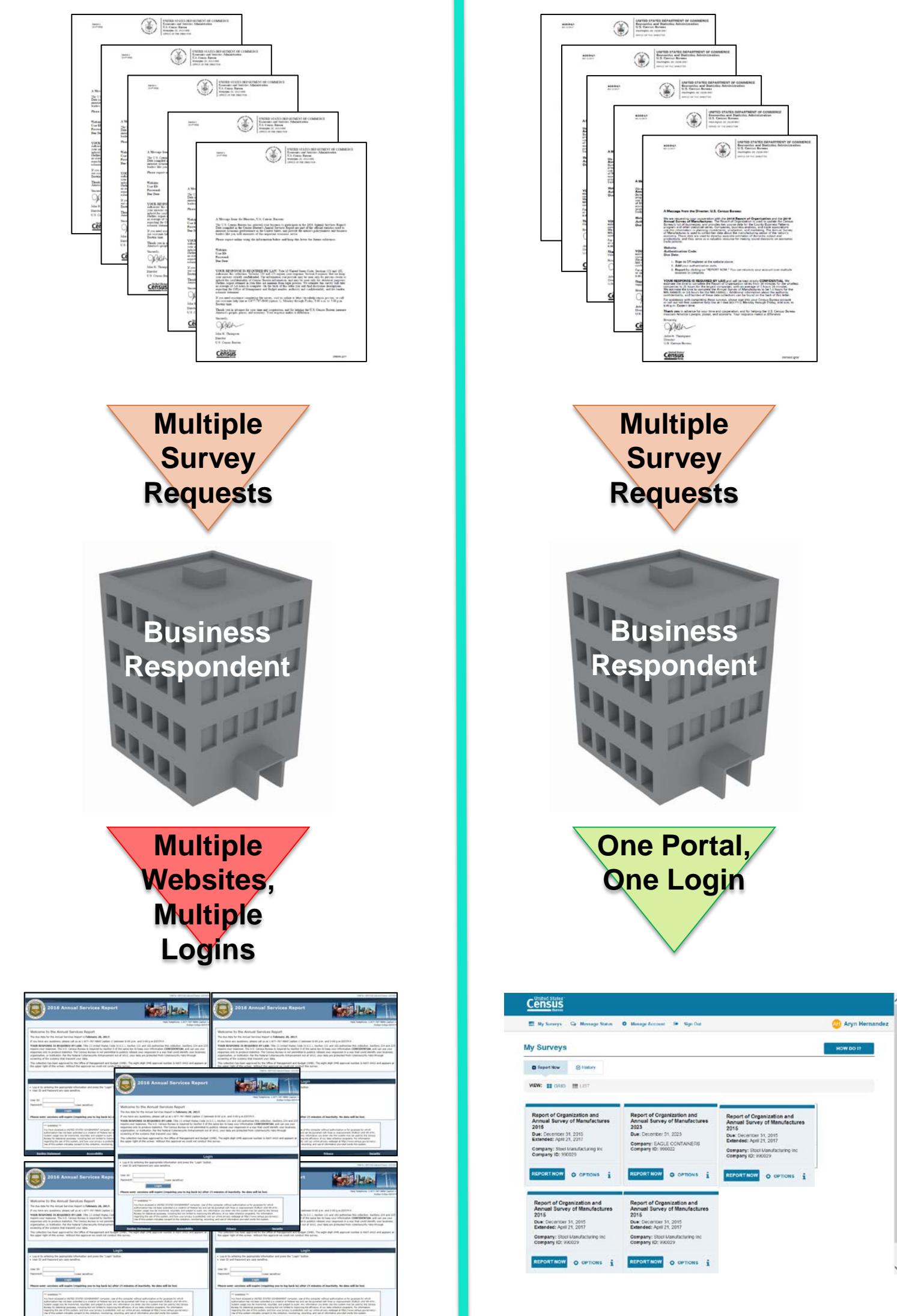
Findings: In addition, some button labels, such as 'Delegate', 'Send Message,' and 'Survey Information,' were ambiguous, making some participants hesitant to click them.
 Recommendations: 'Delegate' was changed to 'Share Survey Access' and 'FAQs' was changed to 'Survey FAQs.' We also recommended changing 'Send Message' to 'Contact Us.'

Overall Satisfaction

Finding: Participants indicated a high level of satisfaction with the Portal, despite difficulties performing some of the tasks. This is likely due to the clean, modern design of the Portal, which may have lowered the perceived burden for many of the participants.

Before Portal

After Portal



Presented at the 72nd Annual Conference for the American Association for Public Opinion Research
 New Orleans, LA
 May 18 - May 21, 2017

Disclaimer: Any views expressed are those of the authors and not necessarily those of the U.S. Census Bureau.

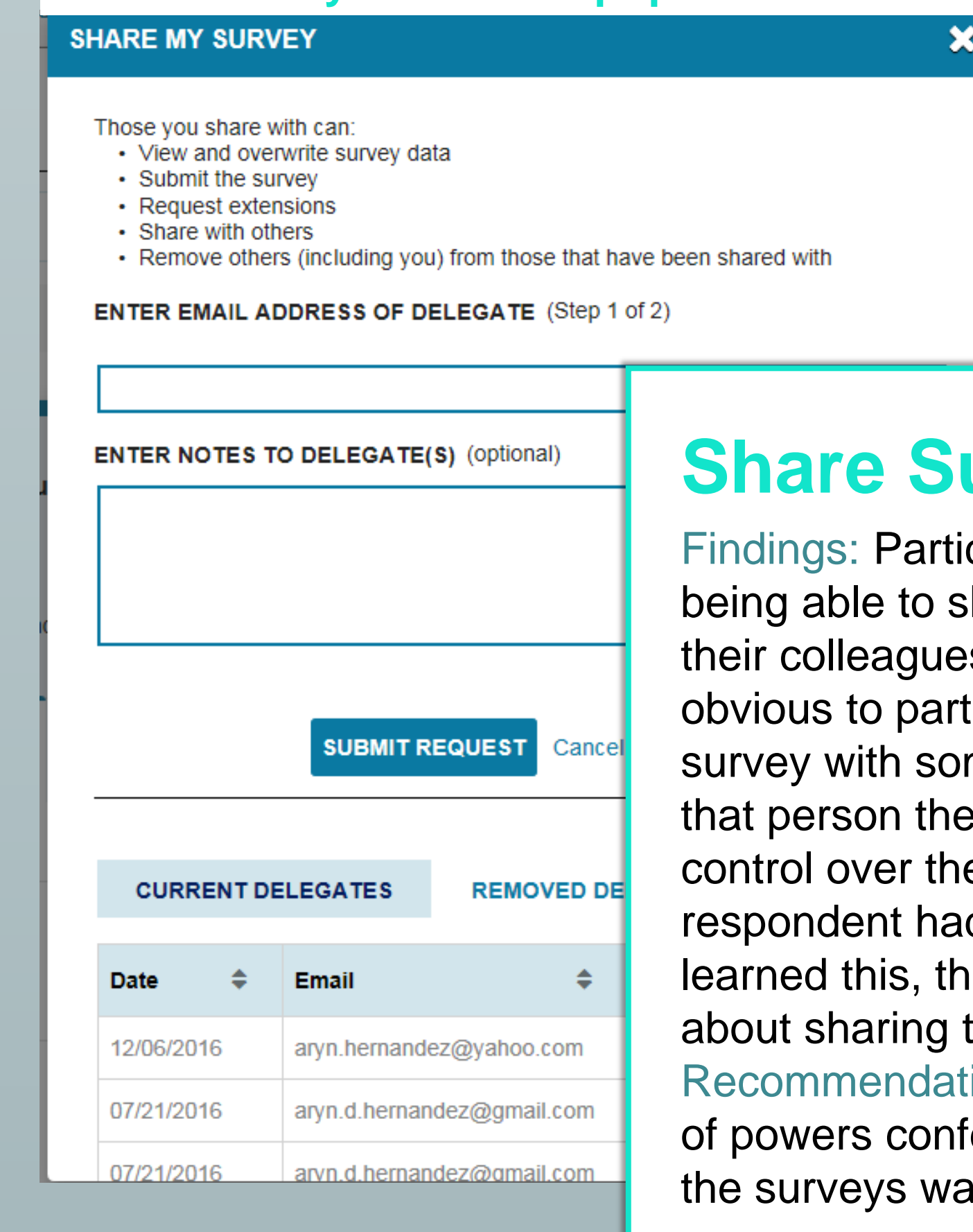
Application for Longitudinal Panels

- Some respondents to the Census' economic surveys must report monthly, quarterly, or annually to multiple surveys. This Portal could allow us to preload surveys for respondents in the future.
- The Portal requires a respondent to enter a valid email address, which can be used to remind respondents when it is time to report via the secure messaging center.
- In addition, there is a password recovery system, allowing respondents to reset their passwords without needing to contact the Census Bureau for a new one.

Current and Future Testing

- The Portal is currently in the field for the first time. We are conducting respondent debriefings over the phone with recent respondents.
- We would like to conduct iterative testing on future versions.
- We would also like to conduct analyses on paradata in the future to determine which features are utilized the most and which are still problematic for respondents.

'Share Survey Access' Popup



SHARE MY SURVEY

Those you share with can:

- View and overwrite survey data
- Submit the survey
- Request extensions
- Share with others
- Remove others (including you) from those that have been shared with

ENTER EMAIL ADDRESS OF DELEGATE (Step 1 of 2)

ENTER NOTES TO DELEGATE(S) (optional)

SUBMIT REQUEST Cancel

DATE	EMAIL
12/06/2016	aryn.hernandez@yahoo.com
07/21/2016	aryn.d.hernandez@gmail.com
07/21/2016	aryn.d.hernandez@gmail.com
07/21/2016	aryn.d.hernandez@gmail.com

Share Survey Access

Findings: Participants liked the idea of being able to share their surveys with their colleagues. However, it was not obvious to participants that sharing the survey with someone else would give that person the exact same access and control over the survey that the original respondent had. When participants learned this, they were much more wary about sharing the survey.
 Recommendation: Add a complete list of powers conferred to those with whom the surveys was shared.