

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

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Presented at 2017 FedCASIC
04/11/2017

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Outline

- Background
- Respondent Portal Features
- Usability Testing: Round 1
- Usability Testing: Round 2
- Current and Future Testing
- Longitudinal Panels

Background

- Issues with current methods:
 - Assigning individual userIDs and passwords for each survey
 - Different URL for each survey
 - Evolving Security Standards
- Solution:
 - One URL
 - One set of login credentials

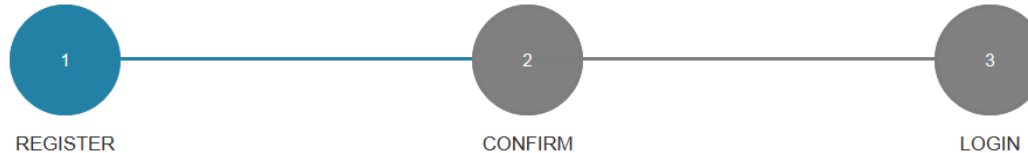
Respondent Portal

- Respondents...
 - must create their own accounts
 - must link the survey to their accounts
 - can view survey Information
 - can request extensions
 - can access secure messaging center
 - can share survey access with others in organization

Account Creation

Create Your Respondent Portal Account

HELP



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

EMAIL

CONFIRM EMAIL

PHONE

Security Questions (5)

All Fields required


Questions and answers must be unique. Answers must have a minimum of 4 characters and are not case sensitive.

QUESTION 1

Account Creation

1. Enter required information:
 - Name
 - Email address
 - Phone number
2. Answer 5 Security Questions
3. Create a password
4. Complete Captcha
5. Validate email address

Respondent Portal



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[My Surveys](#) [Message Status](#) [Manage Account](#) [Sign Out](#) JD 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](#)

Respondent Portal

The screenshot shows the Respondent Portal interface. At the top is a blue header with the United States Census Bureau logo. Below the header is a navigation bar with links for 'My Surveys', 'Message Status', 'Manage Account', and 'Sign Out', along with a user profile for 'Aryn Hernandez'. The main content area is titled 'My Surveys' and includes a 'HOW DO I?' button. There are two tabs: 'Report Now' (selected) and 'History'. Below the tabs is a 'VIEW:' section with 'GRID' (selected) and 'LIST' options. The main content displays two survey cards and a 'New Survey Request' box. The first card is for the 'Report of Organization and Annual Survey of Manufactures 2015', with a due date of December 31, 2015, extended to April 21, 2017, and company information for Steel Manufacturing Inc. The second card is for the 'Annual Survey of Entrepreneurs 2015', with a due date of December 31, 2023, and company information for EAGLE CONTAINERS. Each card has a 'REPORT NOW' button and 'OPTIONS' and 'i' icons. The 'New Survey Request' box contains a message about adding an authentication code and an 'ADD AUTHENTICATION CODE' button.

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My Surveys Message Status Manage Account Sign Out AH 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 i

Annual Survey of Entrepreneurs 2015
Due: December 31, 2023
Company: EAGLE CONTAINERS
Company ID: 990022

REPORT NOW + OPTIONS i

New Survey Request

Received a new survey request? Add it with your Authentication Code to get started.

+ ADD AUTHENTICATION CODE

Usability Testing: Round 1

- Conducted 18 interviews in the field
- Tested as part of overall online reporting experience
- Focused on
 - Account creation
 - Linking survey
 - Sharing survey access

Round 1 Results

- Account creation process fairly standard, with 2 exceptions:
 - Security questions
 - Captcha
- Respondents were able to link survey successfully
- Respondents generally liked the idea of being able to share survey with some caveats

Round 1 Recommendations

- Reduce number of security questions
- Clarify instructions for Captcha
- Clarify amount of access given to those with whom the survey is shared

Usability Testing: Round 2

- Conducted 19 interviews in the field
- Focused on all features of Respondent Portal
- Respondents were asked to perform 8 tasks:
 - Create account, link survey, share survey, find survey information, FAQs, secure messaging, request extension, check filing status
- Retrospective probing concerning specific features and problem tasks
- Satisfaction Survey

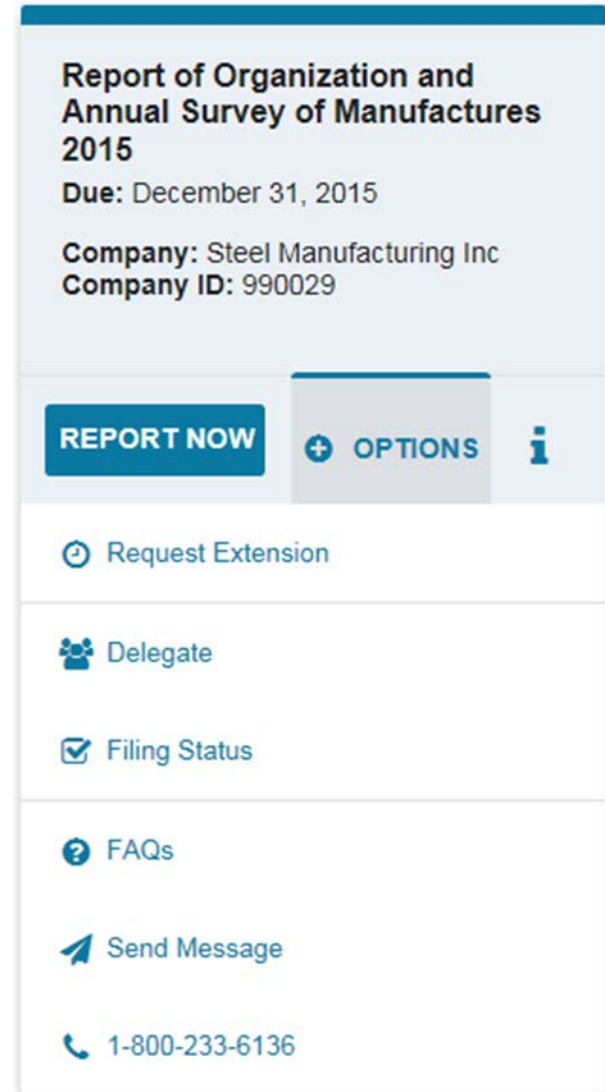
Round 2 Results

- Task accuracy
 - Best: Requesting an extension
 - Worst: Finding the general survey information
- Some features were difficult to find
- Some button labels were not obvious
- “Share Survey Access” got mixed reviews
- Overall, participants were satisfied with the Portal

Round 2 Recommendations



- Have 'Options' tab initially toggled open.
- Change some button labels
- Clarify amount of access given to those with whom the survey is shared



Current and Future Testing

- Currently working on phone debriefings with recent respondents
- Paradata analysis in future

Longitudinal Panels

- Some respondents must report monthly, quarterly, or annually
- Advantages of the Respondent Portal:
 - Respondent email addresses
 - Reminder emails (secure messaging)
 - Password recovery system

Contact

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