Tips & Tricks for Remote Usability Testing for Test Administrators

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United States® Census Bureau

Background

- Usability testing used in survey development at the Census Bureau

- In-person at local community centers, libraries or at Census HQ in Suitland

- Test administrator and participant - "one-on-one"

- Ask participant to complete survey as they would in their real life but while thinking aloud

- When social distancing restrictions due to COVID-19 occurred, we had to adapt our traditional usability testing method of in-person to remote.

Before the session

# Online Remote Usability Testing: Specialized Software

- Conduct remote synchronous usability testing with a software that allows you to see the participants' computer screen

- Familiarize yourself with the software
  - Test on both PC & Mac
  - Does it require participant to download?
    - Skype for Business (download required)
    - Microsoft Teams (no download)
  - Take screenshots of process
  - Consider making annotated document for user
    - Include pop-up windows and security settings

Minimize Software Info in Emails

- Initially we sent an email with instructions on how to download and install the software we were going to use
  - Participant no longer wanted to participate (it was seen as too complicated)
  - Participants said unable to install so would rather withdraw from study
- We modified our email to say that we were going to have a pre-meeting "tech check" that would step them through the process

Software May Not Work on All Devices / Internet Providers

- Work devices
  - May not allow downloads
- Older mobile phones, tablets, chrome books
- Internet providers
  - With screen sharing faster internet = better
  - Slow internet connections can lead to screen freeze/cut out and we would have to wait until it reconnected
  - Made for a longer session
- Mac computers sometimes adds extra security layers

Alert ✕

You have broken software.
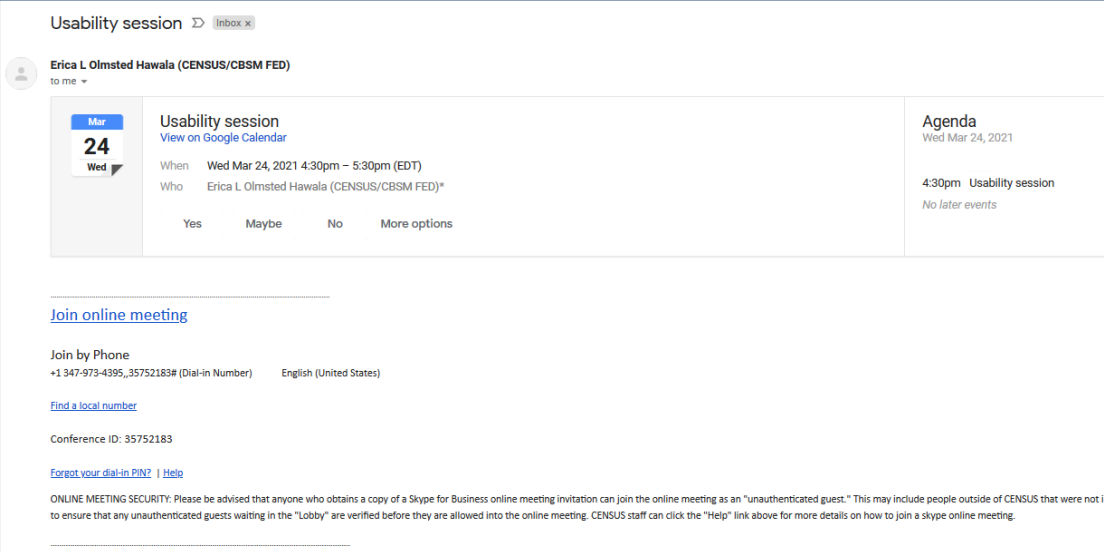
OK

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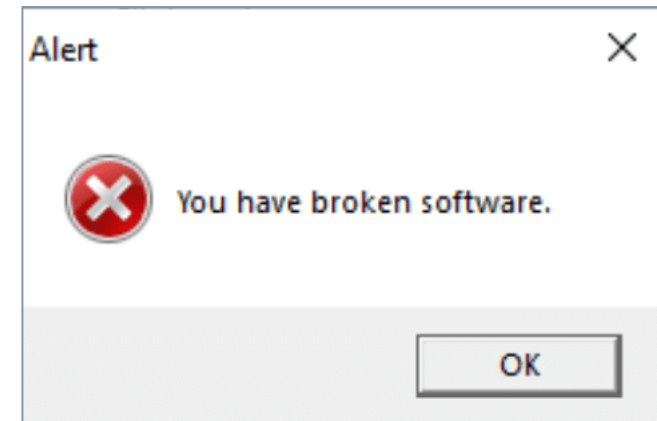
More Communication Touchpoints with Participant

- Initial recruiter contact screener

- Follow up with test administrator email asking for a pre-session technology check & forms
  - Consent form
  - Payment voucher
  - Info about the software you are going to use
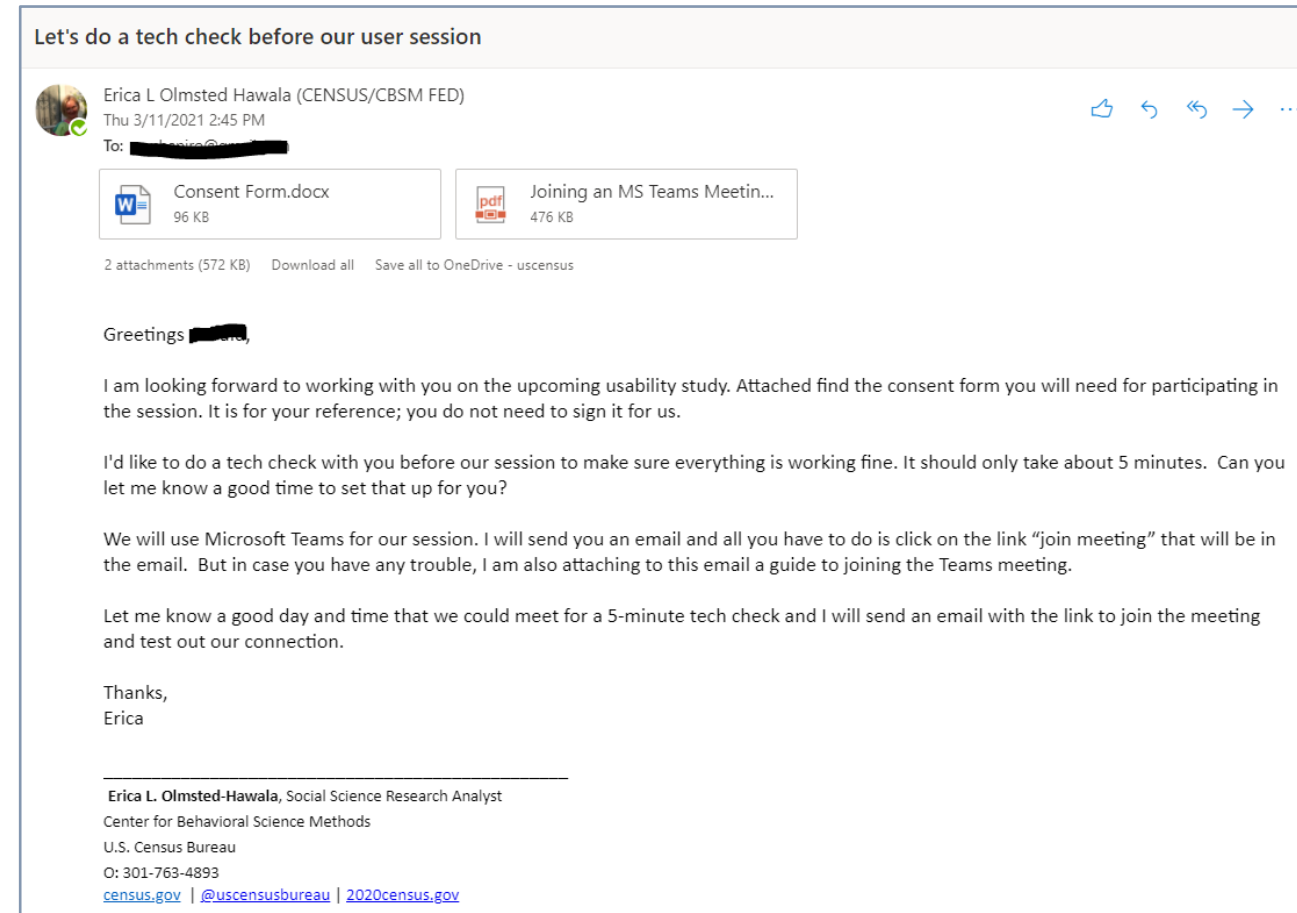
Calendar Invitations

- Set up tech-check with participant
  - Wait until tech-check is successful to set up actual online usability session
- Meeting invitations had links to "join online meeting" which arrive as an email
- May need to talk to user over phone to get them to click on link in email.
  - Once connected need to hang up phones due to echo

During Tech-Check

- Opportunity to build rapport with participant outside of the session
- If software requires download/install - have user download it while on the phone with you so you can talk them through the process & troubleshoot issues
- Have user share their desktop with you
  - Tell them which link / icon to click on, describe what it looks like, where it is located
- If you are going to use the chat feature during session, practice finding and using it
  - Use chat window to share a URL have them click on a link in the chat
- You may have to give them permissions (e.g., make them a 'presenter')
- Verify audio works – you can each clearly hear each other

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More Preliminary Steps & Increased Organization

- Keep organized on differing information on participants and the next steps
  - Follow up emails / phone call reminders if they didn't respond
  - If we had received the signed voucher
  - How they wanted the money sent
  - If tech check was successful
  - Dates forms were sent
  - Date of the actual user session
  - Their address for where to send the $
  - If they had answered pre-session survey questions

Ground Rules for Observers

- Create a set of "Ground Rules" for Observers – email it to team members so they have it
  - Calendar invitation
  - Muting & use of microphone
  - Taking control of computer screen
  - Joining session on time
  - How to relay questions
- Meet with sponsors/observers to practice having them join (on time & muted) trouble shoot any issues they may have (esp if external to the organization)
- Go over how questions will be handled
  - For our studies, we had the test administrator ask the questions
  - Observers had to send their questions to us and then we would ask respondents the question
    - Texted to cell phone
    - Email to team, without participant email on team list

Practice Recording Session

- Snag it

- Camtasia

- Other options – practice ahead of time so there are no surprises.

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Day of actual session

Email / Calendar Invitation

- Send it on the day of the session so it is at the top of their email.

- If you have already sent one when you scheduled the date – you may want to send a reminder day of or day before

WEDNESDAY
24
Usability Ses...
4:15 – 5:15 PM
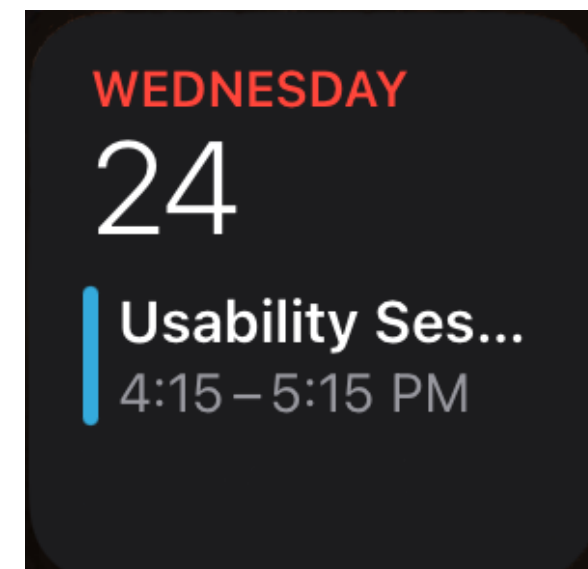
Minimize Number of URLs

- When possible, embed consent, satisfaction, debriefing & other aspects into one URL
  - Send URL via chat
  - Send URL in document ahead of time
    - Participant could access URL prior to the session – sneak peek
  - We did not use email to send the URL because we did not want the participant to have to access their email while we were recording session

Technology Glitches Happen – Be Ready

- Consider using a test administrator and a note taker for each session
- On one occasion, the TA audio went out and the note taker took over – it was smooth transition
- Echo?
  - Tell participant to only use their phone or their computer – not both
- Audio?
  - Should have worked it out during tech check but audio surprises happen and user may need to plug in headphones, plug in speakers, etc.
  - Use chat window or phone line to communicate if you can't hear them

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Sponsor Questions During Session

- Sponsor/observers emailed or texted the test administrator their questions.

- At the end of session test administrator looked at email / text messages

Example of the email the note taker sent at the beginning of session:

From: (note taker's email here)
Sent: Tuesday, June 16, 2020 10:49 AM
To: (observers emails here)
Subject: Re: Confirmed - Homeschool

Hello,

The participant email is taken off.

Use this email to record any questions that you would like Erica to ask at the end of the session. Remember to reply all so Erica only has to review the last version of this email to see the questions.

If you are worried about replying to the email during the session feel free to text Erica your question during the session: xxx-xxx-xxxx

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O: 301-763-1724 | M: 240-691-3589
census.gov | @uscensusbureau
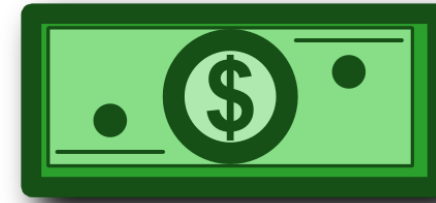**Shape your future. START HERE>** 2020census.gov

Multiple roles? Divide tasks.

- Test administrator
  - Spoke with the participant
  - Built the rapport begun during tech check
  - Checked email/smartphone at end of session for questions
- Note taker
  - Recorded session
  - Started email thread for sponsor questions
  - Sends money
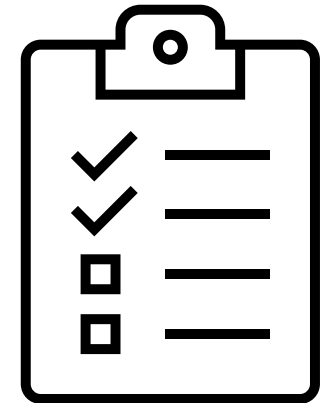
Post session

Handling Money Remotely

- Needed to send money to participant – but we couldn't use newer technology to do it electronically
  - We had to use USPS priority mail / certified mail
  - Needed a signed voucher
  - Timeframe (researcher goes once a week to post office)

Example of the email we sent the user after we had been to the post office and sent the envelope to them.

From: Erica L Olmsted Hawala (CENSUS/CBSM FED)

Sent: Monday, June 15, 2020 4:58 PM

To: --->

Subject: Envelope placed in mail today - thanks for your help!

Greetings NAME,

Thanks again for helping us with the usability study.

The USPS priority mail envelope was mailed today.

The Tracking # is: XXX XXXXX XXXX XXXX XXXX XX

Let me know if you have any questions,

Erica

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Summary

- Remote testing can be an effective way to do usability testing

- New tasks to do before, during & after the session

- Still get quality user feedback on product

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Questions?

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