My Service Canada Account Website Testing

Final Report

Submitted to:

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EKOS

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Introduction

The federal government launched Service Canada on September 14th, 2005, marking a tangible step forward in improving government services to Canadians.

The goal of Service Canada is to provide easy-to-access, one-stop, personalized service. Service Canada is bringing Government of Canada services and benefits together through a single service delivery network. Canadians can access services by their channel of choice, whether by phone, Internet, mail or in-person.

As part of the Internet channel, Service Canada is scheduled to launch progressive iterations of My Service Canada Account between fall 2005 and summer 2006. This service will offer Canadians highly personalized single-window access to secure online services from all federal departments who are Service Canada Partners — with a multi-year, end-state vision that would include personal services from all levels of government. My Service Canada Account will allow individual citizens to view their personal records and transact online with multiple federal organizations in an effective way.

The initial vision of My Service Canada Account will be a staged approach and will eventually pull together several of Service Canada's existing e-services functionality into a common My Account template. The existing e-services will also be governed by a single login (as opposed to the multiple logins which are currently in existence). In its later stages, the smart technology used by My Service Canada Account will be able to assess which services are applicable to each client and will dynamically present only those services which are applicable.

With the launching of the Service Canada website, there was a need to test the My Service Canada Account part of the website from a usability perspective. Within this context, a series of initial focus groups was undertaken to evaluate this part of the website. In broad terms, the purpose of the focus groups was to:

• Obtain the general views of EI/CPP/OAS recipients and contributors on the "My Service Canada Account" concept;

• Test the navigation and functionality of the My Service Canada Account part of the broader Service Canada website; and

• Test comprehension of terminology, descriptions and other-related issues.

Methodology

The research involved a total of four focus group discussions undertaken the week of September 19th, 2005 in Halifax and Montreal. The Halifax groups were conducted in English and the Montreal groups were conducted in French.

The website was tested by having the focus group moderator show participants the website through large-screen projection, as well as distributing paper hand-outs of the specific pages observed during the session. The groups lasted two hours and were held in dedicated focus group facilities. All participants were offered a $50 honorarium.

Each focus group contained a mix of participants from the website's current target audiences:

• **Recipients:** Canadians receiving an Old Age Security (OAS), Canada Pension Plan (CPP) or Employment Insurance (EI) pension or benefit, aged 25 to 70; and

• **Contributors:** Employed Canadians contributing to EI and / or CPP (but not receiving a benefit from either program), aged 25 to 70.

In order to obtain a certain level of homogeneity in terms of the computer/Internet skills and experience of focus group participants, individuals were segmented into "low to moderate comfort online" and "high comfort online" groups. The specific composition of the focus groups is summarized in the following table.

Location	Date	Group 1	Group 2
Halifax	Sept. 20th, 2005	Low-moderate comfort	High comfort
Montreal	Sept. 21st, 2005	Low-moderate comfort	High comfort

To the extent possible, it was ensured that the groups included a reasonable cross-section of people, based on gender, ethnicity, family composition and age. For the focus groups conducted in French, EKOS ensured that participants were comfortable participating in a focus group in French.

It should be borne in mind when reading this report that these findings are drawn exclusively from qualitative research. While every effort is made to balance various demographic characteristics when recruiting participants, these groups (and therefore the findings drawn from them) may not be said to be representative of the larger population as a whole. While groups generally indicate appropriate directionality, they do not serve as a proxy for a fully representative quantitative methodology. For the reader's ease, these findings are depicted to some extent as definitive and "projectible". This is, however, true only for the universe represented by these participants.

Key Findings

Broad Experience

Consistent with the broad trends observed in the Canadian public, many of the focus group participants were experienced Internet users, who had conducted a fair number of transactions online, including Internet banking and e-commerce. Against this backdrop, it is important to recognize that the My Service Canada Account website was being compared and evaluated, in terms of its usability, against the growing number of private sector applications which currently enable online transactions.

When asked what specific characteristics make certain websites that enable online transactions better than others that do the same, participants overwhelmingly emphasized the stronger websites were easy to use, and both clear and simple.

While not all participants had conducted government transactions online, the vast majority had some experience visiting Government of Canada websites. Their views ranged from positive to negative, with a common thread of an excess of information on many. With the exception of a small number of participants citing difficulties with tax filing online, most participants who had conducted transactions online with the Government of Canada portrayed their experiences as satisfactory.

A Single Online Account for Citizens

As a starting point, the concept of a single online account for all interactions with the Government of Canada had tremendous resonance for focus group participants. This support was typically bolstered by two lines of reasoning: first, the premise is both easily understood and many examples already exist (e.g., My MSN, participants already accessing all their banking, credit card, loan accounts, etc. through Internet banking); and second, participants often held the view that it is difficult to conduct various types of transactions with governments.

Since considerable research has been undertaken by the federal government in relation to epass over the past few years, the concept was only raised broadly in the focus groups and was intended only to set the context for the rest of the discussion.

Consistent with some of the other research, it is worth reinforcing that expectations with respect to how long it would take to obtain a secure username/password tend to be out of line with the time it would take in reality. In fact, most participants thought they should be able to obtain a secure username/password in a matter of minutes. Combined with the fact that many participants do not immediately see a strong need to regularly login to a federal government website (as compared to a banking website), the findings reinforce the need to both simplify the online authentication process and to ensure that there is a strong value proposition to end-users as the next iterations of "My Service Canada Account" are developed. In the Montreal focus groups, participants suggested they wanted to be able to select their own usernames and passwords.

The Service Canada Homepage/Accessing "My Service Canada Account"

While the focus of this particular research study was on the My Service Canada Account section of the Service Canada website, it nonetheless made sense to begin the focus groups by gauging reaction to the Service Canada homepage, as this typically would be the entry point into the My Service Canada Account section. The main findings on this page were as follows:

- The Service Canada homepage is generally well laid out.

- However, participants pointed to a need to increase the visibility of the entry point into the My Service Canada Account section. In fact, many did not know where to click when asked go to My Service Canada Account. This uncertainty reflected two issues: first, there is no reference to My Service Canada Account on the Service Canada homepage, rather, it says "Access On-line Services"; and second, the link is at the bottom of the page and less visible [Figure 1].

- In the shorter-term, possible solutions to the lack of visibility of the My Service Account entry point may be to change the name of this link.

- In terms of future iterations, many participants felt that this link should be given more profile either in its design or by moving it to the top of the page. These views were largely driven by the perceived usefulness of the idea of My Service Canada Account in general.

My Service Canada Account

While it is recognized that this is the first iteration of the My Service Canada Account section of the Service Canada website, the findings from the focus groups pointed to a number of key considerations.

The most important finding was that there is a big gap between expectations relating to the premise or idea of My Service Canada Account, and what the website actually offers at this stage. The gap was more evident in the Halifax groups compared to the Montreal groups, in part reflecting that they had a little less context behind the concept[1]. Nevertheless, the reactions in the Montreal groups were more likely to be either one of being indifferent or unimpressed rather than a positive reaction to the website. The results obtained in both focus groups also point to the same broad findings. Disappointment over the early stage of the website relative to its potential end state can be lessened by conveying more about the current version of the website and its future plans. This has clear implications for the marketing strategies of Service Canada and the My Service Account website (discussed in the conclusions and recommendations), as well as for the information that is provided on the website itself.

Other key findings included the following:

- Closely related to the gap between expectations and experiences, it was not clear that the current design of the My Service Canada Account is essentially a preliminary version, and that future iterations will be both entirely different and vastly more comprehensive. In other words, participants did not know to expect any changes to the website in the future.

- At the same time, most participants were familiar with options on websites which allow them to be personalized and customized, naming examples such as MSN and Yahoo. In their view, however, the My Service Canada Account section of the website did not offer any possibility of personalization or customization despite its labelling (<u>My</u> Service Canada Account). As one participant remarked, "This isn't My Service Canada Account, it is Everybody's Service Canada Account".

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[1]   In Montreal, the moderator spent more time at the start of the discussion explaining that the website is in the early stages of development.

- Similarly, many participants naturally expected a place to login to their account to be able to conduct their transactions online (i.e., a clear starting point to login to My Service Canada Account).

- After exploring the website, the more experienced and savvy Internet users realized somewhat quickly that this was not a single online account, but simply a set of links from existing federal government websites. The less experienced users were more confused about the layout, and struggled due to the inconsistent approach to design and layout of the subsequent pages. Clearly, some participants did not realize they had been lead to pages from other government department websites. As such, there was confusion about the instructions on the subsequent pages.

- While many of the participants were impressed with the concept of My Service Account Canada, after visiting the website, most were either disappointed or generally unimpressed. They felt that the title My Service Canada Account over-promises, and under-delivers. The "change a person's address/direct deposit" link highlighted this limitation; not only is it not possible to update an address/direct deposit information in a single transaction, but it is only possible to do so in relation to Employment Insurance (EI) and Old Age Security (OAS) / Canada Pension Plan (CPP). As one participant remarked, "they should drop the My Service Canada Account label until they have it ready. It has nothing to do with being personal …"

- Montreal participants agreed that the website's current title: Mon dossier Service Canada was preferable to using "compte" as an alternative to "dossier". They felt that "compte" had too much of a banking or retail connotation and felt "dossier" better conveyed the idea of a unified personal information file.

- In terms of looking forward, there was strong interest in being able to personalize certain aspects or include reminders tailored to them (e.g., your passport expires in XX days). Similarly, the concept of being able to streamline the information contained in an individual's account had resonance (i.e., an individual will view only information that they want/select when they log in). That said, it is important to recognize that many potential users do not expect to use their My Service Canada Account as frequently as other online applications such as Internet banking. As such, consideration should be given to finding a way to entice users to the website regularly in the future in order for these types of personalized features to be useful and effective. For some participants, this could be addressed through sending an individual an email to go and log in to their account. Based on other research that EKOS has conducted, we would anticipate that not all Canadians would like such an approach and a model based on consent/buy-in would be necessary.

Layout of the My Service Account page

A number of other issues were raised with the actual layout of the page itself.

- There was a tendency to see this page as an On-Line Forms and Services page, and not an electronic My Service Canada Account page. This reinforces the need to more clearly identify the page, by choosing one or the other title and not trying to have both. This, of course, will tie into the naming of the link on the Service Canada homepage [Figure 2].

- It was not immediately clear for many participants what they could do once they got to the My Service Canada Account page. Consideration could be given to inserting a page in between the current Service Canada homepage and the My Service Canada Account section with simple instructions about what can and cannot be done on in this section. In particular, one participant wondered if they would be able do something relating to a small program (e.g., such as renewing a camping permit). While recognizing that it is not a large-scale program compared to EI or CPP, this participant said it would be extremely frustrating if this type of smaller program is not part of a personalized My Service Canada Account for them. Another example of not knowing exactly what you can do on this website relates to the change of address. As mentioned, a user can update their address relating to EI or CPP/OAS from the start page, but not with the Canada Revenue Agency (CRA). However, there is a link to updating your address with the CRA by navigating through the A to Z section.

- While the four subsections title on the page ("View, change, report:", "Apply for:", "A-Z Index of Forms and Services" and "My Advisor") are relatively clear, many participants did not always fully understand or like them. This was evident, for example, by the fact that some participants mistakenly thought that there would be relevant links for services that are not federal (e.g., department of motor vehicles).

- The "View, Change, Report:" subsection is relatively clear, although some participants struggled the meaning of "report" in this context. The rationale behind including only the four links was not always clear, and participants noted considerable overlap between these links. For example, there are two links relating to Employment Insurance (EI) along with a third link in the Apply for EI section. Similarly, if a person clicks on "view my EI information" and "change my address or direct deposit information" and then EI, they end up at the same page. This section should be re-examined.

- The "Apply for:" section is relatively easy to understand, although a number of participants wondered why a link to "Canadian Agricultural Skills Service" was listed. First, it was the only link not in alphabetical order. Second, it raised questions about why other small programs were not also included.

- The "A to Z Index of Forms and Services" is also relatively easy to use and understand. Most participants leaned towards keeping forms and services together, and not separating the two. Generally speaking, participants believed that all information or links relating to a particular activity should be located together. It was commonly suggested that alphabet links should appear at the top of the page allowing users to go to keywords beginning with that letter, rather than having to scroll through the whole page. Some confusion also existed because the website is supposed to be a "one stop" website, but there is reference to the Canada Site website. As one participant remarked, "If this is a one stop website, why is there another website?" [Figure 3].

- The "My Advisor" section generated the most negative reaction, particularly in Halifax. To begin with, it was not seen as "Advisor", but more a list of frequently asked questions. It also raised a number of questions about why those particular links were included, and why other interesting questions were not included.

- Given the fact that many individuals rely on search functions when navigating various websites, some participants felt that the search box on this page should be made more visible.

Subsequent pages

The research also pointed to findings relating to the website's subsequent pages.

- There was a general sense that the subsequent pages were not well integrated into the Service Canada website [Figure 4].

- This, in part, reflects the fact that the subsequent pages have not necessarily been designed to reflect the My Service Account Canada context. As such, some participants found they were lacking the context information necessary to proceed. For example, when participants clicked on "Apply for: Employment Insurance Benefits", the link directs them to the existing page on the HRSDC website. On this page, the fourth link down is "Before you start", which prompted one participant to

wonder why they had not been directed to this page initially. Likewise, the "Apply for: Passport" link leads to a form which refers to "using epass Canada". As the mention of "epass Canada" prompted one participant to wonder "what is this all about?" this is an example where there is a lack of context information.

- Another issue is the inconsistent approach to format, layout and design of the subsequent pages. For example, the left hand menus are not consistent on all subsequent pages. Sometimes, the subsequent page has a left-hand menu starting with "Our Minister". Other times, there is no left hand menu. Within this context, there is a strong need to review how these subsequent pages have been incorporated into the website, both in terms of design and layout as well as the way the pages are structured to ensure a more consistent flow between My Service Canada Account website and the Government of Canada webpages that it links to.

- While not all participants felt that the pages should be identical in terms of layout and design, many believed that the current contrasting designs, layouts and even styles (i.e., a lot more text is used on these pages) made them more difficult to use.

- Participants also noted that there is no way to return back to the Service Canada website once a on a subsequent pages.

Conclusions and Recommendations

This website testing was a preliminary examination of the public's reaction to the My Service Canada Account section of the Service Canada website. Despite the fact that this is the first iteration of the website and that it will evolve dramatically over the next year or two, it is still important to remember that this part of the website is live and a part of the Service Canada online presence. With this in mind, the research pointed to a number of conclusions and recommendations.

- The concept of the My Service Canada Account itself is very strong. Not only is there strong resonance to the concept, the premise is easily understood due to existing examples (e.g., MSN, Yahoo, online banking customization options, etc.). As such, Canadians will have definite expectations about what they should be able to do on a "personalized" website.

- However, as it is designed in this first iteration, there is a gap between expectations relating to the premise or idea of My Service Canada Account and the utility actually provided by the website. Participants noted that the My Service Canada Account is neither personalized, nor customizable at this point. As one participant remarked, "this isn't My Service Canada Account, it is Everybody's Service Canada Account". As such, there was a general feeling that the label My Service Canada Account oversells the website, and has the potential to disappoint. The gap between expectations and the perceived utility of the website is greater if individuals have the impression that the website is already a fully developed "one-stop" website rather than in its first iteration (i.e., how the website is promoted).

- Because Canadians are likely to react extremely positively to the concept of a personalized and customized website, it will be important to market and promote that aspect of the Service Canada website in the future. However, for the time being, the My Service Account Canada is now live in its first iteration, and the website will evolve considerably over the next year and two. In its current stage, the website is unlikely to match up with expectations about a "personalized" website for many Canadians. This suggests downplaying the concept and potential for My Service Canada Account in the shorter-term, as the developmental work continues. In more general terms, it will be important that the marketing for My Service Canada Account is consistent with the stage of development of the website.

- For the time being, consideration should be given to removing the "My Service Canada Account" labelling from the website until a subsequent iteration has been developed and there is capacity to actually personalize the website.

- Likewise, consideration should be given to changing the labels that suggest a personalized website such as "My Advisor".

- While the layout of the My Service Canada Account page is somewhat easy to use, the individual sections are not well explained in terms of what users can and cannot do on the page and within each section. Within that context, consideration should be given to inserting a page between the Service Canada homepage and the My Service Canada Account page which provides more information on the current functionality of the page and plans for the future, and more details about which programs are available and will eventually be part of the service (i.e., many people would expect to find tax-related information here given that it is such a significant part of their interaction with the Government of Canada).

- There is also a strong need to examine the pages from other departments that My Service Canada Account links to. In most cases, there is, at a minimum, a need to significantly rework the text to give proper context for those entering the page via My Service Canada Account. And while not an important consideration for all focus group participants, consideration should be given to streamlining the subsequent pages to better match the Service Canada website in terms of layout and design (or at least accelerating this work). At the very least, this would expand the impression of a "one window" website. Such changes would also make it far easier to navigate for those less sophisticated users of the website and those with more limited knowledge of Service Canada/the Government of Canada's programs and services.

Screenshots

Figure 1: Service Canada Home Page
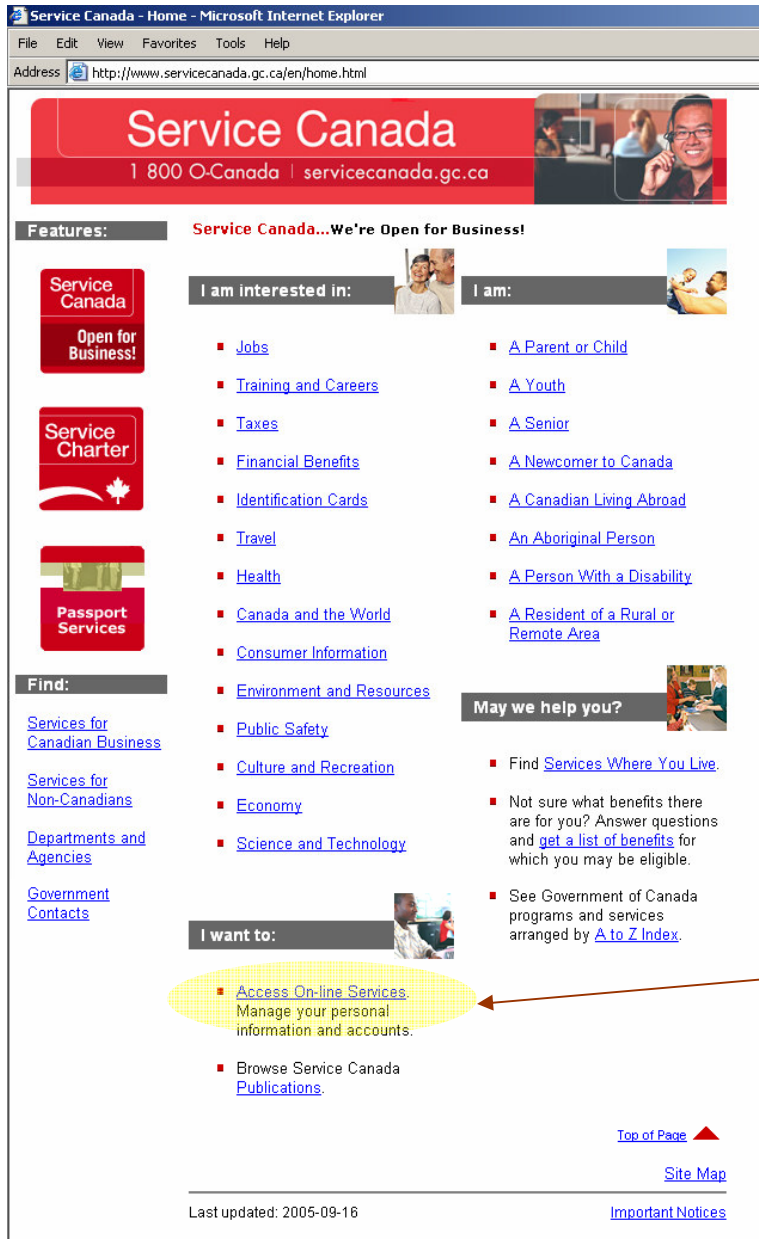
The current point of entry has very low visibility.

In fact, many participants did not know where to click to access the My Service Canada Account page.

Figure 2: My Service Canada Account

Is this an On-Line Forms and Services page or My Service Canada Account page? Consideration needs to be given to what this section is called and how it is tied into the page / labeled on the main Service Canada homepage.

It was not immediately clear what a person can do and cannot do on this page. Consideration should be given to inserting a page between the previous page and this page, providing context and more background information.

"My Advisor" is not the right name for this section. Participants believed that this was more like "Commonly Asked Questions".

Figure 3: A to Z Index

This page would be easier to use if there was a listing of all the letters (A to Z) at the top of the page. This would enable users to select from instead of scrolling through the entire page.

Some confusion existed given that this is a "one stop" website. As one participant remarked, "If this is a one stop website, why is there another website?"

One example of lack of information on what a person can do and cannot do is the change of address tasks. It would appear from the other parts of the website that a user can only update their address for EI and CPP/OAS. However, if a person goes to this section, they are able to change their address with CRA. This is not intuitive for users.

Figure 4: Subsequent pages
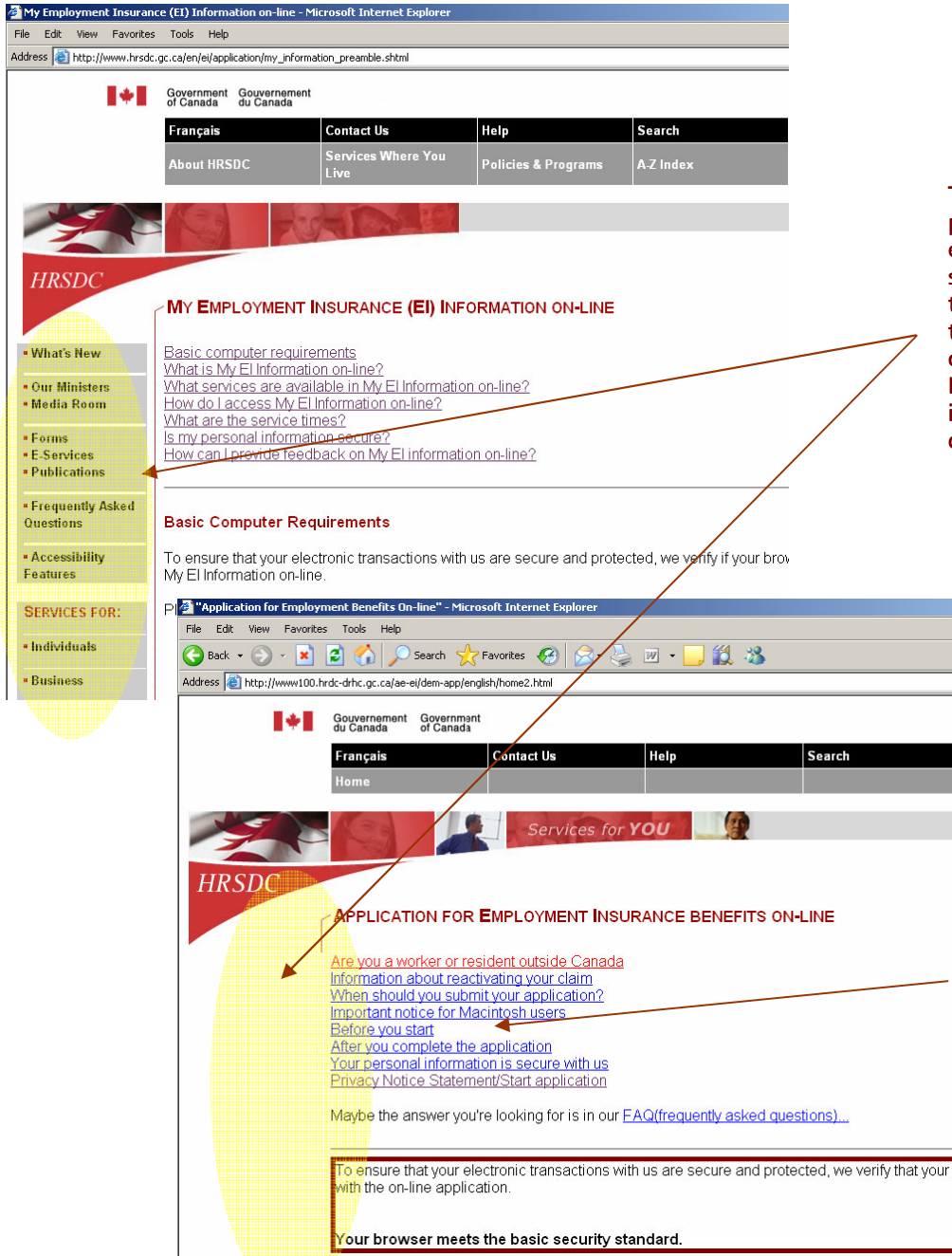
The format of the subsequent pages is inconsistent. For example, sometimes there are side menu bars, and other times there are none. While not all find this difference an issue, others do find it more confusing to use. It also does not give the impression that this is a "single one stop" website.

The subsequent pages are not designed to reflect the My Service Account Canada context. Rather, the pages are from the existing websites of other departments. When a user clicks on these subsequent pages from My Service Canada Account, there is a big disconnect.

For example, when participants clicked on "Apply for: Employment Insurance Benefits", the link directs them to the existing page on the HRSDC website. On this page, the fourth link down is "Before you start", which prompted one participant to wonder why they had not been directed to this page initially.