

Introduction

This is the report of Usability Study Phase I, the first of two initial testing phases of the **bswift** online enrollment software, version 5. The report details a Heuristic Evaluation conducted, using an established set of usability principles to examine segments of the software, in order to identify usability flaws.

Phase II will be a usability test employing task scenarios, in order to observe users' behaviors while they perform tasks within the online enrollment environment.

Heuristic Evaluation

Methods

A Heuristic Evaluation is testing of a product or website conducted by multiple experienced evaluators, as “different people find different usability problems.”¹ A Heuristic Evaluation was conducted on the **bswift** enrollment software (<https://secure.bswift.com/default.aspx?abbrev=iit5>) to familiarize the URL consulting team with the online enrollment process. The outcomes of this process will guide the **bswift**'s design/development team's initial improvements to be made to the software prior to the roll-out planned for August of 2013. The results will also help to inform the URL consulting team as to the procedures they will ask participants to perform during the usability test conducted in Phase II.

The evaluation centered on the following actions needed to be carried out by a typical user, to enroll in health insurance:

- Login to the site
- Select one of three health plans & choose benefits
- Add dependents
- Confirm election
- Print confirmation page

Heuristics Used

¹ http://www.useit.com/papers/heuristic/heuristic_evaluation.html

Each action listed above in *Methods* section was checked separately using the list of heuristics below as a general guideline (from Chisnell, Redish, and Lee, “New Heuristics for Understanding Older Adults as Web Users,” 39):

1. Use conventional interaction elements
2. Make obvious what is clickable and what is not
3. Make clickable items easy to target and hit
4. Minimize vertical scrolling; eliminate horizontal scrolling
5. Ensure that the Back button behaves predictably
6. Let the user stay in control
7. Provide clear feedback on actions
8. Provide feedback in other modes in addition to visual
9. Make the structure of the Web site as visible as possible
10. Clearly label content categories; assist recognition and retrieval rather than recall
11. Implement the shallowest possible information hierarchy
12. Include a site map and link to it from every page
13. Make pages easy to skim or scan
14. Make elements on the page easy to read
15. Visually group related topics
16. Make sure text and background colors contrast
17. Use adequate white space
18. Make it easy to find things on the page quickly
19. Focus the writing on audience and purpose
20. Use the users’ language; minimize jargon and technical terms

These heuristics were developed specifically with older adults in mind, though the usability principles apply as well to younger populations. The heuristics consist of four categories: (1) interaction design heuristics, (2) information architecture heuristics, (3) visual design heuristics, and (4) information design heuristics. Interaction design heuristics are concerned with the interaction between the user and the site; for example, clicking on links and providing feedback to the user. Information architecture heuristics are concerned with the layout of the site; for example, is the structure of the site clear to the user? Visual design heuristics are concerned with how the site appears to users; for example, is there enough white space? Are related items visually grouped together on the page? Information design heuristics focus on the actual site content; for example, is the writing focused on the appropriate audience? Is the use of jargon minimized?

Please note that failures are cited more frequently than successes in the report. The purpose of this is to focus on the elements of the site and steps in the process that should be addressed first in any site redesign.

Severity Rankings

Key:

G = good; the element or process meets the heuristic requirements.

NI = needs improvement; the element or process should be redesigned or reevaluated.

F = fail; the element or process fails one or more of the heuristic requirements.

Findings and Recommendations

Step 1: Login to the Site—Home Page and Login Process (see annotated screenshot)

- Login box
 - **Login button (G)**: easy to read and find quickly.
 - **“First time user” link and “forgot password” link (NI)**: small relative to the login button and are difficult to see; the blue font on the light blue background also hinders visual recognition; both links should probably include question marks (i.e., “First Time User?” “Forgot Password?”) as they are asking the user questions.
- Acme Benefits Portal Box
 - **Heading (NI)**: could be more descriptive; it is a little unclear what the purpose of the site is. For example, include a subheading “Your space for health insurance enrollment” or something that indicates to the user what the purpose of the site is.
- “Need Help?” Box
 - **Text content (NI)**: will “SAP personal ID #” be understood by all users? Text is crowded; perhaps increase font size and spacing.
- “First Time User?” Box
 - **Text content (NI)**: it is confusing to have a link for “First Time User” in the login box and then a box that asks if the user is a first time user. Perhaps rename the heading (e.g., “Login Instructions”) or just move the instructions into the login box.



Could be more descriptive; what is the benefits portal?

Log In

Username

Password

Log In

[First Time User](#)
[Forgot Password](#)

Welcome to the Acme Benefits Portal



Good

Link is hard to see

Confusing

First-time user?

To access the site, please use the following:

Username: Your Acme Company SAP ID with leading zeros
(This number may be found on your paycheck.)

Password: The last 4 digits of your Social Security Number
(You will be required to change your password after your initial login.)

Hard to see

Place below username box?

Place below password box?

Need Help?

If you need assistance with your SAP Personnel ID #, please contact an HR Service Center representative at 1(800)555-5555. Representatives are available Monday through Friday from 8:00 a.m. to 5:00 p.m. CST.

Crowded text; Jargony?

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