

MEPS (Centurion) Usability Testing Draft Protocol

(This protocol is a guide – the questions presented here won't necessarily be asked exactly as worded in the protocol or in this order. It is important to note that not all questions will be asked in every interview.)

Part A – Introduction

1. Introduce observers and their background

2. Purpose of visit:

Let me start by telling you a little about what we will be doing today. The Medical Expenditure Panel Survey – Insurance Component (MEPS-IC) is mailed out annually in order to collect information about health insurance plans offered, benefits associated with these plans, and related information.

In the past, respondents will could only report their data on paper, but starting this year you will have the options to report either on paper or through the Internet. Since this is the first time we're doing this survey electronically, we want to get your feedback in order to make revisions before it is formally released.

3. Permission to audio-tape discussion? Have R sign consent form.

Before we get started: I'd like to audio tape this interview, so I don't have to rely on my memory later. This session is confidential. Only persons connected with this project will have access to your tape. If that's all right with you, please sign this consent form. It also tells you about the confidentiality of this session.

Part B – Background Information

1. Respondent Background

- Can you tell me a little about your company? What products or services does it provide?
- What is your role in the company?
- What has been your overall experience with completing the MEPS-IC?
- Have you completed any other government surveys? If so, which ones?

2. Electronic Reporting Background (if reported to other government surveys)

- Did you reported electronically to any of those surveys?
- What made you choose to report electronically?
- What was your overall experience? Did anything stand out as being very helpful? Was there anything that you didn't like?

- What benefits would there be to reporting a survey like the MEPS-IC electronically? What drawback?

Now I'd like to show you an electronic draft of the MEPS-IC form. Here is the web-site address for accessing the survey (*show the respondent the URL, test username and test password*).

I would like you to go through the electronic version of the survey and complete it as you normally would. This is not a test of your ability or Internet savvy, so just proceed in whatever way makes the most sense to you. If you need to get information from records or others within the company in order to answer a question, just let us know what you would need to do.

Don't hesitate to tell me anything you find surprising on the site, or if you have questions about the material on the site, just ask. We'll try our best to answer your questions.

Part C – Testing

(Note: The primary interview technique is retrospective; R is asked about each question and/or group of questions after s/he has reported. Concurrent “think-aloud” probes are used when R indicates some confusion or other problem, e.g., by frowning, re-reading a question, looking away in thought, saying “Hmm”, etc.)

3. Username/Password Screen

- Do you think that the information given on the Login Screen was sufficient?
- Do you think that the graphic used to show the location of the username and password on the paper form is helpful? Could we show anything else on this screen that would help you locate this information?
- Is there any other information you'd like to see on the Login Screen?

4. Main Menu

- Can you describe to me what each of the three sections/boxes is showing you?
- Do you think that the labels that are used match the information that is shown within each section/box? Do you have any suggestions for more appropriate labels?
- Where do you need to go in order to start filling completing your form?
- Was this clear? If not, what could be done to make the start of the form clearer?
- In your own words, what are the options available within the toolbar at the top of the page? What would you get or where would you go if you clicked on them?
- If you wanted to glance at the help instructions before starting the form,

- where would you go?
- Is there anything else that you would need at this point in order to start completing the form? Anything else that should be included on this screen?

5. Form-Specific section -- TBD

- Form-specific probe -- tbd
- Form-specific probe -- tbd
- Form-specific probe -- tbd

6. Form-Specific section -- TBD

- Form-specific probe -- tbd
- Form-specific probe -- tbd
- Form-specific probe -- tbd

7. Form-Specific section -- TBD

- If you needed to return to a prior section, how would you do this?
- Did you have any problems navigating back to a prior section/screen? Do you have any recommendation for improving the navigation within the site?
- Form-specific probe -- tbd
- Form-specific probe -- tbd
- Form-specific probe -- tbd

8. Form-Specific section -- TBD

- *(If the R hasn't triggered an edit at this point, have them do so on purpose)*
- Is it clear to you based on the messages you are receiving on the screen that there is an issue? Can you explain to me what the problem(s) are?
- Is there a better way that we could notify you about the problem(s) on this screen?
- What would you need to do if you wanted to ignore the problem message you were receiving and move on to the next questions? Is it clear to you what action you need to take?
- What does the 'Update Page' button at the bottom of this screen mean to you? What do you expect it to do? Please click on it and tell me if this is what you expected to happen. Is this option helpful to you?
- What other information should we provide to you about your problems and how to correct them?
- Form-specific probe -- tbd
- Form-specific probe -- tbd
- Form-specific probe -- tbd

9. Form-Specific section -- TBD

- Form-specific probe -- tbd
- Form-specific probe -- tbd
- Form-specific probe -- tbd

10. Check / Finish

- What are your first thoughts when seeing this screen?
- Can you explain to me what is expected of you? What is this screen telling you?
- *(If there are edits)* How will you go about fixing this/these problem(s)? When you have finished fixing the problems, what do you need to do next? How will you submit the form?
- What do you think of the title of this screen? Is it a logical title?
- What other types of review would you be interested in performing prior to submission?
- Does having the option to review a PDF of your information at this time make sense?
- If you weren't ready to submit your data at this point, what would you do?

11. Completion Certificate

- Is there any other information that you would need to have for your completion?
- Would you save a copy of this information for your records?

12. Main Menu (after submission)

- Would you save a copy of your data for your records?
- Where would you need to go on this site in order to do that?
- What is the difference between the PDF and HTML options? Which one would you prefer and why?

Part D – Wrap Up

- Now that you have gone through this form electronically, would you prefer to do this survey on paper or electronically?
- Do you think that you would complete the online form in one sitting?
- If you were completing this form electronically, would you still want/need the paper form? If so, what purpose would the paper form serve?
- Now that you have gotten a good feel for the online form, what is your overall impression of it? Was it easy, hard?
- Did you have any issues with the navigation on the site?
- What are some of the things that you liked the most about the online form?
- What are some of the things that you liked the least about the online form?
- Are there any other options that we should provide in the online form?
- Do you have any suggestions for how to make this online form easier for you to use?

Thank participant for their time and input!