

2022 NAPCS Usability Evaluation Testing Protocol

1. Participant Background

- How long have you been with the company/in your current position?
- What is your title/role?
- What are your major responsibilities?
- Are you typically responsible for completing surveys like the Economic Census?

2. General Probes (Use these whenever necessary)

- In your opinion, are the information and instructions on this screen helpful or not helpful?
- Can you tell me what you are thinking about?
- Can you tell me more about that?
- I want to make sure I understand; can you explain that again?
- Reflect back on R's answer ("I want to make sure I have it right. I think you said, "...?")

3. NAPCS Background

4. Can you tell me about your process for filling out Economic Census?

a. Additional probes (if necessary):

- i. Was that your first time filling out this survey?
- ii. What was your role completing the Economic Census? Are others involved in helping gather the data? If so, Did you complete Item 22 which asks about the *Details of Sales, Shipments, Receipts or Revenue* in the 2017 Economic Census survey? –may reference content that was emailed if needed
- iii. How do you typically gather the data for this survey item?
- iv. Did someone else have to review the data for this survey item before you submitted it?

Now I would like to ask you specific questions about this survey item. Please open the attachment/ click on the link that I sent you via e-mail (if haven't already done so).

5. Item 22 (Part A)

- In your own words, what is the purpose of this survey item?
- Describe to me how you reported to this item?
 - a. Via the spreadsheet or form (screen by screen) view?
 - Tell me about your past experience reporting to this survey item? Any recommendations for improvements?
 - How easy or difficult was it to find the services/products that you needed to report?
 - Please tell me about how you went about identifying your products/services for the items that were listed.
 - Were certain items harder to answer than others? If so, why?

- Were the products/services listed relevant/applicable to your company? Did they accurately reflect your products/services?
- To what extent did the descriptions used for your pre listed products/services match the way your business describes them in your records?
- Were you able to report all of your products/services from the listing? Were there any missing?
 - If so, how did you account for the products and services that were not pre listed?
- Is there a criteria you used for deciding which products/services to identify?

Machine learning

- Let's say that a product/service for your establishment is not on the listing, how would you proceed? *Present option A and B to respondent (random)*
 - Option A: What do you think is the purpose of line item #X?
 - Option B: What do you think is the purpose of the *Add additional products/services* button at the bottom of the screen? What do you expect to happen upon clicking on this button?
- Preference: Which option would you prefer to use to write in additional products/services that you did not find on the listing. Why?
- Any thoughts on having the ability to type in products/services not listed on this screen?
- Would you be able to select a check box for a pre listed description and enter another product/service in the field that isn't listed?
 - What makes you think that is/is not an option?
- What could you type/enter in the field?
- Is it clear whether there is a criteria for the types of products/services you should enter?
- (If applicable) Are there any words you may be inclined to use from your past experience with this survey?
- Alternative A (no interactive machine learning functionality): Let's say someone entered (X- varied write in response by industry) into the field because they did not see it on the pre listed products/services for their establishment. After typing in those keywords and clicking on the *Save and Continue* button to proceed, what would you expect for them to see next?
 - The survey presents the respondent with the following screen. Is it clear what happened here? Describe.
- Alternative B: Describe to me what you may enter based on your establishment.
- Let's enter those words from this screen. After typing in those keywords and clicking on the *Save and Continue* button to proceed, the survey presents you with the following screen. Is it clear what happened here? Describe.
- What are your thoughts on the results displayed including the following:
 - Relevancy of responses?
 - Description?
 - Order?
- Is it clear that there is a criteria for the types of products/services you should have entered?
- Based on the results presented, how would you report?
- Are the instructions clear? What should you do on this screen?
 - Any thoughts on the display including the number of results displayed, order, details provided, or instructions?

- How would you go about making a selection from the results displayed on the screen?
 - o Are there any additional details that may be helpful in making a selection?
- How many do you think that you can select from the list displayed?
- If the results returned no descriptions that matched well to the product/service entered, how would you proceed?
 - o *Note if the respondent indicates that they would try to accessing additional results or use the Not applicable option.*
- If you entered the wrong words resulting in results that were not applicable, how would you proceed?
 - o If needed, how would you generate a new search?
- Do you think there may be limits on the type of searches that can be generated? Tell me more.
 - o Abbreviations?
 - o Product codes?
 - o Multiple products?

6. Item 22 (Part B)

- Now I would like for you to navigate to *Item 22 Details of Sales, Shipments, Receipts or Revenue*
 - In your own words, what is the purpose of this screen?
 - o Do you think anything is missing from this screen? (e.g., expectations)
 - Any thoughts on this screen? What is it showing you/asking you to do here?
 - Are the products/services you added available?
 - o Is this how you would have expected them to appear?
- Are you able to make changes to the product/service you added?
- How would you change a product that was added?
 - o Note if the respondent chooses to go back and make a change on the search screen or if they would like the ability to retype their entry here.

Wrap-up

- Do you have any final recommendations or comments on any of the screens we went over today?

This concludes our meeting. Thank you for your time and valuable feedback.