XR Converter Tool Testing Plan

Updated April 13, 2023

Context

The launch of the [Currency Exchange Rates Converter Tool](#) in March 2023 was the result of numerous requests from the Fiscal Data website's user base for a way to access foreign currency exchange rates outside of using the Treasury Reporting Rates of Exchange (TRRE) dataset page.

For this study, the team wants to understand if the requirements initially defined for this tool satisfy the needs of the public user base, as well as identify areas for improvement and additional resources to increase the utility of the tool.

Objectives

The purpose of this study is to gain a deeper understanding in the following areas:

- Uncover any previously undiscovered usability issues that people may have been experiencing since the launch of the tool.
- Compare and contrast people's reactions to the designs for an edge case where the converter tool displays a message informing them that the exchange rate data for a given currency is unavailable for a certain date.
- Discover additional resources and/or features that would be useful to our target audience when included alongside the currency converter tool.

Research Questions

- What were people using prior to the release of the converter tool?
  - What resources did they use alongside the prior tool?
  - What advantages does the prior tool have over our tool?
- How well can people navigate to the tool by themselves?
- How well do they understand the constraints around this tool?
  - How well do people understand what the copy conveys?
- What are people doing with this tool?

- o What are some unexpected use cases?
- o How well do people understand the interactions afforded by this tool?
- o How well are people able to recover from warnings and errors?

Metrics

We will observe and assess participants' ability to perform their given tasks against the following criteria:

- o Navigation/Discoverability
- o Copy Clarity
- o Error Recovery
- o Task Completion Rate

This quantitative data will supplement our understanding of the accessibility and usability of the tool.

Methodology

We will conduct 30-minute virtual task-based think-alouds to ensure that the tool aligns with people's mental model. The remainder of the session will make use of the semi-structured interview format to further explore people's expectations and hopes for the tool.

Technology

- o Microsoft Forms – Survey
- o Microsoft Teams – Test Session
- o Microsoft Word – Notetaking
- o Calendly - Scheduling

Recruitment

Target Audience

Tax preparers, CPAs, and taxpayers who are required to file FBAR to declare foreign financial accounts to the Treasury department.

Participants

See Airtable for participant data.

Outcomes

- o Artifact with analysis of participant feedback.
- o Recommendations for improvements and new features/resources to consider for the future.