PRS Referral Queue Prioritization Card Sort (WIP)

We use card sorting in general to help us understand how users organize, collect, and prioritize information they need in order to meet their goals. In this epic, we want to understand how much information people really need in a referral queue. This specific card sort centers around asking users to prioritize the items they might encounter in the referral queue.

Research goals

Through this card sort, we will learn the following (from the epic's research goals):

- Understand the priority of information needs, for example, the critical pieces of information that users need to make decisions such as to pick up a case off the referral queue.
- Understand what information providers need to see in the referral queue in order to accept a case, and then to assign it to case managers
- Understand the impact that the referral queue might have on an improved experience (including users who need to accept cases)

Approach

We plan to use Optimal Workshop's OptimalSort. We will asynchronously ask people to categorize a list of existing and possible column names that could end up in the PRS Referral Queue solution. The card sort type is a hybrid card sort. This means that we ask users to sort cards into categories we have created. They can also create their own. We also make sure we orient them to the sort and give them assurance that this is an official survey.

This link provides a non-live, non-data collecting preview with the most up-to-date design and content.

Card sort preview
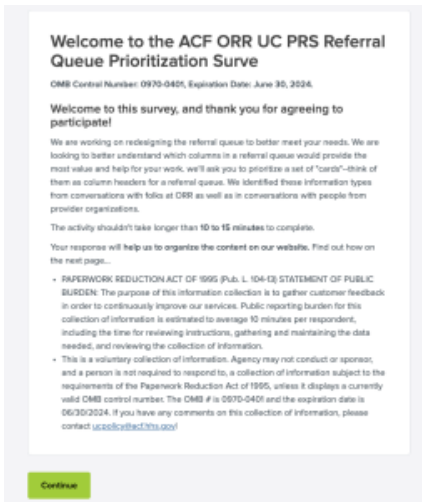
Sample screenshot of the first page users see

Card Candidates

We ask candidates to sort these items into areas of priority. This table shows the existing columns as well as a selection of possible column candidates. To ensure we balance completeness with difficulty, we limit the number of total cards to sort to 20 cards.

Existing columns	Additional candidates
Referral ID	
A #	
Program (residential)	
First Name	
Last Name	
Date of Birth	
Address	
City	

State	
Zip Code	
Referral Date	
Type of Home Study (just for HS queue)	
Home Study Provider (just for PRS queue)	
Relationship Group ID	
Level of PRS (just for PRS queue)	
TVPRA	
	Expedited Case
	Sponsor Category
	Preferred Language
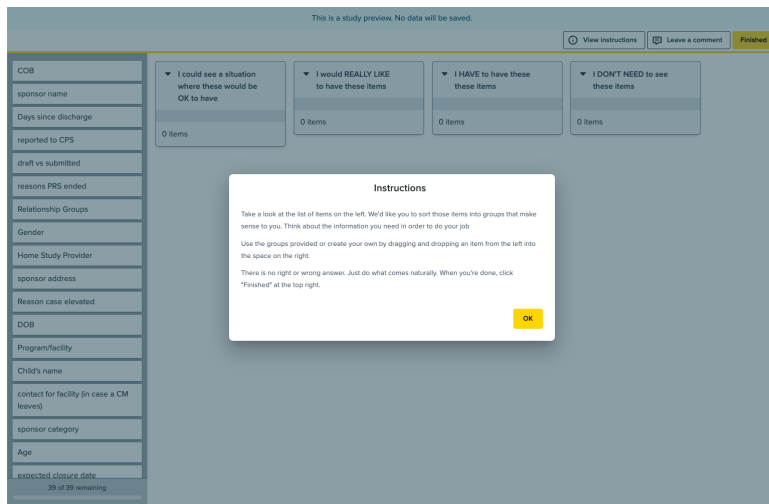
Screenshot of the what users see once they enter the sort
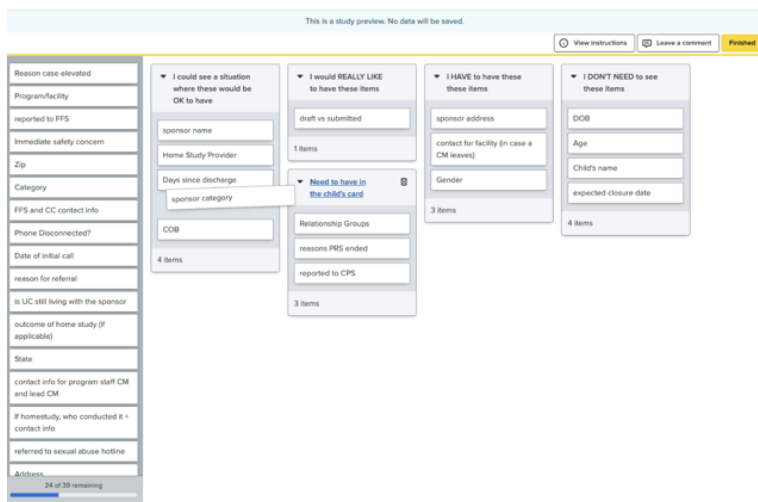
Screenshot of how users sort cards.

Categories

We present these four categories, looking to learn a hierarchy of priorities.

- *I HAVE to have these these items*
- *I would REALLY LIKE to have these items*
- *I could see a situation where these would be OK to have*

- *I DON'T NEED to see these items*

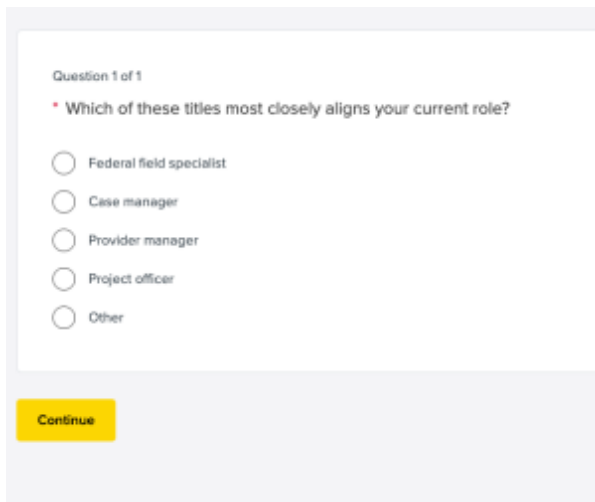We make these categories verbose so that it's clear to users what we mean.

Questions

We as a question before users enter the card sort, and we ask two questions after they finish. This approach allows us to understand some of the context that users exist in as well as giving them a chance to provide affinity feedback to the PRS referral queue. At the same time, the limited number of questions reduces the burden on users completing the sort.

Presort Question

After the welcome message, we ask users to identify themselves based on role titles. We don't want to collect any PII, and we want to reduce the survey's complexity.

> *Q: Which of these titles most closely aligns your current role?*
>
>> ○ *Federal field specialist*
>> ○ *Project officer*
>> ○ *Provider supervisor or director or similar*
>> ○ *Case manager*
>> ○ *Other (with a text box)*

Question 1 of 1

* Which of these titles most closely aligns your current role?

○ Federal field specialist

○ Case manager

○ Provider manager

○ Project officer

○ Other

Continue

Screenshot of the presort questions users see

Postsort Questions

After users finish their sorting, we ask them these two questions, one a closed-ended question, and one an optional open-ended question.

> *Optionally, after thinking about these items you just categorized, what are three or four things you'd **absolutely need** to see in the list...but didn't? (As a reminder, here's an image of the items that were in that list)*
>
>> ○ *Multiline text field*

Optionally, after thinking about these items you just categorized, what are three or four things you'd **absolutely need** to see in the list...but didn't?
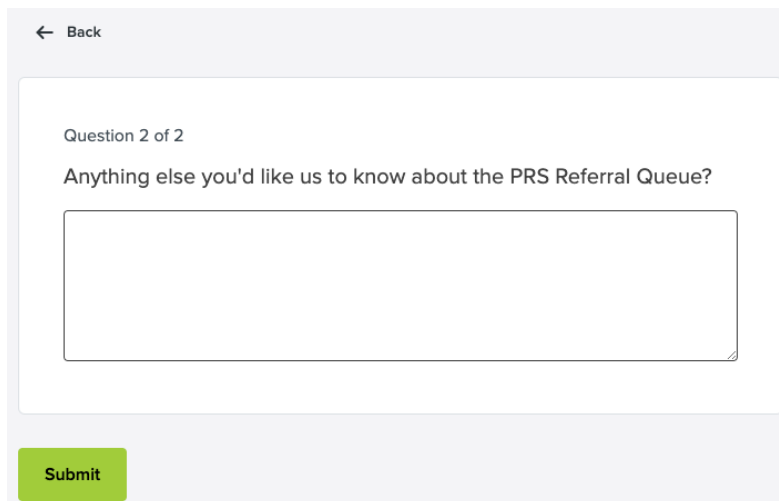
(As a reminder, here's an image of the items that were in that list)

Referral ID	City	Relationship Group ID
A #	State	Level of PRS (just for PRS queue)
Program (residential)	Zip Code	TVPRA
First Name	Referral Date	Expedited Case
Last Name	Type of Home Study (just for HS queue)	Sponsor Category
Date of Birth		Preferred Language
Address	Home Study Provider (just for PRS queue)	

Screenshot of the first postsort question users see

Optionally, anything else you'd like us to know about the PRS Referral Queue?

[multiline text box]

← Back

Question 2 of 2

Anything else you'd like us to know about the PRS Referral Queue?

[multiline text box]

Submit

Screenshot of the second postsort question users see

All done, awesome! Thanks again for your participation. Your feedback is incredibly useful in helping to determine how to prioritize the mos important information you need so that you can more easily do your work.

Feel free to close this window or navigate to another web page.