

Usability Study: Court users - Petitions QC and other associated flows

Research Plan

This research will take place during Sprint 20 February 2023 - March 2023	
Related Story	Other Notes
Story 5817	

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Overview & Purpose

Background information on why this research is needed

The purpose of this research is to discover any pain points users may have completing an end-to-end QC of an e-filed petition and other associated processes. Since e-filing was a new feature made available to ePortal and not previously existing in the platform, UX would like to validate the user experience and process flows to ensure it meets the users' needs. GTT stakeholders have one story at this time which outlines the following objective:

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- Understand user workflows and usability concerns related to generating case inventory reports that the current functionality does not encompass.

Research Goals

Overall aim or vision to outline the purpose of our work

1. **Discover any issues users have completing an end-to-end QC of an e-filed petition**
2. **Discover any issues users have entering and processing a paper petition and associated documents**
3. **Determine if users can locate and complete an Order during the Petition process**
4. **Understand processes surrounding the Petition QC Process**

Guiding Questions

Overarching “big picture” questions we want to answer through this research

* These questions will not be asked directly to users. Interview guide is outlined below.

- Are users able to successfully enter statistics information during the Petition QC process?
- Are users able to serve the Petition successfully?
- Are users able to locate the Petitions they have already served?
- Are users able to locate where to add a petition received in paper?
- Are users able to enter metadata and upload all documents?
- How are users handling the Notice of Receipt of Petition?
- How are users identifying and tracking which Orders are needed?
- Does the user know how to create and serve any Orders associated with the Petition?
- Are users able to capture all data points in the petition process?

Research Methods

How we will approach our research to gather the information we need

- 1:1 facilitated interviews
 - Duration of 45 minutes

- Scheduled remotely via zoom

Engagement Groups

A list of people we will speak with to learn more about their experiences

In order to gather diverse perspectives from people that utilize ePortal, we will meet with 3 users with representation from the following category:

Interviewee Participants	
User Type	Approx. # of participants
Petitions Clerk	2
Petitions Supervisor	1

Recruitment Email

Email template for scheduling interviews with participants

Subject: Scheduling Interviews for Petitions QC Research

Hi _____

Our team is currently seeking to better understand the processes around Petitions QC and associated flows at the Georgia Tax Tribunal and would like to invite you to give your feedback. The purpose of this research is to better understand your challenges with the Petition QC process and, more specifically, to identify ways to improve this process. If you are interested, I would like to schedule a 45-minute discussion with you via Zoom and get your thoughts and feedback. Please let us know a few times you would be available from [DATES]

If these days or times don't work, please let us know, and we'll do our best to accommodate your schedule. Thank you, we greatly value your feedback and time.

Regards,
Lia

Interview Guide

Questions we will reference to guide our conversations with users

Intro Script

Hello! My name is _____. I am a UX Researcher/Designer working with the Georgia Tax Tribunal and I want to thank you for agreeing to spend time with me today. I have my colleague and UX Designer here _____. She may chime in with questions of her own throughout our conversation.

The purpose of this meeting is to get feedback about a new feature we are working on. We want to gather more feedback about the Petitions QC process in the ePortal to help inform our designs. We will be asking you a series of questions and at the end, you will get a chance to bring up topics we didn't that are related to the Petitions QC process and associated flows.

Feel free to be as open and candid as you like and don't hold back your opinions. Participation in this interview is completely voluntary and optional. You can terminate the session at any time for any reason. Your responses are confidential and when the findings are reported, they will be aggregated and anonymized so that nothing that is said can be tied directly to you.

Would it be okay if I record this meeting for note-taking purposes?

Any questions before we get started?

Introduction

1. What is your current role with the Georgia Tax Tribunal? How long have you been in this role?

[Ask to share screen OR Give mouse control]

e-File

1. Can you walk me through how you initiate serving an e-file petition?
 - a. Have there been times where you have been unable to serve an e-filed petition? Please explain.
2. How do you validate the information entered in the "Parties" tab when submitting a petition for review?
 - a. How do you handle a spouse who lives in a separate address?
3. How do you validate the information entered in the "case info" tab?
 - a. Probe about how they handle the petition fee section. When do they receive the information that goes in that field?
4. If you did not make a selection for IRS Notice Provided, how would you check for this information?
 - a. Do you find this information in the PDF? Do you get it from another source?
5. After selecting yes [for IRS notice provided], how do you process the information entered in the IRS notice section?
 - a. Are there any particular pain points for you during this process?
6. What actions, if any, do you take on the Review and Serve Petition page?
7. Once you have served a petition, where would you go to find it again?
8. What does it mean to have a document in the "In Progress" tab of the document QC?
 - a. Are there any challenges that prevent them from getting served?
 - b. What is the process around petitions in progress?
9. [For Supervisor ASK]
 - a. Are there any challenges with assigning or tracking the documents in the section QC?
 - b. How are clerks assigned petitions (e.g. do some clerks only do e-file or only do paper?)

Paper Filing

1. Can you walk me through how you initiate serving a paper petition?

- a. Have there been times where you have been unable to serve a paper petition? Please explain.
2. What are the challenges you encounter when entering all relevant data while QC-ing a petition?
3. What are the challenges you encounter when uploading all necessary documents while QC-ing a petition?
4. Are the challenges you encounter when entering relevant statistics during the paper filing process different than when e-filing?

After Serving

1. How are you handling the Notice of Receipt of Petition?
2. How do you currently identify and track which Orders are needed?
3. How would you create and serve an Order that is associated with the Petition?
 - a. Can you walk me through an example?
4. Are there any additional steps after a petition has been served?

Conclusion

- What do you like most about the Petitions QC process? The least?
- How would you improve this?
- Is there anything else you would like to share?

Outcomes

What will come out of this research

The research gathered from this research will provide feedback to inform enhancements to the design and flow of the Petitions QC process in the ePortal.