

# Deferred Payment Agreement Calculator User Testing Plan

## Introduction

We are committed to developing the Deferred Payment Agreement (DPA) Calculator to best meet user needs. This is central to the principles within the GDS Design Manual and Local Digital development. With this in mind it is essential we engage in user testing of the product, to test both the proposition of the tool, and also capture ideas to make it as easy to use as possible.

## Test Objectives

- To find out if users understand the proposition of the DPA calculator
- To obtain feedback on the language used and clarity of the descriptive furniture text and instructions used in the calculator
- To observe how users interact with the calculator and to test if they can use it to complete a calculation and interpret/manipulate the results

## Participants

Each local authority should aim to complete this task assessment with **at least 8 participants** who should be representative of the user group for the DPA calculator:

- adults over the age of 18,
- to include both male and female participants,
- to include at least two participants who are over 65 and could theoretically be looking for this information for themselves,
- to include at least 2 participants who would play the role of carers or family members of someone needing residential care

## Sessions

To be carried out individually, approximately 30 minutes duration per person. Results from the user testing sessions to be sent back to Denise Hampson by Friday 8<sup>th</sup> May, ready for a teleconference on the week beginning 11<sup>th</sup> May.

## Equipment

The test environment should include a desktop/PC, a laptop, tablet device and smart phone. The device used by the participant for each test will be the device they say they prefer to use when they go online. Check prior to the user testing session if the participant needs any additional support or accessibility tools.

## Test Scenarios

Participants will be given a series of four scenarios to complete the calculation.

## Staff

You will need a minimum of two members of staff to complete the tests, one to lead the facilitation and another person to help with recording the results and comments. You may choose to take a video or audio recording on the user testing session. If you do, you must notify the participant, explain what the footage will be used for and stop recording at any moment if the participant decides they don't want to be recorded.

## USER TESTING RESULTS

Complete the following for each participant. Read out loud any text that is in bold italics.

### User Background

Name: \_\_\_\_\_

Date / Time: \_\_\_\_\_

Age bracket: \_\_\_\_\_

Gender: \_\_\_\_\_

***“Please tell me a bit about your background e.g. your life stage, your occupation”***

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***“How often do you go online, and what do you tend to use the Internet for?”***

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***“Which devices do you mainly use to get online? For example e.g. desktop/PC, laptop, mobile, tablet?”***

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Proceed with the test using whichever is their main device of choice for going online.

### Outline of the DPA Calculator

In this section, we are framing the outline proposition of the tool, without going into too much detail.

***“If you, or a person you are enquiring for, needed to move into residential care, a Deferred Payment Agreement is a financial agreement that you could enter into with the council which could allow you to defer the cost of paying for your care against the value of your home. As part of helping people to understand what their options are for paying for care, [name of council] have created a new online calculator that explains what a deferred payment agreement is, whether or not it would be an option available to you, and how much it would cost.”***

## User Expectations

Explore the user journey they would expect to complete to arrive at the DPA calculator on your website. Start at the council home page.

***“The feedback we get from today’s test will help us to make some final improvements to the calculator before we make it available for the public to use. For this reason, today it is in a test environment, so the public can’t yet find it on our site.***

***But imagine that it was on our website now, and imagine you have just found the council home page, where would you expect to find this calculator on this website.”***

Note the steps taken.

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## The Calculations

Open the calculator on the first page and present the participant with each scenario in turn. Ask the participant to ‘think out loud’ to explain their thought process as they go.

***“I am going to give you a series of short scenarios to use to apply to the calculator. They are examples of the kind of information people will need to type into the calculator. Please can you talk out loud as you go along, so I can follow your thought process? For each scenario, please answer the following questions?” (Present the participant with a separate sheet with each scenario.)***

- Scenario 1 –Eligible and they will have enough equity to defer payment against to last them for over 3 years
- Scenario 2 - Ineligible because they have too much already in savings and assets
- Scenario 3 - Ineligible because they don’t live on their own (you may choose to prompt them to still get in touch as under some circumstances the council may still agree to one)
- Scenario 4 - Eligible but a 3 year DPA will deplete them of almost all of their equity. They are able to add £150 per week top up provided by a relative and may consider renting out their property.

## SCENARIO 1

Did the participant input the correct details into the calculator and record the correct answers? (£X total cost, £Y interest and Z months)

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Did the participant make any critical errors? (Errors that lead to an inaccurate answer)

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Did the participant make any non-critical errors? (Errors that participants recover/correct themselves)

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***“What information would you expect to find or be directed to after this calculation?”***

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## SCENARIO 2

Did the participant input the correct details into the calculator and record the correct answers? (£X total cost, £Y interest and Z months)

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Did the participant make any critical errors? (Errors that lead to an inaccurate answer)

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Did the participant make any non-critical errors? (Errors that participants recover/correct themselves)

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***“What information would you expect to find or be directed to after this calculation?”***

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### SCENARIO 3

Did the participant input the correct details into the calculator and record the correct answers? (£X total cost, £Y interest and Z months)

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Did the participant make any critical errors? (Errors that lead to an inaccurate answer)

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Did the participant make any non-critical errors? (Errors that participants recover/correct themselves)

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***“What information would you expect to find or be directed to after this calculation?”***

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### SCENARIO 4

Did the participant input the correct details into the calculator and record the correct answers? (£X total cost, £Y interest and Z months)

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Did the participant make any critical errors? (Errors that lead to an inaccurate answer)

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Did the participant make any non-critical errors? (Errors that participants recover/correct themselves)

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***“What information would you expect to find or be directed to after this calculation?”***

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## End of the Session

At the end of the session, ask participants:

***“Please rate the following on a scale of 1-5, where 1 is very poor and 5 is excellent.”***

Ease of use of the calculator: (1-5) \_\_\_\_\_

Ease of understanding the information presented in the results: (1-5) \_\_\_\_\_

***“Who do you think this tool will be the most useful for?”***

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***“What did you like about the calculator?”***

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***“What did you dislike about the calculator?”***

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***“Are there any ways you think we can improve the calculator?”***

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Thank the person for participating in the testing process. Tell them that their feedback has been valuable, will be collected, together with the feedback from other test participants and the results will be used to make final changes before the calculators are made available to the public.