

Overview

When: Jan 4-14, 2019

Where: GSA NYC and remote

Participants: 6 participants, 1 from GSA and 5 from Truss. 4 with eQip experience and 2 without.

Tested sections: Your history





Scope of testing

Your History

For the first round of testing we focused primarily on the “Your history” section. We chose this sections specifically because it utilized a majority of the more complex components of the application (dates, addresses, timelines, accordions).

We were specifically looking for feedback on the updated design system. Are applicants able to easily interact with the updated components such as (checkboxes, radio buttons, dropdowns, etc.). We were also looking for general feedback on question comprehension and form validation.

An official website of the United States government [Here's how you know](#)

SF86 Instructions Logout

Your history >

0/10
Sections complete

- Information about you ▾
- Your history** ^
 - Introduction
 - Where you have lived**
 - Employment activities
 - Where you went to school
 - Former federal service
 - Review
- Relationships ▾
- Citizenship ▾
- Military history ▾
- Foreign associations ▾
- Financial record ▾
- Substance use ▾
- Investigative and criminal history ▾
- Psychological and emotional health ▾
 - Review and submit ▾

Where you have lived

List the places where you have lived beginning with your present residence and working back 10 years.

Residences for the entire period must be accounted for without breaks.

- Indicate the actual physical location of your residence, not a Post Office box or a permanent residence when you were not physically located there.
- If you split your time between one or more residences during a time period, you must list all residences.
- Do not list residences before your 18th birthday unless to provide a minimum of 2 years residence history.

Where you have lived 0/10 Years covered

Address 1: Provide residence details Close Remove

Provide the street address ⓘ

This address is

In the U.S. APO/FPO/DPO Outside the U.S.

Street address

Apt, suite, building, floor, etc. (Optional)

City



Synthesis



Findings

Timelines progress confusion

Observation

Applicants have a hard time understanding the full connection between the timeline segments and the accordion elements. They see that chunks of the timeline are filling up but don't know which chunk relates to what entry.

Suggestion

Add a simple hover state to the timeline elements with basic information (address, dates) so that applicants know what chunk of the timeline relates to what entry.

The screenshot shows the SF86 application interface. At the top, it says "An official website of the United States government" and "Here's how you know". The main header is "SF86" with "Your history >" on the right. A progress indicator shows "0/10 Sections complete". A sidebar on the left lists sections 1 through 10, with "2 Your history" expanded to show sub-sections like "Where you have lived". The main content area is titled "Where you have lived" and includes instructions: "List the places where you have lived beginning with your present residence and working back 10 years." It also lists three bullet points: "Indicate the actual physical location of your residence", "If you split your time between one or more residences during a time period", and "Do not list residences before your 18th birthday". A progress bar shows "4/10 Years covered". Below this, there are two address entries: "Address 1: 801 Union St Apt 3, Brooklyn, NY 11215" (05/2015 - 1/2019) and "Address 2: 10 Wyman Rd, Marblehead, MA 01945" (7/1988 - 8/2009). At the bottom, there is a question "Do you have an additional residence to report?" with radio buttons for "Yes" and "No".

“Estimated” is vague

Observation

Applicants don't know what affect checking estimated will have on their form submission. What does this mean to the investigator?

Suggestion

Add more specific help text around what the impact of checking estimated does.

The diagram shows a form with two date selection sections: 'From date' and 'To date'. Each section has three input fields for 'Month', 'Day', and 'Year'. The 'From date' fields contain '05', '05', and '2015' respectively, each with a green checkmark icon. The 'To date' fields are empty. Below the 'From date' fields is a checkbox labeled 'Estimated'. Below the 'To date' fields is a faded checkbox labeled 'Estimated'. To the right of the 'To date' fields is the text 'or' followed by a green button with a blue checkmark and the text 'Present'. An arrow points from the 'From date' fields to the 'To date' fields.

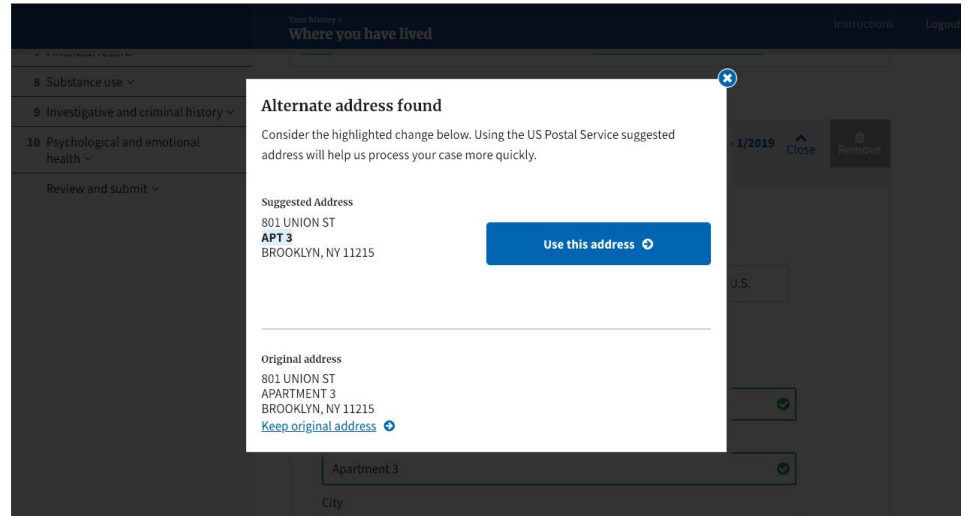
Address validation is obtrusive

Observation

Some applicants felt that the USPS validation modal was obtrusive to their flow through the form. It blocked them from being able to proceed faster to the next question. They were also jarred by when it appeared and weren't sure how it was triggered.

Suggestion

Explore doing the USPS validation inline underneath the address block.



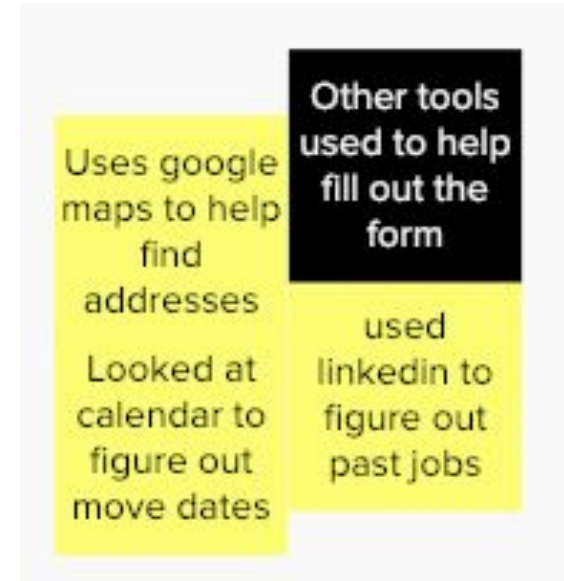
Outside docs/tools are helpful

Observation

Applicants are using a number of external documents and/or tools to aid them in filling out their applications (address/contact books, calendars, emails, google maps, social media profiles, etc.)

Suggestion

Explore including a “Helpful documents and tools for this section” area within the introduction to each form section. This will help prepare applicants for what information they need to have on hand.



Wanted to leave dates more vague

Observation

Applicants are wondering why they need to be so specific with their dates. Some left the “day” field blank and checked the estimated box, or they filled in a guess for the “day”.

Suggestion

Explore with OPM if there are other places in the app where only month/year is possible.

Provide date of last contact

Month	Day	Year
10 		2018 
<input checked="" type="checkbox"/> Estimated		

Multiple phone numbers is repetitive/confusing

Observation

Applicants are confused by the multiple phone numbers for a person who knows you well at an address. Many would use the same number repeated for all three entries.

Suggestion

Speak with OPM to see if there is a way to streamline this into a single number, or provide a simple way to copy the number across the other entries.

Their contact information

Provide the following contact information for this person.

Provide this person's evening phone number [?](#)

Switch to: [DSN number](#) [International number](#)

United States telephone number

Extension

() - # or I don't know

Day only Night only Both

Provide this person's daytime phone number [?](#)

Switch to: [DSN number](#) [International number](#)

United States telephone number

Extension

() - # or I don't know

Day only Night only Both



Solution exploration

Timeline hover states

Problem

Timelines progress confusion

Solution exploration

By providing a simple hover state to the timeline block, it may be easier for applicants to associate timeline chunks to individual entries below.

The screenshot shows the SF86 application interface. The top navigation bar includes the SF86 logo, a 'Your history >' link, and 'Instructions' and 'Logout' links. The main content area is divided into two columns. The left column is a sidebar with a progress indicator '0/10 Sections complete' and a list of sections: 1 Information about you, 2 Your history (expanded), 3 Relationships, 4 Citizenship, 5 Military history, 6 Foreign associations, 7 Financial record, 8 Substance use, 9 Investigative and criminal history, and 10 Psychological and emotional health. The 'Your history' section is further divided into 'Where you have lived' (selected), 'Employment activities', 'Where you went to school', 'Former federal service', and 'Review'. The right column is titled 'Where you have lived' and contains instructions: 'List the places where you have lived beginning with your present residence and working back 10 years.' It also includes a note: 'Residences for the entire period must be accounted for without breaks.' Below the instructions are three bullet points: 'Indicate the actual physical location of your residence...', 'If you split your time between one or more residences during a time period...', and 'Do not list residences before your 18th birthday...'. A timeline visualization shows a green bar representing the period from 4/2015 to 1/2019, with a tooltip showing 'Address 1: 801 Union Street Apt 3 Brooklyn, NY 11215' and '4/2015 - 1/2019'. A red thumbs-up icon is visible over the tooltip. Below the timeline is a 'Summary of places you have lived' table with three entries:

Address	Period	Action	Remove
Address 1: 801 Union St Apt 3, Brooklyn, NY 11215 Person: Reena Siefert	4/2015 - 1/2019	Open	Remove
Address 2: 50 Lexington Ave Apt 10c, New York, NY 100...	8/2013 - 4/2015	Open	Remove
Address 3: 431 S Union St Apt 3, Burlington, VT 05401	9/2011 - 7/2013	Open	Remove

In-line address validation

Problem

Address validation is intrusive

Solution exploration

Showing the address validation inline would reduce the intrusiveness of the process but may allow for users to ignore it.

Your history: **Where you have lived** Instructions Logout

5 Military history ▾
6 Foreign associations ▾
7 Financial record ▾
8 Substance use ▾
9 Investigative and criminal history ▾
10 Psychological and emotional health ▾
[Review and submit ▾](#)

Where you have lived 0/10
Years covered

Address 1: **801 Union St Apt 3, Brooklyn, NY 11215** Close Remove

Provide the street address ⓘ

This address is
 In the U.S. APO/FPO/DPO Outside the U.S.

[Choose a previously used address](#)

Street address
801 Union St ⓘ

Apt, suite, building, floor, etc. *(Optional)*
Apt 3 ⓘ

City
Brooklyn ⓘ

State ⓘ ZIP Code ⓘ

Alternate address found ✕

Consider the highlighted change below. Using the US Postal Service suggested address will help us process your case more quickly.

Suggested Address
801 UNION ST
APT 3
BROOKLYN, NY 11215 Use this address ⓘ

Original address
801 UNION STREET
APT 3
BROOKLYN, NY 11214
[Keep original address ⓘ](#)

Helpful docs and tools in section instructions

Problem

Outside docs/tools are helpful

Solution exploration

Providing helpful documents and tools in the introduction of each section may help applicants progress through the form faster by having the necessary information on hand.

The screenshot displays the SF86 application form interface. At the top, it indicates 'An official website of the United States government' and 'here's how you know'. The main header features the SF86 logo and the text 'Information about you'. Below this, a progress bar shows '0/10 Sections complete'. The current section is '1 Information about you', which includes an 'Introduction' section with fields for Full name, Date of birth, Place of birth, Social security number, Other names used, Your contact information, and Your Identifying information. A 'Review' button is also present. A 'Next Full name' button is visible at the bottom right. A popup window titled 'Helpful tools or documents for this section' is overlaid on the right side, listing: - Drivers license or ID card, - Social Security card, and - Birth certificate. A 'Saved 56 sec ago' notification is shown at the bottom center.

Things we are doing well!



- **Autosave** is very comforting and builds trust in the form
- **Freely moving around the form** allows applicants to see what is coming up and complete sections as they wish
- **Form progress and section progress indicators** are helpful in showing applicants how much they've accomplished
- **Branching** or showing only relevant questions cuts down a lot of cognitive overhead
- **Address validation** is very helpful when entire parts of an address are unknown or incorrect (zip codes mostly)
- **Updated visual design** makes the form feel easy and well organized

