User Testing Toolkit

Improving Court Usability and Access: A Toolkit for Inclusive and Effective User Testing

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National Center for State Courts

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If you'd like help with your own user testing project or have questions, please contact the NCSC Access to Justice Team.

To schedule a call, click this Calendly link: calendly.com/d/g3t-j4y-5zg.

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Introduction

Purpose of the Toolkit

The User Testing Toolkit is a comprehensive guide designed to assist court staff, legal aid organizations, self-help centers, and other stakeholders in effectively conducting user testing for court user resources.

Court user resources include both essential materials that individuals must use to navigate the court system and supportive tools designed to assist them. These include legal assistance tools such as self-help materials, guided interviews for self-represented litigants, court forms and documents that users must fill out and submit, and court websites providing self-help content and other vital information.

The primary goal of this toolkit is to provide practical strategies and resources that ensure court user resources are accessible, understandable, and valuable for the public. The toolkit will help you learn best practices for conducting effective tests and includes tools and templates that can streamline your efforts. Whether you are new to user testing or looking to improve your current practices, this toolkit provides the guidance and resources you need to succeed.

User testing is a critical step in developing and refining court user resources. By involving actual or potential users in the testing process, we can identify areas where users may struggle, gather feedback on improving resources, and ultimately improve the overall user experience. This toolkit aims to empower you to conduct thorough and effective user testing, leading to resources that better meet the needs of the diverse populations we serve.

Who Should Use This Toolkit

This toolkit is intended for a wide range of professionals involved in the creation, maintenance, and dissemination of court user resources, including:

- **Court Staff:** Judges, clerks, and administrative personnel who oversee and manage self-help centers, legal forms, websites, guided interviews, and other materials.
- **Legal Aid Organizations:** Attorneys, paralegals, and volunteers providing legal assistance to the public and creating self-help materials.
- **Self-Help Centers:** Staff and volunteers who assist court users with filling out forms and understanding legal procedures.
- **Community Partners:** Organizations and individuals who collaborate with courts to expand access to justice, such as social service agencies, libraries, and educational institutions.

Understanding User Testing

What is User Testing?

User testing is a process where actual or potential users of a resource or service provide feedback on its functionality, usability, and overall effectiveness. In the context of court user resources, user testing involves having users interact with forms, instructions, websites, or other resources to ensure they are accessible, straightforward, and easy to use. The primary goal of user testing is to identify any issues or barriers that users may encounter and to gather insights on how to improve the materials to better meet their needs.

User testing is crucial because it helps ensure that legal resources are designed with the end-user in mind. By involving users in the development and refinement process, we can create legally accurate and user-friendly materials, reducing frustration and confusion for those who need to navigate the legal system.

Why Conduct User Testing?

Benefits of User Testing

User testing offers numerous benefits, particularly in developing and refining court user resources. Here are some of the key advantages:

1. **Improves Usability:** User testing helps identify areas where users struggle with understanding or using a resource (Maier & Eckert, 2018b). By observing real users as they interact with materials, you can pinpoint confusing elements, unclear instructions, and other usability issues. This feedback allows you to make necessary adjustments to ensure the materials are intuitive and easy to navigate.

2. **Increases Accessibility:** It is crucial to ensure that court user materials are accessible to all users, including those with disabilities or limited English proficiency. User testing can reveal barriers that these users might face and provide insights into how to design resources that are more inclusive and accessible to everyone. Research shows that accessibility barriers, such as the lack of video captions or difficult-to-navigate websites, can lead to frustration and negative emotional responses among users with disabilities (Pascual et al., 2014).

3. **Identifies Real-World Issues:** Users bring diverse perspectives and experiences that developers may not anticipate. User testing can uncover real-world problems that users face, providing valuable insights into their needs and preferences.

4. **Increases User Satisfaction:** By involving users in the development process and addressing their feedback, you create materials that better meet their needs and expectations. This approach increases user satisfaction and fosters a sense of ownership and engagement among users as they see their input reflected in the final product (Zimmermann & Vanderheiden, 2021).

5. **Reduces Errors and Friction:** User testing can identify common mistakes or misunderstandings that users might have when filling out forms or following instructions. By addressing these issues, you can reduce errors and ensure that users complete processes correctly, saving time and resources for both users and the court system. You may also reduce questions or help users formulate better questions, saving staff time and increasing job satisfaction.

Impact on Procedural Justice and Public Trust

Conducting user testing improves the quality of court user materials. It has a broader impact on procedural justice and public trust in the legal system.

1. **Promotes Procedural Justice:** Procedural justice refers to the fairness and transparency of the processes through which legal decisions are made. When users can easily understand and navigate legal procedures, they are more likely to feel that they have been treated fairly. Human-centered design principles applied in court services have been shown to improve user experiences and perceptions of fairness by addressing negative emotions and increasing clarity and confidence (Hagan, 2018b)

2. **Builds Public Trust:** Public trust in the legal system is essential for its legitimacy and effectiveness. When users encounter well-designed, user-friendly materials, it demonstrates that the legal system is responsive to their needs and committed to providing accessible justice. This fosters confidence in the system and encourages greater engagement and compliance (Hagan, 2018a).

3. **Encourages User Engagement:** User testing involves users directly in the development process, signaling that their input is valued and significant. This participatory approach can lead to greater user engagement and a sense of ownership over the materials as users see their feedback reflected in the final product (Hagan, 2019b).

4. **Ensures Equity:** By making court user resources more accessible and easier to understand, user testing helps ensure that all individuals have an equal opportunity to access justice regardless of their background or abilities. This contributes to a more equitable legal system where everyone can navigate legal processes effectively.

5. **Informs Continuous Improvement:** Regular user testing creates a feedback loop that informs the continuous improvement of court user materials (LaGratta, 2023). As the legal landscape and user needs evolve, ongoing user testing ensures that materials remain relevant, effective, and aligned with the principles of procedural justice.

What Can You User Test?

Many different court user resources could benefit from user testing. Here are some areas where courts can implement it:

- Court Forms
- Self-Help Materials (handouts, procedure guides)
- Court Websites
- E-filing Systems
- Self-Help Kiosks or Public Access Terminals
- Court Notices and Summons
- Signage and Wayfinding Materials
- Accessibility Features Compatibility
- Feedback Collection Mechanisms

User Testing Methods

User testing can be conducted in various ways, depending on the specific goals of the testing, the resources available, and the project stage.

Common Types of User Testing

1. **Surveys**
    - **Description**: Surveys are a straightforward method to collect feedback from many users. They can be administered online, on paper, or verbally and typically consist of questions designed to gauge users' experiences and opinions.

- **Advantages**:
    - Can reach a broad audience.
    - Easy to administer and analyze.
    - It allows for anonymity, which can encourage honest feedback.
- **Disadvantages**:
    - Limited depth of feedback.
    - Responses may need more context or detailed explanations.

2. **Focus Groups**
    - **Description**: Focus groups involve gathering a small group of users to discuss and provide feedback on a resource in a structured setting. A facilitator guides the discussion, asking specific questions and encouraging participants to share their thoughts and experiences.
    - **Advantages**:
        - Provides in-depth, qualitative feedback.
        - Encourages interaction and discussion, leading to diverse perspectives.
        - Can identify common issues and themes.
    - **Disadvantages**:
        - Group dynamics or dominant participants may influence it.
        - Requires skilled facilitation.
        - Less anonymity, which may limit openness.
3. **Individual Interviews**
    - **Description**: Individual interviews involve one-on-one sessions with users, where a facilitator asks questions and observes the user's interaction with the resource. These interviews can be structured or semi-structured, allowing for flexibility in exploring specific issues.

- **Advantages**:
    - Provides detailed, personalized feedback.
    - Allows for probing questions and follow-up.
    - It can be tailored to the user's specific experience.
- **Disadvantages**:
    - It is time-consuming to conduct and analyze.
    - A limited number of participants.
    - Potential for interviewer bias.

4. **A/B Testing**
    - **Description**: A/B testing compares two variations of a webpage, app, form, or other assets to determine which performs better. This method helps validate assumptions about specific changes.
    - **Advantages**:
        - Helps determine the effectiveness of changes.
        - Provides precise, data-driven results.
    - **Disadvantages**:
        - Does not explain why one version performs better than the other.
        - Limited to comparative analysis.
5. **Session Recordings**
    - **Description**: Session recordings capture user interactions, such as clicks, taps, and mouse movements for websites or other digital resources. This method provides insights into how users navigate and interact with the product.

- **Advantages**:
  - Provides detailed insights into user behavior.
  - Helps identify usability issues that are not noticeable through other methods.
- **Disadvantages**:
  - It can generate large amounts of data for analysis.
  - It may not capture user motivations or reasons behind actions.

Choosing the Right Method

The choice of user testing method depends on various factors, including the project stage, the type of material being tested, the available resources, and the specific goals of the testing. Often, combining methods is the most effective approach, allowing you to gather broad and deep insights.

1. **Project Stage**: Early-stage projects benefit more from exploratory research and usability testing to gather initial user insights and identify potential issues. Later-stage projects can use A/B testing and session recordings to refine and optimize user interactions.
2. **Type of Material**: Interactive digital materials may require methods like A/B testing and session recordings, while paper forms or instructional materials benefit more from focus groups and individual interviews.
3. **Resources Available**: Consider the time, budget, and personnel available for conducting user testing. User testing can easily be scaled up or down depending on resource availability. Some methods, like surveys and remote usability testing, can be less resource-intensive than in-depth focus groups and individual interviews.
4. **Specific Goals**: Clearly define what you aim to achieve through user testing. For example, if the goal is to improve accessibility, ensure your methods include diverse user groups, including those with disabilities.

Making the Case for User Testing

Present clear, compelling evidence of its value to persuade decision-makers to invest in user testing. Highlight how user testing can lead to better-designed materials, increased user satisfaction, and overall organizational success.

1. **Showcase Success Stories and Case Studies**

    - **California Child Support Forms**: The National Center for State Courts conducted a project to improve California child support court forms by identifying areas of user confusion and questions on current forms. Outreach was conducted at self-help centers, community colleges, legal aid providers, and local libraries. Participants reviewed current and revised child support forms during remote testing sessions using Zoom. The results showed significant improvements in form usability and clarity, leading to better user experiences and more accurate form submissions (National Center for State Courts, 2023, p. 12)

    - **Managing Accessibility in E-Government Websites**: This case study focused on accessibility problems in content creation and publication on e-government websites. Users were asked to create simple tables using different Content Management System (CMS) solutions. The study found that integrating end-user development features significantly reduced errors and improved accessibility, making creating and managing content more accessible. This study demonstrated the importance of user-centered design in developing accessible government websites (Fogli, Colosio, & Sacco, 2009, p. 14)

    - **Students with Disabilities as Partners**: A pilot project involved students and staff with and without disabilities working together to user test an accessibility website for a university. The project led to significant improvements in website usability and accessibility, moving beyond compliance to actual usability and inclusion. The initiative highlighted the importance of involving users with disabilities in the testing process to create more effective and inclusive digital resources (Brown et al., 2020, p. 6).

    - **Forms Camp**: Forms Camp is a free program offered by the National Center for State Courts (NCSC), with support from the State Justice Institute (SJI), that provides training and technical assistance to courts to improve one or a small set of forms through a series of interactive webinars and work sessions. Topics included: Form design, plain language, accessibility, user testing, document assembly and automation, and form review and revisions. Resources from the 2022 and 2023 Forms Camps can be found in the Appendix under Existing NCSC Resources.

2. **Use Data and Metrics**

    - Quantitative data is powerful. Present metrics showing how user testing impacts key performance indicators such as user satisfaction, error rates, and task completion times. For example, the case study on managing accessibility in local e-government websites reported quantitative data on the time to complete tasks and the number of errors, demonstrating significant improvements when user-centered design techniques were applied (Fogli et al., 2009, p. 13).

    - Usability testing metrics such as successful task completion, critical errors, non-critical errors, error-free rates, and time on task can be used to show improvements.

    - Start with a pilot project to show tangible benefits quickly. Use feedback and results from the pilot to build a case for larger-scale user testing initiatives. Document and present these findings to decision-makers or funding bodies.

3. **Highlight Cost Savings**

    - User testing can significantly reduce long-term costs by identifying issues early in development (Maier & Eckert, 2018a). Addressing usability problems upfront prevents costly redesigns and ensures a smoother user experience (Fogli et al., 2009; Hagan, 2019b).

    - User testing can be scaled to fit different budgets and timelines. Explain that user testing can be simple and inexpensive. Even small-scale tests can provide valuable insights. For example, involving five people to review a service or resource can yield good information about areas for improvement (Michigan Advocacy Program, 2021).

Planning Your User Testing

Stages of User Testing

User testing typically involves three stages, each with specific activities and objectives.

Stage 1: Planning and Preparation

- Develop detailed plans, including test scripts, participant recruitment strategies, and logistical arrangements. Preparations should also include logistical planning, such as booking a conference room and determining technological needs.
- In addition to formal methods like focus groups, consider incorporating informal feedback methods. For example, observe users in a self-help center or ask them for immediate feedback after using a service. These methods can capture real-time insights and identify usability issues (National Center for State Courts, 2023, p. 12)

Stage 2: Conducting the Tests

- Execute the tests according to the plan, ensuring all participants understand their tasks and feel comfortable providing honest feedback.
- Collect both qualitative and quantitative data during the testing sessions.

Stage 3: Analysis and Reporting

- Analyze the data collected to identify common issues, usability barriers, and areas for improvement.
- Prepare a detailed report summarizing the findings and recommendations for further action.

Developing a User Testing Plan

Developing a comprehensive user testing plan ensures the effectiveness and efficiency of your user testing efforts. This plan should outline the testing process's objectives, methodologies, and timelines. Here are the steps to create a thorough user testing plan:

Define Objectives and Scope

Start by clearly stating what you aim to achieve through user testing. Setting specific, measurable goals will help focus your efforts and provide clear criteria for success.

Example Objectives:

- **Improve Usability:** Ensure that users can complete forms correctly and efficiently.

- **Identify Accessibility Barriers:** Ensure that court user resources are accessible to users with disabilities.

- **Gather User Feedback:** Collect qualitative data to inform future improvements.

- **Reduce Error Rates:** After identifying high error rates on a given form, try to identify why those errors occur and how to stop them.

The Appendix of this toolkit contains a User Testing Project Checklist and User Testing Plan Template designed to help guide you through the planning process.

Ethical Considerations

Recognize and Mitigate Biases

- Addressing biases and implementing privacy measures are critical for ensuring that user testing is ethical and trustworthy. These measures help to safeguard participant rights and maintain the integrity of the testing process.

- Be aware of various biases that can affect user testing, such as the Hawthorne effect, where participants alter their behavior because they know they are being observed (McCambridge et al., 2014), or social desirability bias, where participants try to provide responses they think the facilitator wants (Bergen & Labonté, 2020).

- This includes preparatory work around unconscious biases, especially when working with vulnerable populations such as migrants or economically disadvantaged individuals (Hagan, 2017). When working with these groups, it is essential to partner with community groups that understand the unique challenges these populations face and already have existing relationships with your target community. This collaboration helps identify potential risks, craft questions sensitive to participants' experiences, and ensure that the testing environment is safe and respectful (Hagan, 2017).

Protecting Tester Privacy and Confidentiality

- **Data Anonymization**: Ensure that any data collected during user testing is anonymized to protect the participants' identities. This includes removing or obscuring any personally identifiable information from the data set. For example, unique participant codes instead of names should be used when recording data (Maier & Eckert, 2018b).

- **Secure Data Storage**: Implement secure data handling practices, including using encrypted storage for digital data and locked storage for physical documents. Ensure that access to the data is restricted to authorized personnel only to protect participant confidentiality (O'Neil, 2019).

- **Obtaining Consent**: Before beginning the user testing, obtain informed consent from all participants. Clearly explain in a provided consent form the purpose of the testing, how the data will be used, and the measures taken to protect their privacy (Hagan, 2017; Rosas Villena et al., 2014).

By addressing biases in user testing and implementing privacy and confidentiality measures, the user testing process is ethical and trustworthy. This approach protects participants and increases the credibility and reliability of your findings.

The Appendix of this toolkit contains an Informed Consent Form Template as a starting point for use in user testing sessions.

Identify Stakeholders and Resources

Each stakeholder plays a specific role in ensuring the success of the testing process, while proper resource allocation ensures that the process runs smoothly and efficiently.

Example Stakeholders

1. **Project Managers**

    - **Role**: Oversee the testing process, coordinate between different teams, and meet testing goals.

    - **Responsibilities**: Scheduling, resource management, progress tracking, and reporting to higher management.

2. **Designers and Developers**
    - **Role**: Implement changes based on user feedback to improve the usability and accessibility of court user resources.
    - **Responsibilities**: Making design adjustments, coding updates, and ensuring the user interface is intuitive and user-friendly.
3. **End-Users (or Court Resource Users)**
    - **Role**: Provide firsthand feedback on the materials being tested, highlighting usability issues and areas for improvement.
    - **Responsibilities**: Participating in testing sessions, completing tasks, and providing detailed feedback.
4. **Legal Aid Staff**
    - **Role**: Offer insights into clients' everyday issues and suggest practical improvements based on their experiences.
    - **Responsibilities**: Participating in focus groups, reviewing materials for legal accuracy, and suggesting user-friendly adjustments.
5. **Court Administrators**
    - **Role**: Ensure that the materials comply with court regulations and procedures and provide administrative support for testing.
    - **Responsibilities**: Reviewing materials for procedural accuracy, coordinating with court staff, facilitating access to resources, ensuring implementation of suggested improvements to forms, websites, legal information, etc.
6. **IT Support Staff**
    - **Role**: Provide technical support during testing and ensure all digital tools and platforms function correctly.
    - **Responsibilities**: Setting up and maintaining testing environments, troubleshooting technical issues, and ensuring data security.
7. **Community Partners**
    - **Role**: Collaborate with the court to ensure testing includes diverse participants, reflecting the broader community.
    - **Responsibilities**: Recruiting participants from various demographics, providing translation and interpretation services, and offering logistical support.

The Appendix of this toolkit contains Community Engagement Guidelines designed to help staff identify stakeholders to include in the user testing process.

Resource Allocation

Allocating resources effectively ensures that the user testing process is thorough and efficient. Proper resource management includes budgeting, time allocation, and tool selection.

1. Budget

- **Details**: Estimate costs for participant incentives, tools, and any necessary software. Budgeting should also account for potential unexpected expenses.
- **Example**: Allocate funds for gift cards as incentives for participants, purchase survey software licenses, and rent space for in-person testing sessions.

The Appendix of this toolkit contains Participant Incentive Guidelines with best practices for providing incentives in user testing.

2. Time

- **Details**: Plan for multiple rounds of testing and analysis, allowing adequate time for recruiting participants, conducting tests, and analyzing data.
- **Example**: Schedule initial testing sessions over two weeks, followed by a week for data analysis and a week for implementing changes, ensuring enough time for follow-up tests.

3. Tools

1. **Details**: Identify and procure necessary tools for conducting and analyzing tests, such as survey platforms, recording equipment, and analysis software.
2. **Example**: See Technology Available for User Testing

Additional Considerations:

- **Training**: Ensure all facilitators and observers are trained in user testing methods and ethical considerations.
- **Logistics**: Arrange for comfortable testing environments, in-person or remote, and provide necessary equipment such as computers, cameras, and microphones.
- **Documentation**: Keep detailed records of all testing sessions, including participant feedback, observations, and follow-up actions.

Identifying What to Test

The next step is to identify the key elements that need to be tested. Focus on areas that directly impact user experience and functionality.

Prioritize Test Elements

- **Form Usability:** Evaluate how easily users can complete forms. Consider testing aspects such as the clarity of questions, ease of navigation, and error prevention.
    - **Example:** Test an answer form to see if users can fill it out without assistance.
- **Clarity of Instructions:** Assess whether the instructions are clear and easy to follow.
    - **Example:** Test the instructions for filing a small claims case to ensure they are understandable.
- **Accessibility Features:** Ensure that your materials are accessible to users with disabilities.
    - **Example:** Test the accessibility of an online guided interview using screen readers and other assistive technologies.

Create Test Scenarios

Develop realistic scenarios that users might encounter while using the materials. These scenarios should reflect everyday tasks and challenges users face. Make sure these scenarios cover a broad range of user interactions to capture diverse feedback. Using personas and scenarios representing diverse user needs can guide the design process, ensuring accessibility is a foundational element (Zimmermann & Vanderheiden, 2021).

Example Scenarios:

- **Filling Out Forms:** Test how users complete various legal forms, identifying points of confusion or error.
- **Navigating Websites:** Evaluate users' ability to find information on a legal aid website, including the ease of use and navigation.
- **Understanding Instructional Materials:** Assess how well users comprehend and follow step-by-step guides or manuals.
- **Using Accessibility Tools:** Test the effectiveness of screen readers, magnification tools, and other assistive technologies.
- **Interacting with Customer Support:** Simulate interactions with customer support to gauge the clarity and helpfulness of responses.
- **Performing Common Tasks:** Create scenarios where users must perform common legal tasks, such as filing a complaint or drafting a legal document.

Sample test scenarios can be found in the Appendix of this toolkit under Existing NCSC Resources

Selecting Testers

Choosing the right participants is critical to obtaining relevant and actionable feedback. A common mistake people make at this stage is only relying on feedback from court staff, attorneys, or partners. Those can be valuable sources of information, but to get the best sense of how the end user feels about a given product, ask them! Try your grandparents, middle school students, neighbors, barbers, friends from the dog park, etc.

The Appendix of this toolkit has Sample Recruitment Email Templates for initial contact, reminder email, and a follow up/thank you email.

Define Participant Criteria

Identify the characteristics of your target users, including demographics, skill levels, and specific needs. Defining participant criteria ensures that the selected testers accurately represent the user base.

Diversity and Inclusion in User Testing

Ensure that your participant pool includes diverse users to capture a wide range of perspectives and experiences. Consider including users with disabilities, limited English proficiency, and varying levels of familiarity with the legal system. Below are strategies and best practices for including diverse testers and accommodating their needs.

Strategies for Including Diverse Testers

- **Collaborate with Community Organizations**: Engage with community organizations and advocacy groups that serve underrepresented populations to ensure your participant pool reflects the broader community. Partnering with these groups not only aids in recruitment but also helps tailor your testing protocols to be culturally sensitive and relevant to participants' experiences (Hagan, 2017). Collaborating with these groups can also facilitate reaching non-English speakers and individuals with disabilities, ensuring that your feedback captures a wide range of user needs (Brown et al., 2020).

- **Simplify Content**: Design user interfaces with clear and straightforward language, intuitive navigation, and visual aids for people with cognitive impairments (Moreno et al., 2024; Capra et al., 2012). To enhance accessibility for users with varying literacy levels, consider incorporating multimedia elements such as audio guides, visual aids, and video instructions in your forms and questionnaires. These interactive features can make the content more understandable and user-friendly, particularly for individuals who struggle with traditional text-based formats (Cremers et al., 2017)

- **Offer Accommodations**: Provide necessary accommodations, such as sign language interpreters, screen readers, or translated materials, to ensure that all participants can fully engage in the testing process (Šumak et al., 2023). Additionally, it is important to consider the accessibility of the testing environment itself, such as ensuring physical spaces are wheelchair accessible or that virtual platforms are compatible with assistive technologies. Some users may prefer paper-based materials while others may need information in alternative formats like videos. Tailoring your testing approach to these needs will lead to more inclusive and effective user testing (National Center for State Courts, 2023).

- **Simplify Numerical Information**: Present numerical data in a straightforward and understandable manner to make it more accessible to users with cognitive disabilities. For example, use simple charts or diagrams rather than complex tables to present statistical information (Bautista et al., 2017).

- **Apply Universal Design Principles**: Develop forms and websites that can be easily navigated by users with various disabilities, using universal design principles such as providing multiple ways to interact with content. This includes designing interfaces that can be navigated using various input methods, such as voice commands or keyboard-only navigation, and ensuring that content is available in multiple formats, such as text, audio, and video. Universal design helps create inclusive environments that are usable by everyone, without the need for adaptation or specialized design (Fogli et al., 2009).

These strategies are important, but they are most impactful when paired with long-term planning and sustained relationships with diverse communities. Regular communication and consistent application of these principles beyond user testing are essential for meaningful engagement. Without this, you risk tokenizing or excluding the very groups you aim to include. Building trust through partnerships with community organizations is key. Additionally, offering incentives to participants shows you value their time and input.

Developing Scripts and Instructions for Facilitators

Develop clear, concise scripts for facilitators to ensure consistency across sessions. These scripts should outline the testing process, including the introduction, instructions, and questions to ask participants. A well-structured script helps facilitators remain neutral and gather unbiased feedback (Maier & Eckert, 2018b).

Example Script Sections:

- **Introduction:** Provide a brief overview of the testing session, explaining its purpose and reassuring participants that there are no right or wrong answers.
    - **Example:** "Thank you for participating in our user testing session. We are here to understand how you interact with our court self-help website and gather your feedback on how we can improve it. Please be honest—there are no right or wrong answers, and you won't hurt our feelings."
- **Instructions:** Clearly outline what participants need to do during the session.
    - **Example:** "Please navigate through the website and try to find the form for a small claims case. Once you find it, try to complete it as if you were filing a claim."

The Appendix has sample scripts available under Existing NCSC Resources as well as a User Testing Facilitator Handbook to help train staff involved in the user testing process.

Crafting Effective Questions

Crafting effective questions is essential for gathering meaningful feedback during user testing. Different questions can provide insights into user experience, usability, and accessibility.

Types of Questions

- **Open-ended Questions:** allow participants to provide detailed feedback in their own words, which is useful for gaining insights into user thoughts and experiences.
  - **Example:** "What did you find confusing about this form?"
- **Ranking Questions:** These ask users to rank items in order of preference or importance, which helps understand user priorities.
  - **Example:** "Rank the following features from most to least useful."
- **Demographic Questions:** These collect background information about the participants, which can be helpful in segmenting feedback by user characteristics.
  - **Example:** "What is your primary language?"

Example Questions for Different Contexts

- **For Self-Help Forms:** "Was the language used in the form clear and easy to understand?"
- **For Online Resources:** "How easy was it to find the information you were looking for on the website?"
- **For Instructional Materials:** "Did the instructions provided help you complete your task successfully?"

The Appendix has sample questions available under Existing NCSC Resources, as well as a Participant Demographic Information Form Template to streamline the collection of demographic information.

Conducting User Testing

The Appendix contains a Pre-Session Checklist, During-Session Checklist, and a Post-Session Checklist to help guide facilitators through the user testing process.

Create a Welcoming and Informative Environment for Testers

Ensuring the testing environment is comfortable and non-threatening is essential for eliciting honest and useful feedback. Here is a list of strategies to achieve this:

1. **Physical Setup**: Arrange the testing area to be welcoming and free from distractions. Consider the seating arrangements, lighting, and noise levels. Ensure the environment is accessible to all participants, including those with disabilities.
    - **Example**: Set up a quiet room with comfortable seating and adequate lighting. Make sure the space is wheelchair accessible and equipped with assistive technologies such as screen readers or magnification tools.
2. **Provide Clear Information**: Clearly explain the purpose of the testing, emphasizing that there are no right or wrong answers. This helps reduce anxiety and encourages honest feedback.
    - **Example**: Before starting the session, give participants an overview of what to expect and reassure them that their feedback is valuable regardless of their experience with the materials.
3. **Refreshments and Breaks**: Offering refreshments and scheduled breaks can help maintain participant comfort and focus during longer sessions.
    - **Example**: Provide water, coffee, and light snacks. Schedule a short break every hour to keep participants refreshed and attentive.
4. **Ethical Considerations**: Ensure that participants' privacy and confidentiality are respected. Obtain informed consent and explain how their data will be used.
    - **Example**: Use a consent form that details the purpose of the study, how the data will be used, and assures participants of their anonymity.

Facilitating the Session

Effective facilitation is crucial for obtaining good feedback. Here are some tips for facilitators:

1. **Maintain Neutrality**: Avoid leading questions and stay neutral in your reactions to participants' feedback. This helps ensure that the feedback is unbiased and honest.
   - **Example**: Instead of asking, "Did you find this form easy to use?" ask, "Can you describe your experience using this form?"
2. **Encourage Open Feedback**: Create an environment where participants feel comfortable sharing their thoughts. Encourage them to speak aloud about their experience and any difficulties they encounter.
   - **Example**: Use phrases like, "Please tell us everything you're thinking as you complete this task," to encourage verbalization of their thought process.
3. **Active Listening**: Practice active listening skills, such as nodding, paraphrasing, and summarizing, to show understanding and encourage further elaboration from participants.
   - **Example**: After a participant describes an issue, summarize their feedback by saying, "So, you found the instructions unclear when you reached this section. Is that correct?"
4. **Record and Document Sessions**: Ensure that all user testing sessions are recorded and documented thoroughly. This can include video or audio recordings, screen captures, and detailed notes taken by facilitators or observers.
   - **Example**: Use tools like Hotjar or Lookback, discussed in the next section, to record sessions and annotate key moments. Detailed documentation helps identify recurring issues and patterns that may not be apparent during the live session.

Technology Available for User Testing

Leveraging technology can enhance the efficiency and effectiveness of user testing. While NCSC does not endorse any one product over another, the list below can be useful in understanding options and pricing (prices current as of June 2024):

1. **Optimal Workshop** (https://www.optimalworkshop.com/)

Plan	Monthly Price (USD)	Annual Price (USD)	Features
Pro	$249	$208/month ($2496/year)	- Unlimited studies - Unlimited tree testing tasks - Unlimited card sorting cards - Unlimited participant responses - Branded studies - Post task questions - Unlimited storage
Team	$249/user	$191/user/month ($2292/user/year)	- Everything in Pro plus: - Priority support - Collaborate on studies - Team usage reporting - Custom Participant Agreement

2. **Hotjar** (https://www.hotjar.com/)

Plan	Monthly Price (USD)	Annual Price (USD)	Features
Basic	$0	$0	- Unlimited heatmaps - Recordings of user sessions - Basic filters - HubSpot integration - Dashboards - Highlights
Plus	$39	$32/month ($384/year)	- Everything in Basic, and: - Page view filters - Session information and technology filters - Events API: track custom user actions
Business	$99	$80/month ($960/year)	- Everything in Plus, and: - Behavior and experiment filters - Frustration and engagement scores - Identify API: track custom user attributes - All custom-built integrations
Scale	$213	$171/month ($2052/year)	- Everything in Business, and: - Funnels and Trends - Console tracking (Errors) - Entered text and error filters - Hotjar API: automate user lookup and deletion - Webhooks - SAML single sign-on (SSO) - Dedicated customer success manager - Priority support

3. **Dovetail** (https://dovetailapp.com/)

Plan	Monthly Price (USD)	Annual Price (USD)	Features
Free	$0	$0	- Magic features - Automatic summarization - Highlights key moments - Identifies themes - Sync with Zoom, Meet, Slack, Notion, Jira, Confluence, Zapier, and more - Read/write API access to integrate Dovetail with your custom tools - 1 project - 1 channel (Beta) - Unlimited users
Professional	$39 (billed monthly)	$29/user/month (billed yearly)	- Everything in Free, plus: - Global smart search - Summarize search results - Removes ums and ahs - Search by meaning across all data and insights - Organize projects into folders for different teams - Save projects and folders, and get back to recently viewed - Visualize highlights with four different chart types and segment by fields - Unlimited projects - Unlimited channels (Beta) - Unlimited viewers

4. **Lookback** (https://lookback.io/)

Plan	Sessions	Monthly Price (USD)	Annual Price (USD)	Features
Freelance	10 Sessions/year, 20 Sessions/year, 40 Sessions/year	$25, $50, $99	$300, $600, $1,188	Core Features: Create shareable highlights, Timestamped notes, Export notes, Playback speed & shortcuts, Chat with observing guests, Export video files, Instant highlight reels, 24/7 help center access, chat-based support, and unlimited storage.
Team	100 Sessions/year, 150 Sessions/year	$149, $224	$1,788, $2,688	Core Features, plus: Collaborate in session, @mention teammates, invite stakeholders, Private projects, and Manage team access.
Insights Hub	300 Sessions/year, 500 Sessions/year	$344, $573	$4,128, $6,876	Core Features, plus: Collaborate in session, @mention teammates, invite stakeholders, Private projects, and Manage team access.

The Appendix contains a Best Practices for Remote User Testing guide.

Feedback Collection and Analysis

Methods for Collecting Responses

1. **Written Responses:** Participants write their feedback on paper or digital forms. This method helps collect detailed, thoughtful responses.

2. **Verbal Responses:** Collecting verbal feedback during interviews or focus groups allows for real-time clarification and follow-up questions.

3. **Digital Responses:** Online surveys and feedback forms can reach a broader audience and facilitate easy data collection and analysis.

The Appendix contains a comprehensive Observation Data Collection Form Template that can be customized for your specific needs.

Techniques for Analyzing Feedback

- **Quantitative Analysis:** Use statistical methods to analyze numerical data from surveys, such as calculating averages, frequencies, and correlations.

- **Qualitative Analysis:** Identify themes and patterns in open-ended responses through coding and thematic analysis.

Methods for Analyzing Qualitative Data

- **Thematic analys**is involves identifying recurring themes or patterns in the data through coding and categorization. It helps organize the data and makes it easier to interpret.

- **Coding and Categorization**: Assign codes to segments of data that represent specific themes or topics. This method helps identify trends and organize feedback systematically. For example, during an analysis of user interviews, use a coding framework to tag recurring issues such as "navigation difficulties" or "clarity of instructions."

- **Content Analysis**: Quantify the presence of certain words, phrases, or concepts within the data. This method helps identify the frequency and importance of specific issues.

Tools for Visualizing Data

- **Charts and Graphs:** Use bar charts, pie charts, and line graphs to represent quantitative data. These visuals help illustrate trends, comparisons, and distributions clearly.

- **Heat Maps:** Heat maps show where users click or focus on a webpage, helping to understand user behavior and identify improvement areas. For example, use a heat map tool like Hotjar (see above) to analyze which parts of a court's self-help website receive the most interaction.

- **Word Clouds:** Create word clouds to represent the frequency of words in qualitative data visually. Larger words indicate higher frequency, making it easy to identify common themes.

- **Interactive Dashboards:** Develop interactive dashboards that allow stakeholders to explore the data. Tools like Tableau or Power BI can create dynamic and interactive visualizations. These tools enable stakeholders to filter and analyze user feedback by various criteria such as date, user demographics, and type of issue.

By utilizing these data analysis techniques and visualization tools, you can communicate the insights gained from user testing. This will help stakeholders understand the findings and make informed decisions to improve the usability and accessibility of your court user materials.

Incorporating User Feedback

Incorporating user feedback into your materials or services is crucial for continuous improvement and user satisfaction. An iterative design process that integrates feedback at multiple stages ensures that your final product is effective, user-centered, and responsive to evolving needs (Michigan Advocacy Program, 2021). Here are the steps to integrate feedback:

1. **Prioritize Changes:**
    - Prioritization should be based on the severity of issues, the number of users affected, and the impact on usability and accessibility. Addressing major accessibility barriers is a top priority.

2. **Implement Changes:**

    - Create a structured plan with clear steps and assigned responsibilities. Define tasks and set deadlines to ensure effective implementation.

3. **Communicate Updates:**

    - Keep all stakeholders, including users, informed about the changes made based on their feedback. This transparency builds trust and demonstrates the value of their input. Use newsletters, emails, or meetings to update stakeholders on the progress and outcomes. Consider using version numbers and/or dates to help track updates and inform users that they are using the current version.

4. **Re-test and Refine**

    - After implementing changes, re-test the updated materials with users to gather further feedback. This testing, feedback, and refinement cycle should continue until the materials meet the desired usability and accessibility standards (National Center for State Courts, 2023).

Long-Term User Testing Strategies

Integrating Feedback into Strategic Planning

Incorporating user feedback into strategic planning feedback allows courts and organizations to ensure that their resources remain effective and user-friendly over the long term (LaGratta, 2023). Here are some detailed strategies:

1. **Regular Review of Feedback**

    - Set up a regular schedule for reviewing user feedback collected from various sources, such as surveys, user testing sessions, and direct user interactions. This routine helps identify recurring issues and trends that need to be addressed.

2. **Incorporation into Strategic Planning**

    - Include user feedback as a critical component of your strategic planning process. Use it to guide decisions on resource allocation, development priorities, and long-term goals. Regularly updated user insights can drive more informed and user-centered strategic decisions (Michigan Advocacy Program, 2021).

3. **Establishing Channels for Feedback**

    - Establish various channels and feedback loops for users to provide feedback, such as online forms, focus groups, and community forums. Work with community organizations and user advocacy groups to reach diverse user populations (Hagan, 2019b). Utilizing existing relationships and partnerships for outreach can be highly effective.

Conclusion

User testing is an essential component in developing and refining court user resources. By incorporating real user feedback, we can ensure these materials are accessible, understandable, and valuable for all users. This toolkit provides the necessary strategies and resources to conduct effective user testing, thereby improving the quality and usability of legal resources. User testing helps identify areas where users may struggle, gather feedback on improving resources, and ultimately enhance the overall user experience. The continuous integration of user feedback into strategic planning ensures that materials remain relevant and effective over time.

By committing to these practices, we can create court user resources that are not only effective and accessible but also continuously improved based on honest user feedback. This commitment to user-centered design will help build a more inclusive and user-friendly legal system.

If you'd like help or have questions, please contact the NCSC Access to Justice Team. We're happy to help you think this through and are also available to assist in user testing. To schedule a call, click this Calendly link: https://calendly.com/d/g3t-j4y-5zg.

Appendix: User Testing Toolkit Templates and Resources

The included templates and tools are meant to be helpful starting places in the design and execution of user testing, but there are many ways to go about this process. Depending on your specific needs, you may need or want to modify any of the content below.

Table of Contents

Existing NCSC Resources

Clear Communication Checklist: https://perma.cc/SN7Q-4XX4

Clear Communication Resources: https://perma.cc/7PW2-G2WT

NCSC's ODR Stakeholder Engagement and User Testing advice:
https://www.ncsc.org/odr/home/stakeholder-engagement [Perma]

Usability Testing Checklist: https://perma.cc/8BVU-8HB6

Resource for Testing Facilitator Phrases: https://perma.cc/P4PV-T6S9

Sample User Testing Script: https://perma.cc/2R4N-KG6X

Process Simplification Toolkit: https://perma.cc/3SR9-FTBV

Forms Camp 2022 Materials:

User Testing Session: https://vimeo.com/738650155

User Testing Session Presentation: https://perma.cc/RM36-CQSQ

Other Forms Camp 2022 Webinars and Materials:
https://www.ncsc.org/consulting-and-research/areas-of-expertise/access-to-justice/forms-camp/forms-camp

Winter Forms Camp 2023 Materials:

User Testing Questions - Contains the following types of sample questions:

- Background and Demographic Questions
- Questions with Ranking
- Open Ended Question

Script: User Testing Instructions

Recruitment Email

User Testing Scenarios - Contains the following types of sample scenarios:

- Debt Collection - Credit Card – Defendant
- Debt Collection - Post Judgment – Defendant
- Landlord and Tenant - Eviction – Tenant
- Landlord and Tenant - Eviction – Landlord

User Testing Project Checklist

1. Understanding User Testing

- ☐ **Identify What to Test**: Determine the specific resource (e.g., form, website) that requires user testing.
- ☐ **Set Clear Goals**: Define what you aim to achieve (e.g., improve usability, enhance accessibility).

2. Planning Your User Testing

- ☐ **Define Objectives and Scope**
  - ☐ Clearly outline the goals of the testing project.
  - ☐ Specify the scope (e.g., target user groups, resource types).
- ☐ **Identify Stakeholders and Resources**
  - ☐ Engage with key stakeholders (project managers, designers, legal aid staff).
  - ☐ Determine resources needed (budget, time, tools).
- ☐ **Develop a User Testing Plan**
  - ☐ Select appropriate user testing methods (e.g., surveys, focus groups).
  - ☐ Plan participant recruitment strategies.
  - ☐ Arrange logistics (e.g., testing environment, technology setup).

3. Conducting User Testing

- ☐ **Prepare the Testing Environment**
  - ☐ Ensure the space is accessible and comfortable for all participants.
  - ☐ Obtain informed consent from participants.
- ☐ **Select and Recruit Testers**
  - ☐ Define participant criteria (diverse demographics, skill levels).
  - ☐ Recruit a representative group, including users with disabilities or limited English proficiency.

- **Facilitate the Testing Session**
    - Develop and follow a clear script for consistency.
    - Encourage open, honest feedback through neutral questioning.
    - Record sessions for later analysis.

4. Analyzing and Reporting

- **Collect and Organize Feedback**
    - Use methods like surveys, interviews, or digital tools to gather feedback.
    - Document responses and observations during testing sessions.
- **Analyze Data**
    - Apply qualitative methods (e.g., thematic analysis) to identify patterns.
    - Use quantitative methods to evaluate user performance (e.g., task completion rates).

5. Incorporating User Feedback

- **Prioritize Issues**
    - Rank feedback by severity, number of users affected, and impact.
- **Implement Changes**
    - Develop a structured plan for implementing changes.
    - Assign responsibilities and set deadlines.
- **Communicate Updates**
    - Inform stakeholders and users of changes made.
    - Use newsletters, emails, or meetings for updates.

User Testing Plan Template

---

1. Project Overview

- **Project Manager and Team**:
- **Start Date**:
- **Expected Completion Date**:

---

2. Project Goals and Objectives

Primary Goal:

- ☐ Improve usability of court forms and documents
- ☐ Test accessibility for users with disabilities or limited English proficiency
- ☐ Enhance user comprehension of self-help materials
- ☐ Optimize navigation and usability of court websites
- ☐ Evaluate user experience with e-filing systems
- ☐ Other: _______________

Secondary Goals:

- ☐ Reduce errors in form completion and submission
- ☐ Increase task completion rates for online services
- ☐ Improve overall user satisfaction with court resources
- ☐ Ensure compliance with accessibility standards
- ☐ Enhance clarity of court notices and summons
- ☐ Other: _______________

3. Project Scope

In Scope:

- Testing user interaction with specific court forms (e.g., divorce filings, small claims)
- Evaluating the clarity and usability of self-help materials (handouts, guides)
- Assessing accessibility features of court websites and online services
- Testing the user experience with self-help kiosks or public access terminals
- Reviewing the usability of signage and wayfinding materials within the court premises
- Testing the effectiveness of feedback collection mechanisms
- Other: _______________

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4. Key Stakeholders

Internal Stakeholders:

- Court Administrators
- IT Department
- Legal Aid Staff
- Judges and Judicial Officers
- Clerks of Court
- Public Information Officers
- Training and Development Staff
- Other: _______________

External Stakeholders:

- ☐ Self-represented Litigants
- ☐ Local Legal Advocacy Groups
- ☐ Community Partners (e.g., community centers, libraries)
- ☐ Disability Rights Organizations
- ☐ Language Access Services Providers
- ☐ Bar Associations
- ☐ Public Defenders and Legal Aid Attorneys
- ☐ Users of Court Websites and Online Services
- ☐ Other: _______________

---

5. Resources and Budget

Human Resources:

- ☐ 1 Project Manager to oversee the user testing process and ensure alignment with court goals
- ☐ 1-2 Facilitators to conduct the user testing sessions and guide participants
- ☐ 1 Data Analyst to compile and analyze feedback, identifying key insights
- ☐ 1 IT Support Staff to manage technical setup and troubleshoot during sessions
- ☐ 1 Recruitment Coordinator to manage participant outreach and scheduling
- ☐ Additional Volunteers or Interns to assist with logistics, note-taking, and participant support
- ☐ Other: _______________

Budget:

- **Minimal Budget**
  - Use free or low-cost usability tools (e.g., Google Forms for surveys, Zoom for remote testing).
  - Leverage existing court resources and staff for facilitation and data collection.
  - Offer minimal or non-monetary incentives (e.g., small gift cards or thank-you letters).
  - Minimal budget for printed materials, using digital alternatives where possible.
- **Modest Budget**
  - Purchase one or two paid usability tools or software licenses (e.g., basic versions of UserTesting or Lookback).
  - Invest in basic accessibility testing tools (e.g., WAVE or Axe).
  - Utilize internal staff, with some budget allocated for additional support if needed (e.g., part-time assistant or intern).
  - Offer modest participant incentives (e.g., $20-$50 gift cards or stipends).
  - Budget for essential printed materials (e.g., consent forms, testing scripts) and digital tools.
- **Expanded Budget**
  - Invest in multiple usability and accessibility tools, including more advanced versions or additional licenses (e.g., comprehensive user testing platforms like Lookback or Morae).
  - Budget for external consultants or part-time staff to assist with specialized tasks (e.g., data analysis, participant recruitment).
  - Provide moderate participant incentives
  - Budget for both printed and digital materials
  - Purchase higher-quality recording and transcription equipment, and include a budget for accessibility accommodations (e.g., screen readers, Braille materials)

Tools and Equipment:

- ☐ Physical Testing Environment Setup (e.g., computers, audio equipment, furniture, private space, signage) if conducting in-person testing
- ☐ Printed Materials (e.g., consent forms, scripts, surveys, checklists) for in-person sessions
- ☐ Video Conferencing Software (e.g., Zoom, Microsoft Teams) for remote user testing
- ☐ Survey and Feedback Collection Tools (e.g., Google Forms, SurveyMonkey) for post-session surveys
- ☐ Assistive Technologies (e.g., screen readers, Braille displays) to accommodate participants with disabilities

---

6. Participant Recruitment

Participant Criteria:

- ☐ Self-represented litigants
- ☐ First-time users of court services
- ☐ Participants with disabilities
- ☐ Users with limited English proficiency
- ☐ Experienced court users for comparison
- ☐ Other: _______________

Recruitment Method:

- ☐ Connect with court staff friends, relatives, and acquaintances
- ☐ Partner with local legal aid groups and community organizations
- ☐ Announce through court communication channels (e.g., website, newsletters)
- ☐ Use social media and public announcements to reach a wider audience
- ☐ Provide incentives such as gift cards, parking validation, or other relevant rewards
- ☐ Other: _______________

7. Testing Methodology

- **Testing Methods:**
  - ☐ Usability Testing with Screen Recording
  - ☐ A/B Testing to compare different designs or interfaces
  - ☐ Surveys and Feedback Forms for participant reflections post-session
  - ☐ Task-based testing to evaluate how well participants can complete specific tasks
  - ☐ Qualitative Interviews for in-depth insights into user experiences
  - ☐ Other: _______________
- **Environment and Logistics:**
  - ☐ Physical location setup (e.g., courtroom, conference room)
  - ☐ Remote testing setup (e.g., ensuring all participants have access to necessary technology)
  - ☐ Session schedule (dates, times)
  - ☐ Backup plans for technical issues
  - ☐ Other: _______________

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8. Ethical Considerations

- **Informed Consent:**
  - ☐ Clearly explain the purpose of the testing and how the data will be used
  - ☐ Provide participants with a consent form and ensure they understand their rights
  - ☐ Offer options for participants to withdraw at any time
  - ☐ Other: _______________

- **Confidentiality:**
  - ☐ Ensure that all participant data is anonymized
  - ☐ Securely store data and limit access to authorized personnel only
  - ☐ Other: _______________
- **Fair and Inclusive Treatment:**
  - ☐ Ensure diversity in participant recruitment
  - ☐ Provide necessary accommodations for participants with disabilities
  - ☐ Reflect on potential biases in the testing process and address them
  - ☐ Other: _______________

---

9. Session Logistics

- **Session Schedule:**
  - ☐ Set specific dates and times for each user testing session
  - ☐ Allow for different time slots to accommodate participant availability
  - ☐ Other: _______________

---

10. Data Collection and Analysis

- **Data Collection:**
  - ☐ Screen recordings of participant interactions
  - ☐ Survey results
  - ☐ Observation notes
  - ☐ Other: _______________

- **Data Analysis:**
  - ☐ Quantitative analysis (e.g., task completion rates, error rates)
  - ☐ Qualitative analysis (e.g., themes from participant feedback)
  - ☐ Comparative analysis (if A/B testing was used)
  - ☐ Other: _______________

---

11. Review and Reporting

- **Review Process:**
  - ☐ Set up sessions to review findings with key stakeholders
  - ☐ Use data to identify common issues and areas for improvement
  - ☐ Other: _______________

- **Feedback Implementation:**
  - ☐ Prioritize changes based on the severity of issues and participant feedback
  - ☐ Plan for additional testing phases to assess the impact of changes
  - ☐ Establish a regular review cycle for continuous improvement
  - ☐ Other: _______________
- **Long-Term Strategy:**
  - ☐ Integrate user feedback into ongoing strategic planning
  - ☐ Establish permanent feedback channels for users
  - ☐ Other: _______________

Sample Recruitment Email Templates

1. Initial Invitation Email

Subject: Invitation to Participate in User Testing for [Court Resource, e.g., E-filing System]

Dear [Name],

We are reaching out to invite you to participate in an upcoming user testing session for [describe the court resource, e.g., the e-filing system]. Your feedback will help us improve this resource to better meet the needs of users like yourself.

Details of the Session

- **What**: User testing session to evaluate [describe tasks].
- **When**: [Date and time]
- **Where**: [Location]
- **Duration**: [Expected duration]

What to Expect

- During the session, you will be asked to complete a series of tasks using [court resource, e.g., the e-filing system].
- We will observe and record your interactions to identify any usability issues.
- Your feedback will be kept confidential and used solely for the purpose of improving the system.

As a token of our appreciation, participants will receive [describe incentive].

How to Participate

If you are interested in participating, please reply to this email by [RSVP deadline]. We will provide you with additional details and confirm your participation. *If you require any special accommodations (e.g., assistive technology, language interpreter), please let us know.*

If you have any questions or need further information, please do not hesitate to contact [Project Manager's Name] at [Phone Number] or [Email Address].

Thank you for considering this opportunity to contribute to the improvement of our court resources. Your participation would be greatly valued.

Best regards,

[Your Name]
[Your Title]
[Court Name]
[Contact Information]

2. Reminder Email

Subject: Reminder: Upcoming User Testing Session for [Court Resource, e.g., E-filing System]

Dear [Participant's Name],

This is a reminder about your upcoming participation in the user testing session for [court resource, e.g., the e-filing system]. We appreciate your willingness to contribute to this important project.

Details of the Session

- **What**: User testing session to evaluate [describe tasks].
- **When**: [Date and time]
- **Where**: [Location]
- **Duration**: [Expected duration]

What to Bring

Please remember to bring [select option: *a valid ID* | *any relevant documents* | *other:* _______________]. If you are participating online, ensure that you have a stable internet connection.

Contact for Questions

If you have any questions before the session, feel free to reach out to [Project Manager's Name] at [Phone Number] or [Email Address].

Thank you again for your participation. We look forward to seeing you at the session.

Best regards,

[Your Name]
[Your Title]
[Court Name]
[Contact Information]

3. Follow-Up Thank You Email

Subject: Thank You for Participating in User Testing for [Court Resource, e.g., E-filing System]

Dear [Participant's Name],

Thank you for participating in our user testing session for [court resource, e.g., the e-filing system]. Your feedback is important to us, and we greatly appreciate the time and effort you invested in this project.

Next Steps

We will be reviewing the feedback and observations gathered during the session to identify areas for improvement. Your input will directly contribute to increase the usability and accessibility of our court resources.

Stay Informed

If you would like to receive updates on the changes implemented as a result of this testing, please let us know. We will be happy to keep you informed.

Additional Feedback

Should you have any additional thoughts or suggestions that come to mind after the session, please do not hesitate to contact us at [Project Manager's Email Address].

Thank you once again for your valuable contribution to this important work.

Best regards,

[Your Name]
[Your Title]
[Court Name]
[Contact Information]

Informed Consent Form Template

Project Title:
e.g., Improving Usability of E-filing System

Testing Date(s):
e.g., February 1-15, 2024

Location:
e.g., Court Conference Room, Online via Zoom

Contact Information:
Project Manager's Name, Phone Number, Email Address

---

1. Purpose of the Study

We are conducting a user testing session to evaluate the usability and effectiveness of [describe the court resource, e.g., the e-filing system]. The feedback you provide will help us improve the system to better meet the needs of all users.

2. What Participation Involves

- You will be asked to [brief description of tasks, e.g., navigate the e-filing system and complete specific tasks such as filing a document].
- The session will take approximately [duration, e.g., 60 minutes].
- We will record the session [include whether audio, video, or screen activity is recorded] to analyze your interactions with the system.

3. Voluntary Participation

Your participation is entirely voluntary. You may choose to withdraw at any time without any consequences. If you decide to withdraw, any data collected before your withdrawal will still be used unless you request otherwise.

4. Confidentiality

- Your identity will remain confidential. Any information collected during this session will be anonymized.
- Data collected during this session will be securely stored and only accessible to the project team.
- Your feedback will be used solely for the purpose of improving the court resources and will not be shared outside the project team.

5. Risks and Benefits

- **Risks**: There are minimal risks associated with participation. You may experience some discomfort while navigating the system if you encounter difficulties.
- **Benefits**: While there is no direct benefit to you, your participation will help improve the usability of the court's resources, which may benefit you and others in the future.

6. Contact for Questions

If you have any questions or concerns about this study, you can contact [Project Manager's Name] at [Phone Number] or [Email Address].

---

7. Consent

Please indicate your understanding and agreement by signing below.

I have read and understood the information provided above. I voluntarily agree to participate in this user testing session.

- **Participant's Name (Printed)**: __________________________
- **Participant's Signature**: ______________________________
- **Date**: ___________________

Participant Demographic Information Form Template

---

1. Basic Information

- **Participant ID** (For internal use only): _______________
- **Date of Testing**:

---

2. Age Group

- **Please select your age group**:

  ☐ 18-24
  ☐ 25-34
  ☐ 35-44
  ☐ 45-54
  ☐ 55-64
  ☐ 65 and above

---

3. Gender

- **Please select your gender**:

  ☐ Male
  ☐ Female
  ☐ Non-binary
  ☐ Prefer not to say
  ☐ Other: _______________

4. Language Proficiency

- **What is your primary language?**
  - ☐ English
  - ☐ Spanish
  - ☐ Mandarin
  - ☐ Other: _______________
- **How would you rate your proficiency in English?**
  - ☐ Fluent
  - ☐ Intermediate
  - ☐ Basic
  - ☐ Not Proficient

---

5. Disability Status

- **Do you identify as a person with a disability?**
  - ☐ Yes
  - ☐ No
  - ☐ Prefer not to say
- **If yes, please specify the type of disability (check all that apply)**:
  - ☐ Visual impairment
  - ☐ Hearing impairment
  - ☐ Mobility impairment
  - ☐ Cognitive or learning disability
  - ☐ Other: _______________

6. Technology Use

- **How often do you use a computer or smartphone?**

  ☐ Daily
  ☐ A few times a week
  ☐ Once a week
  ☐ Rarely
  ☐ Never

- **How would you rate your comfort level with technology?**

  ☐ Very comfortable
  ☐ Somewhat comfortable
  ☐ Neutral
  ☐ Uncomfortable
  ☐ Very uncomfortable

---

7. Legal System Familiarity

- **How familiar are you with the legal system?**

  ☐ Very familiar
  ☐ Somewhat familiar
  ☐ Neutral
  ☐ Not very familiar
  ☐ Not familiar at all

- **Have you ever represented yourself in a legal matter?**

  ☐ Yes
  ☐ No

- **Have you used the [court resource being tested, e.g., e-filing system, court website, court forms] before?**

  ☐ Yes
  ☐ No

8. Additional Information (Optional)

- **Please provide any additional information you think is relevant for this study**:

Observation Data Collection Form Template

Project Name: ____
Date: ____________________
Observer: ___________________________________

Participant ID: ____________________

Task Information

- **Task Name/Description:** _________________________________

Observation Details

- **Task Completion:**
- Did the participant complete the task?
    - ☐ Yes
    - ☐ No
  - Time taken to complete the task: ____________________
- Any assistance required?
    - ☐ Yes
    - ☐ No
  - If yes, describe the assistance provided: ____________________
- **Errors and Missteps:**
  - List any errors or missteps observed during the task:
    - Error 1: ____
    - Error 2: ____
    - Error 3: ____

- **Participant Behavior:**
  - Signs of Confusion: ____
  - Signs of Frustration: ____
  - Signs of Satisfaction: ____
  - Other Notable Behaviors: _____________________________________
- **Think-Aloud Protocol:**
  - Key comments or thoughts verbalized by participant:
    - Comment 1: ____
    - Comment 2: ____
    - Comment 3: ____
- **Time on Task:**
  - Start Time: _____________________
  - End Time: _____________________
  - Total Time: _____________________
- **Non-Verbal Cues:**
  - Body Language Observations: _________________________________
  - Facial Expressions Noted: _____________________________________
  - Pacing and Pausing Behavior: _________________________________

Overall Feedback

- **Participant's Overall Impression:**
    - Positive Aspects: ____
    - Negative Aspects: ____
    - Suggestions for Improvement: __________________________________
- **Observer's Comments:**
    - Overall Evaluation of Participant's Experience: ____________________
    - Additional Observations: ______________________________________

General Survey

General Survey for Assessing Self-Help Materials

After using this resource [note: customize with the name of the resource], indicate your level of agreement with the following statements by checking the boxes below.

1. **I understand my case better.**
   - ☐ Strongly agree
   - ☐ Agree
   - ☐ I'm not sure
   - ☐ Disagree
   - ☐ Strongly disagree
2. **I feel better prepared to handle my legal issue after using this resource.**
   - ☐ Strongly agree
   - ☐ Agree
   - ☐ I'm not sure
   - ☐ Disagree
   - ☐ Strongly disagree
3. **Where did you find this resource? Check all that apply.**
   - ☐ Online – Google or Other Search
   - ☐ Online – Court Website
   - ☐ Online – Other: ___________________
   - ☐ Friend or Family Member
   - ☐ Lawyer or Non-Profit Organization
   - ☐ Clerk's Office or Self-Help Center
   - ☐ Other: _______________________

User Testing Staff Checklists and Training Materials

These checklists and reference cards are designed to be quick, actionable tools that court staff can use to ensure they cover all essential aspects of user testing. The checklists provide a step-by-step guide for different stages of the testing process, while the reference cards offer quick reminders and best practices.

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1. Pre-Session Checklist

A. Planning and Preparation

- ☐ **Set Clear Objectives:** Clearly identify the goals of the user testing session (e.g., usability, accessibility, task completion).
- ☐ **Develop Test Plan:** Outline tasks, scenarios, and key questions for participants.
- ☐ **Prepare Test Materials:** Have scripts, consent forms, and participant info forms ready. Make sure all materials are simple and accessible.

B. Environment and Equipment

- ☐ **Set Up the Space:** Choose a quiet, comfortable spot for testing. Arrange the room to avoid distractions.
- ☐ **Check Equipment:** Test all devices (e.g., computers, recording tools, assistive tech). Have backup equipment ready just in case.

C. Scheduling and Communication

- ☐ **Confirm Participant Availability:** Send out reminder emails or make calls to participants. Provide clear instructions on where, when, and what they need to bring.
- ☐ **Prepare for Accommodations:** Have scripts, consent forms, and participant info forms ready. Make sure all materials are simple and accessible.

2. During-Session Checklist

A. Facilitating the Session

- ☐ **Welcome Participants:** Greet participants warmly and make them feel comfortable. Introduce yourself and explain the purpose of the session.
- ☐ **Set Expectations:** Clearly outline what participants will be doing during the session. Reassure them that there are no right or wrong answers.
- ☐ **Review and Sign Consent Form:** Ensure participants understand the consent form and sign it before starting.

B. Conducting the Test

- ☐ **Set Up the Space:** Choose a quiet, comfortable spot for testing. Arrange the room to avoid distractions.
- ☐ **Check Equipment:** Test all devices (e.g., computers, recording tools, assistive tech). Have backup equipment ready just in case.

C. Managing the Session

- ☐ **Confirm Participant Availability:** Send out reminder emails or make calls to participants. Provide clear instructions on where, when, and what they need to bring.
- ☐ **Prepare for Accommodations:** Have scripts, consent forms, and participant info forms ready. Make sure all materials are simple and accessible.

3. Post-Session Checklist

A. Data Handling

- ☐ **Review Notes and Recordings:** Go over all notes and recordings right after the session. Ensure everything is complete and accurate.
- ☐ **Anonymize Data:** Remove any personal identifiers to protect privacy.

B. **Data Analysis**

- ☐ **Quantitative Analysis:** Calculate task completion rates, errors, and time taken.
- ☐ **Qualitative Analysis:** Identify common themes and issues from feedback and observations.

C. Reporting

- ☐ **Prepare a Report:** Summarize key findings and provide recommendations.
- ☐ **Share Results:** Present findings to your team and stakeholders. Discuss next steps and plan for follow-up testing if needed.

4. User Testing Staff Training Materials

Community Engagement Guidelines

1. Identifying Community Stakeholders

Involve key groups in your community to get valuable insights and feedback for user testing.

- **Key Stakeholders:**
  - Local legal aid organizations
  - Community advocacy groups
  - Underrepresented groups (e.g., non-native speakers, individuals with disabilities)
  - Self-represented litigants
  - Frequent court users (e.g., attorneys, paralegals)

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2. Preparing for Community Engagement

Follow these steps to effectively engage your community:

- **Research:** Understand your community's demographics, needs, and preferences.
- **Outreach Strategy:** Plan how to contact stakeholders via email, phone, or in-person meetings.
- **Materials:** Create clear, accessible materials that explain user testing and its importance. Offer them in multiple languages and formats if needed.
- **Flexibility:** Schedule sessions at times that work for your community, like after 5 pm or offer childcare to increase participation.

3. Evaluation and Continuous Engagement

Keep the conversation going with your community to maintain strong relationships and improve over time.

- **a. Post-Testing Evaluation:**
    - Gather feedback on the testing process from community stakeholders.
    - Check if your participant group was diverse and representative.
    - Identify areas for improvement in community engagement.
- **b. Long-Term Engagement:**
    - Keep regular communication with community stakeholders.
    - Invite stakeholders to future user testing sessions.
    - Set up a feedback loop for continuous input on court services.

Overview

Offering incentives to participants is a common practice in user testing. This guide outlines best practices for compensating participants fairly and legally, ensuring that incentives are appropriate and comply with ethical standards.

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1. Types of Incentives

- **Monetary Compensation**: Offer a fixed amount of money for participation. This can vary based on the length and complexity of the testing session.
- **Gift Cards**: Provide participants with gift cards to popular retailers or restaurants as a token of appreciation.
- **Non-Monetary Incentives**: Consider offering incentives such as free legal consultations, discounts on court fees, or recognition in community newsletters.

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2. Ensuring Fairness

- **Equal Compensation**: Ensure that all participants receive the same incentive to maintain fairness and transparency.
- **Appropriate Value**: The value of the incentive should reflect the time and effort required from participants. Avoid overly generous incentives that could be seen as coercive.
- **Compliance with Legal Guidelines**: Check local laws and court policies to ensure that the incentives offered are compliant with legal and ethical standards.

3. Managing Incentives

- **Clear Communication**: Inform participants about the incentive they will receive before the session. Provide details on how and when they will receive it.
- **Record Keeping**: Keep accurate records of incentives provided to participants to ensure transparency and accountability.
- **Follow-Up**: After the session, ensure that all participants receive their incentives promptly, and thank them for their time and contributions.

Best Practices for Remote User Testing

Conducting user testing sessions remotely can be highly effective when done correctly. This guide provides tips, tools, and best practices to ensure your remote user testing sessions are successful, whether you're testing court websites, forms, or other digital resources.

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1. Preparation for Remote User Testing

A. Choose the Right Tools

- **Video Conferencing Software**: Use reliable platforms like Zoom, Microsoft Teams, or Google Meet. Ensure the software supports screen sharing and recording.
- **Screen Recording Tools**: Tools like Camtasia, Loom, or the built-in recording feature in video conferencing software can capture the participant's screen activity.
- **Usability Testing Platforms**: Consider platforms like UserTesting, or Lookback, which are specifically designed for remote user testing.
- **Survey Tools**: Use online survey tools like Google Forms, SurveyMonkey, or Typeform to gather post-session feedback.

B. Prepare Your Testing Materials

- **Test Plan**: Clearly define your test objectives, tasks, and questions. Prepare a script for consistency across sessions.
- **Participant Instructions**: Create easy-to-follow instructions that explain the purpose of the session, what participants need to do, and how to use the remote tools.
- **Consent Forms**: Provide digital consent forms that participants can easily fill out and submit online.

C. Technical Setup

- **Test Your Technology**: Ensure your internet connection is stable and that all software is working properly. Test your setup from the participant's perspective.
- **Backup Plan**: Have a backup communication method (e.g., phone call) in case of technical difficulties.

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2. Recruiting and Preparing Participants

A. Recruitment

- **Recruit Participants**: Use email invitations, online sign-ups, or collaboration with community organizations to recruit participants. Ensure your participant pool reflects the diversity of your user base.
- **Confirm Availability**: Send confirmation emails with details on the session time, platform to be used, and any necessary preparatory steps.

B. Participant Preparation

- **Provide Clear Instructions**: Send participants detailed instructions on how to join the session, what to expect, and any preparation needed (e.g., installing software, ensuring a quiet environment).
- **Technical Assistance**: Offer a pre-session test run or technical support to help participants with setup issues.

3. Conducting the Remote Session

A. Starting the Session

- **Warm Welcome**: Greet participants and make them feel comfortable. Briefly explain the session's purpose and what you'll be asking them to do.
- **Obtain Consent**: Ensure participants have completed the digital consent form. Review key points to confirm their understanding.

B. Facilitating the Test

- **Provide Clear Instructions**: Guide participants through each task, explaining them clearly without leading them. Use a consistent script to maintain uniformity across sessions.
- **Encourage Think-Aloud**: Ask participants to verbalize their thoughts as they complete tasks. This helps you understand their decision-making process.
- **Observe and Record**: Watch for signs of confusion, frustration, or ease, and take detailed notes. Ensure screen sharing and recording are working correctly to capture the session.
- **Stay Neutral**: Avoid influencing the participant's actions or responses. Let them navigate tasks as naturally as possible.

C. Managing Technical Issues

- **Be Patient and Flexible**: If participants encounter technical problems, calmly troubleshoot or offer alternatives (e.g., using a different browser or device).
- **Adapt as Needed**: If major issues arise that cannot be quickly resolved, consider rescheduling the session or modifying the tasks to accommodate the participant's situation.

4. Post-Session Activities

A. Debriefing

- **Thank the Participant**: Express appreciation for their time and feedback. Ask if they have any additional thoughts or questions.
- **Gather Final Feedback**: If applicable, send a follow-up survey to gather more detailed feedback on their experience.

B. Data Management

- **Review and Store Data**: Immediately review screen recordings, notes, and any other data collected during the session. Ensure it is securely stored and anonymized if necessary.
- **Analyze Findings**: Begin analyzing the data by identifying common themes, issues, and areas for improvement. Use both qualitative (e.g., user comments) and quantitative (e.g., task completion rates) data in your analysis.

C. Reporting

- **Compile a Report**: Create a comprehensive report summarizing the findings, insights, and recommendations based on the user testing session. Include screenshots or video clips to illustrate key points.
- **Share with Stakeholders**: Distribute the report to relevant stakeholders and discuss potential next steps, including design revisions or additional testing.

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5. Tools

A. Recommended Tools

- **Video Conferencing**: Zoom, Microsoft Teams, Google Meet
- **Screen Recording**: Camtasia, Loom, built-in recording in video conferencing tools
- **Usability Testing Platforms**: UserTesting, Lookback, UserZoom
- **Survey Tools**: Google Forms, SurveyMonkey, Typeform

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1. Understanding the Role of a Facilitator

As a facilitator, your role is crucial in guiding participants through the testing process while ensuring that the data collected is accurate and valuable. Your responsibilities include:

- Preparing the testing environment.
- Explaining the purpose and procedures to participants.
- Observing and recording participant interactions.
- Ensuring participants feel comfortable and respected throughout the session.

Key Qualities of a Good Facilitator:

- Patience and Empathy: Understand the participant's perspective.
- Objectivity: Avoid leading participants or influencing their behavior.
- Attention to Detail: Carefully observe and note participant behaviors and reactions.

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2. Pre-Session Preparation

A. Preparing Test Materials

- Develop a detailed **Test Plan**, including tasks, scenarios, and key questions.
- Prepare any necessary **Consent Forms** and ensure they are easily understandable.
- Create **Participant Demographic Information Forms** to gather relevant background data.

B. Setting Up the Environment

- Choose a quiet, comfortable location free from distractions.
- Ensure that all necessary equipment (e.g., computers, recording devices, accessibility tools) is functional and set up properly.
- Test all technical aspects, such as screen recording software, before the session begins.

C. Scheduling Participants

- Confirm participant availability and send reminder emails with session details.
- Arrange for any necessary accommodations, such as language interpreters or assistive technologies.

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3. Conducting the User Testing Session

A. Greeting and Briefing Participants

- Greet participants warmly and make them feel comfortable.
- Explain the purpose of the session and what is expected from them.
- Ensure participants understand that their feedback is valuable and that there are no right or wrong answers.

B. Obtaining Informed Consent

- Review the **Consent Form** with the participant, emphasizing confidentiality and their right to withdraw at any time.
- Answer any questions they might have before obtaining their signature.

C. Facilitating and Observing the Session

Task Presentation

- **Clear Instructions:** Clearly explain each task to the participants without leading them. Use prepared scripts if necessary to maintain consistency across sessions.
- **Encourage Think-Aloud:** Prompt participants to verbalize their thoughts as they interact with the system. This helps you understand their reasoning and identify usability issues.

Observation and Note-Taking

- **Watch for Key Behaviors:** Observe whether participants can complete tasks successfully or if they encounter difficulties. Note any signs of confusion, frustration, or hesitation, along with specific comments they make.
- **Document Errors and Missteps:** Record any mistakes participants make, such as incorrect clicks, misinterpretations, or unsuccessful attempts to use a feature.
- **Time on Task:** Keep track of how long it takes participants to complete each task. This can help identify areas where the system or material is not as intuitive as intended.
- **Consistent Notetaking:** Use a structured format for your notes, organizing them by task or by participant. Be objective, recording what you see and hear without adding personal interpretations. Use direct quotes and timestamp notes to link them with specific moments in the session.
- **Highlight Key Moments:** Mark significant events or behaviors that stand out, such as moments of confusion, breakthroughs, or unexpected actions.

Managing Time and Handling Challenges

- **Time Management:** Keep track of time during the session and gently guide participants if they get stuck or go off track. Ensure the session flows smoothly while allowing participants enough time to complete each task.
- **Handling Participant Frustration:** If a participant becomes frustrated, offer to take a short break or provide additional instructions. Avoid intervening unless the participant asks for help or is completely stuck. Stay neutral and avoid giving feedback on their performance.

Remaining Unobtrusive

- **Minimize Distractions:** Avoid speaking or interacting with the participant unless necessary. Sit quietly and make minimal movements to avoid drawing attention to yourself.
- **Discreet Notetaking:** If possible, take notes on a laptop or tablet with the screen dimmed to reduce the risk of distracting the participant. If using paper, write quietly and keep your notes out of the participant's line of sight.

Capturing Non-Verbal Cues

- **Observe Body Language:** Pay attention to participants' body language for signs of discomfort, frustration, or confidence. Note if they lean forward, cross their arms, or repeatedly look away from the screen.
- **Facial Expressions:** Watch for facial expressions that may indicate confusion, satisfaction, or frustration. Smiles, frowns, or raised eyebrows can all provide valuable insights.
- **Pacing and Pauses:** Notice if participants pause frequently, speed through tasks, or seem to take a long time to make decisions. These patterns can reveal areas where the system is intuitive or where it needs improvement.

Debriefing

- After the tasks are completed, engage in a brief debriefing session.
- Ask open-ended questions to gather additional feedback (e.g., "How did you feel about the process?").
- Thank the participant for their time and contributions.

4. Post-Session Activities

A. Reviewing and Storing Data

- Immediately review your notes and recordings while the session is still fresh in your mind.
- Organize and securely store all data, ensuring confidentiality is maintained.

B. Data Analysis

- Use your notes and recordings to identify common themes, issues, and areas for improvement.
- Analyze both quantitative data (e.g., task completion rates, error rates) and qualitative data (e.g., participant comments, observed behaviors).

C. Continuous Improvement

- After each session or project, gather feedback from participants and stakeholders to refine your approach for future testing.
- Reflect on what worked well and what could be improved for future sessions.
- Collaborate with your design and development teams to implement changes and plan follow-up testing as needed.

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