OAS first draft Questionnaire

Users should know the following first or understand the registration process:

	Determine if you need to apply
→	Decide when you want your OAS to start
→	Submit your application
→	Receive a response from us
→	Review your application status
	If you disagree with the decision

As well login to Service Canada to make an Account.

My Service Canada Account (MSCA) - Canada.ca

https://www.canada.ca/en/employment-social-development/services/my-accou…

My Service Canada Account (**MSCA**) is a secure online portal. It allows you to apply, view and update your information for Employment Insurance (**EI**), Canada Pension Plan (**CPP**), Canada **Pension Plan disability** and Old Age Security (**OAS**).

OAS Unblock and Call Back Virtual Assistant Usability Testing

Background and objectives

How does a random sample set of Canadians respond to the OAS-GIS-CPP VA pilot build and request for a callback because of Blockage? For example: Wrong mailing address.

In order to understand and improve the usability of our product, we want to conduct a set of **Five** user tests. Those tests will be examining the effectiveness of the Virtual Assistant dialogue flow as participants complete two tasks:

> *Interact with the chatbot as though you are an Employment Insurance client with a missing Record of Employment.*

1) Interact with the chatbot as though you are an OAS-GIS-CPP client with a incorrect address.

Hypothesis

While we believe the current prototype is functional and that our primary tasks can be completed , we think the usability of the prototype can be improved. We would like to know how a sample set of users respond during an interaction with the Virtual Assistant. With this test, we seek to discover what interface, navigational or conversional could be made to the VA.

Research Techniques

- Research technique: moderated usability test
- Remote
- Digital prototype: https://emerald-prototype.netlify.app/
- Duration: 35 minutes (10 minutes setup and introduction, 20 minutes on testing, 5minutes debrief and conclusion)
- Compensation: none, as per ESDC's direction.
- Technology needs: Interviewees from Service Canada Labs, VA Prototype, Remote meeting software, Web Accessible meeting WCAG 2.0 to 2.2, Bill-C81, and Canada.ca Webs Standards for public facing pages.

Participant profile

Users:

- Five participants, representative sample of users of Service Canada digital services/products. *While participants recruited through Service Canada Labs may be somewhat familiar with our work, prior knowledge or specific skillset are not necessary.*
- Recruited through Service Canada Labs channel
- One to Three participants should be French speakers (if possible)Personal information We may

wish to collect:

- Age/DOB
- Home City, Province (Optional?)
- Official Language
- Rating the Service

Any personal information, meeting notes and recordings will be destroyed following the production of our final report

Team and stakeholders
- Kodi: Moderator [Contractor]
- Thomas: observer/notetaker [ESDC employee]
- Farwa/Marie: notetakers [ESDC employee/Contractor]

Timeline:
- Within the next Sprint (2)

Outputs

- Qualitative notes on the testing session
- User testing insights report with recommendations for improving usability
- Debrief sessions by team members

VA Categories in a pull-down menu to start the process for Mary.

- View estimated CPP benefits
- View application status
- View payment information
- Child-rearing provision
- Federal voluntary tax deduction
- Change banking information
- Change of address
- Telephone number(s)
- Update your name, marital status or date of birth
- Give consent for someone to communicate with Service Canada about CPP, CPP disability or OAS on my behalf
- Submit a request for reconsideration of a CPP/OAS decision
- Submit a Declaration of attendance at school or university
- CPP Statement of Contributions printed from MSCA is legal/official documentation
- Statement of Contributions to the Québec Pension Plan
- How to delay receiving the OAS/GIS pension after receiving a notification letter of automatic enrolment

If registration not been completed Client to be directed to the Application Process.

- Apply for the Old Age Security (OAS) pension and the Guaranteed Income Supplement (GIS)
- Apply for a CPP retirement pension
- Apply for CPP disability benefits
- Apply for CPP Death benefit
- Apply for CPP Survivor's pension

Callback Dialogue Flows

Top decision Miro (Unblock Path) Marie's New flow.

Revised and shortened.

Virtual Assistant

VA PROMPT:

> Hi Mary, I'm your virtual

> I looked at your Old Age Security pension auto enrolment and I can see it's blocked. Do you want me to look into it?

Side notes:

> I looked at your Old Age Security pension auto enrolment and I can see it's blocked. Do you want me to look into it?

> I have simplified the copy BUT what I have above = aligned with the use case. She would have received a letter at 64+1 (that's based on residency + taxes + having CPP or QPP [i think]). Then, as the file is processed, she receives an update saying her enrolment is threatened by a missing XYZ. **Thought! "I can see" = is it too figurative?**

Select one   Type:

[Yes] [No]   **OR** | Text input Field |

[Yes]

.

VA PROMPT:

> So, it looks like all we're missing is your home address. What is your current address?

I need more information.
Side Notes:

> this might be needed depending on what OAS defines as your "residence"? TBD must go look at the procedure book again!

> When we mean "address of residence" we mean where you XYZ. And by "primary" we mean where you live XYZ days a year. Does this sound like your living situation.

> Wording is tbf here

No, my living situation is different

Sorry, it looks like something went wrong! + 1- I can't find a matching address in [Canada Post] database. OR 2- I'm unable to update your file right now. + I'm able to set up a callback with an officer from Service Canada, who'd be able to help you over the phone. Does that sound good to you?

Select one   Type:

[Yes]   [No]   **OR**   Text input Field

Yes

Callback

Select one   Type:

[Yes]   [No]   **OR**   Text input Field

No

VA PROMPT:

Ok, no problem. I'll be here if you need me! Before you go, could I ask you to rate the service you received today? 1= 😡 2= 🙁 3= 😐 4= 🙂 5= 😄

Thank You!

Callback Dialogue Flows
(Main flow Middle Yes) Marie's flow.

Virtual Assistant
VA PROMPT:

> Hi Mary, I'm your virtual

> I looked at your pension file and I can see auto-enrolment is blocked. Do you want me to look into it?

Select one	Type:
Yes No **OR**	Text input Field

Yes

.

VA PROMPT:

> So, it looks like all we're missing is your home address. What is your current address?

Select one	Type:
Yes No **OR**	New Address

yes

Address validation UX/UI powered by an API

> VA auto populates address options directly in the interface

Clicks on address
VA PROMPT:

> Ok, so your address is: [X]. Is everything spelled correctly? Can you confirm this is your home address?

Select one	Type:
Yes No **OR**	Text input Field

yes

> Ok, great, I've updated your home address. I've also unblocked your pension auto- enrolment.

Side Notes:

> Should we let them know nothing else is required/action is completed?

> hat's all the information I needed. I'm going to pass your file along to the next officer, who will determine your eligibility for an OAS pension.

> as per the use case they are already eligible (and something goes wrong between 64 +1 and (64+9)

> like it but it doesn't totally align with the use case. Mary already knows she is eligible, because she would have received a letter at 64+1 (that's based on residency + taxes + etc.). Then, as the file is processed, she receives an update saying her enrolment is threatened by a missing XYZ

> Thank you!

Callback Dialogue Flows

(Main flow Middle No) Marie's flow.

Virtual Assistant
VA PROMPT:

> Hi Mary, I'm your virtual

> I looked at your pension file and I can see auto-enrolment is blocked. Do you want me to look into it?

Select one		Type:
Yes No	**OR**	Text input Field

No

> Ok, no problem! I'm able to set up a callback with an officer from Service Canada, who'd be able to help you over the phone. Does that sound good to you?

Select one		Type:
Yes No	**OR**	Text input Field

yes   Callback

No

VA PROMPT:

> Ok, no problem. I'll be here if you need me! Before you go, could I ask you to rate the service you received today?
>
> 1= 😡 2= 😟 3= 😐 4= 🙂 5= 😄

User makes selection.

> Thank you!

Callback Dialogue Flows

(Happy path Just Yes) Marie's New flow.

Changing Address

Virtual Assistant

VA PROMPT:

> Hi Mary, I'm your virtual

> I looked at your Old Age Security pension auto enrolment and I can see it's blocked. Do you want me to look into it?

Select one		Type:
Yes No	**OR**	Text input Field

Yes

VA PROMPT:

> So, your Old Age Security pension does not have an address attached to it. Would you like to add your address today?

Select one		Type:
Yes No	**OR**	Text input Field

Yes

Address validation UX/UI powered by an API

> VA auto populates address options directly in the interface

Select one		Type:
[Yes] [No]	**OR**	Text input Field

Clicks on an address

VA PROMPT:

> Ok, so your address is: [X]. Is everything spelled correctly? Can you confirm this is your home address?

Select one		Type:
[Yes] [No]	**OR**	Text input Field

[Yes]

VA PROMPT:

> Ok, great, I've updated your home address. I've also unblocked your pension auto-enrolment.

> Before you go, could I ask you to rate the service you received today?
> 1= 😡 2= 🙁 3= 😐 4= 🙂 5= 😄

User makes selection

> Thank you!

Participant # Scenario 2

Some one is trying to cancel EDSC OAS-GIS-CPP because of a death but is past due by one year.
They cannot find the death certificate because the Undertaker Service all their records were destroyed in a flood

Mary's sister died a year ago she realized checks were being added to her late sisters account after a year not knowing about this account, she had discovered a bank statement in her things, so Mary contacted the bank and indeed OAS-GIS-and CPP payments have been her account for over a year. Mary wants to do the right thing and give the money.
Below is the solution that the VA will have to mimic.

- *See:* How to cancel benefits

If the death occurred in Canada

In most cases, Service Canada does not require proof of death to cancel OAS and CPP benefits. In situations where proof of the date of death is required, Service Canada will notify the estate or the person responsible for handling the deceased's affairs.

INTERVIEW SCRIPT

Hello! My name is [moderator's name], and I am going to be walking you through this session today. I would like to introduce my colleagues [names here], who will be observing and taking notes throughout the session.

As you may know, we are testing a website prototype that we are working on to see what it's like when people use it. I want to make it clear right away that we are testing the website and not you. We want to improve the system, so we need to see how you really use it.

As we go along, I will be asking you questions, and I am going to ask you to think out loud and to tell me what's going through your mind. This will help us understand your thought process.

Regarding confidentiality, any information you provide will be treated as confidential. Your responses will be aggregated with other respondents, and you will remain anonymous. To minimize any mistake on our end, we ask that you do not provide any information during the session that can make you identifiable. Please note, you have the right to refuse to answer questions or withdraw from the

interview at any time

So that we do not miss anything in our notes, we would like to record this session. I understand you have already consented to being recorded. As a reminder, the recordings will be used only to help us figure out how to improve the site, and it will not be seen by anyone except the people working on the project.

Following the production of our research report, our meeting notes and session recording will be destroyed after two years.

Do you have any questions before we begin?
Response:

Mary's father has moved back to Greece, and he has just turned 65 while he was away and did transfer his OAS-CPP payment to a Greece bank account. Mary would like to help her father asking if she could work on his behalf getting the information changes at SSC.

Note: It can take up to 30 days for changes to your banking information to take effect. To ensure your next payment is sent to your new account, give us your new banking information at least 30 days before your payment date.

It is not possible to change the information for foreign direct deposit online. To change your direct deposit, [Contact Employment and Social Development Canada (ESDC) - Canada.ca](#)t o speak with one of our agents over the phone.

For Call back

- *See:* [Change banking information](#)

Give consent for someone to communicate with Service Canada about CPP, CPP disability or OAS on my behalf

To view, add, change and/or delete an authorized person who has your consent to communicate with Service Canada about your CPP, CPP disability or OAS account, select Give consent for someone to communicate with CPP/OAS on my behalf.

INTERVIEW SCRIPT

Hello! My name is [moderator's name], and I am going to be walking you through this session today. I would like to introduce my colleagues [names here], who will be observing and taking notes throughout the session.

As you may know, we are testing a website prototype that we are working on to see what it is like when people use it. I want to make it clear right away that we are testing the website and not you. We want to improve the system, so we need to see how you really use it.

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destroyed after two years.

Do you have any questions before we begin?

Response:

Participant # Scenario 4

Mary's parents have decided it is time to move to a senior's home for additional care. They need there address and telephone numbers changed.

Note: It is not possible to change the information for foreign addresses online. To change your address, contact us to speak with one of our agents over the phone.

- To change your address and select the effective date, select Address.
- Once you made the change and received confirmation, you may use the link at the bottom of the page to view your changes right away.

- *See:* Change of address

- *See:* Telephone number(s)

INTERVIEW SCRIPT

Hello! My name is [moderator's name], and I am going to be walking you through this session today. I would like to introduce my colleagues [names here], who will be observing and taking notes throughout the session.

As you may know, we are testing a website prototype that we are working on to see what it is like when people use it. I want to make it clear right away that we are testing the website and not you. We want to improve the system, so we need to see how you really use it.

As we go along, I will be asking you questions, and I am going to ask you to think aloud and to tell me what is going through your mind. This will help us understand your thought process.

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So that we do not miss anything in our notes, we would like to record this session. I understand you have already consented to being recorded. As a reminder, the recordings will be used only to help us figure out how to improve the site, and it will not be seen by anyone except the people working on the project.

Following the production of our research report, our meeting notes and session recording will be destroyed after two years.

Do you have any questions before we begin?
Response:

Information

- Before we start, to know a bit more about who you are. Can you please tell me how old you are?
  Response:
- Location where they live? (Optional?)
  Response:
- Can you rate your comfort with digital technologies on a scale of Ten? One being you are never online, and ten being you are an Internet *techie*? (Meaning you navigate the internet with ease and it is a natural extension of what you do daily).
  Response:

Instructions

1. We have sent you as part of the session invite could you click on the link.
2. Just in case you do not have it on hand, I will copy/paste it in the chat box of our videocall window.
3. I want you to try to find a project called the "Virtual Assistant"
   Kodi - I question this search, if you do take them to the prototype?

   Now, please describe and read aloud what do you see on the page?
   Response:
4. Probe further:

   a. What do you think is the goal of this page?
      Response:
   b. How do you feel about it?
      Response:

5. Now, let's say we want to try out the Virtual Assistant. How would you go about it?
   Response:

   If the user has not identified a way into the interface after a significant pause exploring how to go about next steps in the scenario, assist them at this point by directing them to click the blue 'Meet the Virtual Assistant' button.

VIRTUAL ASSISTANT INTERFACE QUESTIONS

- Now we've opened the virtual assistant. Please describe what you see and read out loud the content of the page.

    Probe further:
    Response:

What is being communicated to you here?
Response:

> How do you feel about the page?
> **Response:**
> o Is there anything you would add, or anything you would remove?
> **Response:**

- You want to interact with the virtual assistant. Can you show me and describe how you would do that?
    Response:

- *If user press yes OR type in yes:*
- What is the Virtual Assistant suggesting here?
- How do you feel about
  the answer given by the
  assistant?Probe further:
    > o How would you feel about having a
    >   virtual assistant for solving your Social
    >   Security issue?

- *If user press no OR type in no:* Can you tell me why you've chosen to answer no?

    Probe further:

    > o If you wanted to go back and change your answer, how would you go about it?

CALLBACK FLOW QUESTION

Now let's start the process again, but this time, imagine your situation is a bit different. You were blocked for completion because…

- Your 65 Birthday has past Four weeks later, you have not heard anything about your first OAS check. Looking for answers, you log into the Service Canada Digital Centre, and find a new message in yourInbox…
- User starts the callback dialogue: Describe what you see here – what is being communicated?
- Is this useful?

Probe further:

- Does the information and language feel accessible to you?

- *Allow user to click through:* Let's continue and complete the flow. What do you think the confirmation number is for? How does this line up with your prior expectations of what the VA can do?
  - Do you feel like anything is missing from the experience?

EMAIL FOLLOW UP QUESTIONS

- Can you read aloud the answer given by the virtual assistant?
  Response:
- Can you show me the next step you would take at this point?

Probe further

Response:

- Can you tell me why you've answered [yes/no]?

Response:

If yes
Response:

- I see you've answered *yes, send email*. Can you show me what you would do next?

  If update is requested

  - Now, the interaction is completed. Can you show me how you would answer thenext question?

    Probe further:

- Why did you choose to receive an update?
- Why did you choose email/text/both?
- Is there any other way you'd like to be notified of an update?
- How would you rate the overall service?
- At this point, is there anything you'd like the virtual assistant to do or speak?

If update is NOT requested

- Now, the interaction is completed. I also see you've chosen to not receive an update.

  Probe further:

  - Can you tell me why?
    Response:
  - How would you rate the overall service?
    Response:
  - At this point, is there anything you'd like the virtual assistant to do or speak?
    Response:

If no

- I see you've answered *no, don't*

  send email. Can you tell me

  why?}

  Probe further:

  - Did you expect the assistant to react differently?
    Response:
  - What would you have liked to see?
    Response:
  - How would you rate the overall service?
    Response:
  - At this point, is there anything you'd like the virtual assistant to do or say?
    Response:
  - If you wanted to go back and change your answer, how would you go about it?
    Response:

CONCLUSION QUESTION

OAS Technical Question Interface layout and displays:

- Did the Interface offer clear and precise instruction?
  Response:
- Did the reaction times meet with the urgency?
  Response:
- Could you use the service with other devices such as Tablets or Phones?
  Response:
- Do you use assistive technologies like screen reads or brail keyboards, keyboard only navigation?
  Response:
- What did you think of the overall presentation of the Service?
  Response:

Thank you for your time!

OAS User Question getting a positive feeling:

- Overall, what did you think of your experience a positive one with of the virtual assistant?
  Response:
- How did you find interacting with the assistant?
  Response:
- Do you think a product like this would be helpful to you?
  Response:
- Is there anything you'd like to add to the virtual assistant? Anything you would change?
  Response:
- On a scale of 5, how easy (1) or difficult (5) was interacting with the virtual assistant over all?
  Response:

Thank you for your time!

OAS User Question getting a Negative feeling:

- Overall, what did you think of your experience failed with of the virtual assistant solving your specific problem?
  Response:
- Were you were confused by the virtual assistant Reponses?
  Response:
- Were you forced always to a call an OAS representative?
  Response:
- Is there anything you'd like to add to the virtual assistant? Anything you would change?
  Response:
- On a scale of 5, how easy (1) or difficult (5) was interacting with the virtual assistantoverall?
  Response:

Thank you for your time!