

## Digital Identity Scotland Programme Board

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## Digital Identity Scotland Programme Board User Research Activity update

### Purpose

1. For the Programme Board to be updated on the user research work for the Online Identity Assurance Programme.

### Detail

2. The User Research Plan for Alpha at **Annex A** sets out the strategy for how user research will be conducted during the Alpha phase. As we are working agilely the activities are planned in and recruitment undertaken, but the exact focus of research is determined in sprint planning, depending on the project needs. This plan should be considered as a flexible document, which will flex around the Alpha needs and support the emerging work.
3. User Research and Service Design activity for February 2019 in **Annex B** provides a brief overview of the activities undertaken since Alpha has commenced and high level results.

### Recommendation

4. That the Board notes the content of the User Research Plan and overview of the high level results.

Scottish Government Digital Identity Scotland Team

March 2019

# User Research plan for Digital Identity Scotland in Alpha

## 1. Overview

The Alpha for Digital Identity Scotland will run two streams. The Online Identity Exchange (OIX) proposal describes them as follows:

- The first stream will seek to deliver a working Proof of Concept to test technical interoperability of services and to support user research. It will use “real-world” examples of the need for Online Identity Assurance and is intended to demonstrate that a defined sub-set of the overall required functionality can be quickly and cost-effectively implemented using a combination of methods and technologies provided by participant organisations.
- The second stream will be an analytical task seeking assessing the steps that will be required to be taken – by the Scottish Government or service providers – to deliver an interoperable and standardised digital identity service for Scotland

The user research will support the first stream, while informing the second. We will test use cases for the creation and use of digital identities in the context of cDLA and the Single Person Council Tax Discount to understand what the user experience is like and what we can learn from it to determine how the project should proceed into beta.

## 2. Principles of user research in Alpha

### Proof of concept user testing

User journey and research work will run parallel to the technological work of the proof of concept stream, aiming to support and supplement the work done by OIX partners with the intention of merging in the later stages of the Alpha. It will run in sprints, with each sprint focussing on a different aspect of the Identity Verification process or user group. The following principles will be followed to ensure the research is as useful as possible:

- A date for research will be set in each sprint to allow for planning to happen (rooms booked, recruitment)
- For each round we will aim to recruit if possible:
  - Users with traditional ID
  - Users with barriers (see [What we know about our users document](#))
  - Users of assistive technology (at appropriate points)
- We will start user testing the journey on lo-fi prototypes, progressing to a technical proof of concept. In the latter only test data from a script provided will be used.
- Findings from the user testing will be fed back to both streams rapidly.

- User research findings will be shared more widely via show and tells and blog posts.

### Understanding more about our users

- From our discovery work, it was established that there are still user groups whose experiences we do not know enough about. To rectify this, we will run research aimed specifically at understanding more about users and their experiences and attitudes to Digital Identity. This will be done through;
- Contextual research with Local Authorities
- Further research on specific user groups (identified as priorities during Discovery)
  - under 18s
  - proxies
  - non UK citizens

### 3. [Research objectives/questions](#)

During planning and throughout the Alpha we will continually refine what questions we are asking. We will run regular “question workshops” with the team to surface any questions that arise during the Alpha that should be fed into the user research. These questions will be prioritized and will form the basis of the user research script for each sprint. Some overarching questions already identified are:

- Understand the experience of different users in using the prototyped digital identity services in order to understand any barriers to ease of use
- Understand the response of users to the prototyped digital identity services – would they be comfortable using them for real, what concerns them, how could it be made better, etc.;
- Understand the response of users to the identity evidence required and their ability to provide that evidence.
- Explore how to design the process of creating a digital identify face to face that can then be access online.
- Where should identity come in the user journey?
- What do users expect from the reuse of an identity? How can we make this easy to reuse?
- What is the impact on users if the service is unavailable? What are their expectations around this?
- Is it clear where users should go if they have a problem with online identity?
- How do users feel about validating their identity online? How can we increase trust in this?

### 4. [User groups](#)

One of the main things which affects user’s experience of proving their identity is their

access to traditional identity documents. We will therefore be looking to speak to:

- People with conventional identity evidence (passports, credit history)
- People without conventional identity evidence
  - Using face-to-face process at either Social Security or Local Authority
  - Using face-to-face process at Post Office

Our priority will be users with barriers to access, so we will prioritise them during sprint planning

## 5. Working with Alpha partners

We will work openly and collaboratively as part of the team. Where possible, partners and wider team members will be invited to support, observe and help make sense of any research during Alpha. The level of involvement of individual partners will depend on the organisation. Below we have outlined our current expectations of this working relationship@

- North Lanarkshire need to be consulted on the journey and the results shared with them and invited to comment on the findings
- Social Security – Work with user research team, have ID&V journey as part of the user testing for Digital Portal and DLAc.
- Conduct standalone testing truncated journeys for both services to look at reuse of ID
- SiteKit (and any other technical partners) will be encouraged to attend and support the research, especially when the technical proof of concept is functional enough conduct user testing on it as part of ID&V journey using test data.

## 6. Ethic plan

An ethics has been developed by the user researcher in line with the process as defined and safeguarded by the Office of the Chief Designer. It has been signed off by the Head of User Centred Design.

## 7. User Research timetable

Sprint	UR activity and date	User groups and recruitment methods
<b>Sprint 1</b>	Planning North Lanarkshire Council	One stop shop visit, talking to customer support staff
<b>Sprint 2 (Build)</b>	User journey (wireframe) 1 testing (paper or wireframe)	<b>Private</b> and <b>convenient</b> user groups (private recruitment)

Thur 7 <sup>th</sup> Feb – Wed 27 <sup>th</sup> Feb	Wed 27 <sup>th</sup> and Thur 28 <sup>th</sup> Feb (Edinburgh)	based on attitudes by Taylor MacKenzie)
<b>Sprint 3 (Build)</b> Thurs 28 <sup>th</sup> Feb - Wed 20 <sup>th</sup> March	Co-design 1: Privacy groups TBC  User journey (wireframe) 2 testing (paper or wireframe) w/c 18 <sup>th</sup> March (Edinburgh)	<b>Privacy users</b> (recruited via privacy groups, SG comms supporting recruitment)  <b>Target group</b> (recruited via experience panel)
<b>Sprint 4 (UX testing)</b> Thur 21 <sup>st</sup> March – Wed 10 <sup>th</sup> April	UX testing w/c 25 <sup>th</sup> March (TBC) and 1 <sup>st</sup> April (island location)  Co-design 2: TBC 8 <sup>th</sup> April	<b>Thin and fat file users</b> (experience panel, citizens who apply for benefits) <b>Accessibility testing:</b> Include 2-4 users with an impairment that presents a barrier when accessing the internet.  Target group TBC
<b>Sprint 5</b> Thur 11 April – Wed 24 <sup>th</sup> April	User journey (wireframe) 3 testing w/c 8 <sup>th</sup> April (Inverness)	<b>Target group TBC</b> (recruited via experience panel and stakeholder groups)
<b>Sprint 6 (UX testing)</b> Thurs 25 <sup>th</sup> April – Wed 8 <sup>th</sup> May	UX testing w/c 29 <sup>th</sup> April (Glasgow and East Kilbride)	<b>Thin and fat file users</b> (experience panel, citizens who apply for benefits)
<b>Sprint 7 (Wrap up)</b>		

**Online Identity Assurance Programme Board – Product Vision**

# User Research and Service Design activity for February 2019

The delivery team worked on mapping out the user journey for citizens verifying their identity online, to complement the technical proof of concept. The user journey considers how the citizen will experience different journeys and how to design them.

## 1. User journey development

The first journey we mapped out for the first round of testing was the “happy path”. This looked at a successful journey for a citizen who has access to traditional forms of ID. The journey involved:

- Going to apply for a benefit online
- Setting up an account with an IDP
- Applying for the benefit
- Pausing their application and using the IDP to resume
- Verifying their ID online with the identity provider
- Submitting their application

## 2. User research objectives

We looked at this in user testing on the w/c 25<sup>th</sup> February. We were looking to find out:

- What is citizens’ reaction to creating an account with an IDP at the start of an application?
- How do citizens feel about using an IDP to resume a social security application?
- How do citizen’s feel about having to go through the ID verification at the end of the application process and prior to submitting? Would they prefer it when they register with the IDP at the start?

This journey was mocked up into clickable wireframes and we tested it with eight citizens.

## 3. Who we spoke to

Eight citizens were recruited to the following brief:

- All to have standard identity evidence available to them (e.g. passport, driving licence, council tax bill, bank statement)
- Four to have applied for social security benefits in the past two years
- A spread of demographics
- 50:50 male:female
- All to be willing to use an online service to identify who they are (e.g. Post Office, Experian, Verify)

#### 4. How the research was conducted

The user researcher held one on one interviews with participants. We found out about their previous experience of proving their identity and then walked them through wireframe designs that illustrated the user journey.

The user researcher was supported by other members of the Digital Identity Scotland team, SiteKit and Social Security ID&V product owner in taking notes and helping pull out the key findings from the research.

#### 5. What we found out

The findings from this work will be collated and fed into the development of the user journey. High level findings are:

- **Citizens want a reusable ID account:** Participants actively understood the benefits of setting up an ID account they can use to access other public services “Obviously you can use that again for other services.” Participant 7.
- **IDP log in was accepted:** Participants did not object to having to register with the Post Office to create an “identity account” at the start of the application process.
- **Citizens need to understand why they are being asked for information:** There was confusion over why participants were being asked information about their financial history as part of the Post Office process and it was confused with with process of a credit check.
- **IDP content impacts the citizens understanding and experience:** The journey had screen shots from the Post Office verification process. The knowledge page referred to the “credit facility” and all of the participants were unclear what that meant. Social Security is aiming to have a content with a reading age of eight years old. Private IDPs have not produced their content to the same level.
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- **The project needs to define what “presence” the hub that Digital Identity Scotland will create has:** The hub pages were unbranded. Some participants called it “limbo”, other said they expected to have the branding/reference to the IDP brand. The project team needs to determine what presence they feel they need to have and examine this further in user testing.
- **Trust and the feeling that the IDP is “legit” is important:** Discussion around whether to choose myaccount or the Post Office raised interesting points about how citizens need to feel the IDP is valid and trust them. The Post Office is a recognised brand and is considered “local” because of their branch network. However, some citizens selected myaccount, even if they did not recognise the brand, because it was “government” and therefore could be considered trustworthy.
- **Participants tolerated the double entry to apply for the service:** In the journey citizens would need to fill in their detail for the benefit application, and then again for the identity check. In the mock up that we created the participants accepted this – however it should be noted that this was not a full end to end application.

## 6. What happens next

The key findings from this research will be captured in a short report.

The delivery team will then plan the next rounds of research in March. This will include:

- A co-design session with individuals with privacy concerns
- Another round of user research on another user with participants from the Scottish Government Experience Panel
- Deep dive on site visit with relying parties, with a business analyst, to understand the current challenges and the as-is journey for ID&V currently.

Scottish Government Digital Identity Scotland Team  
March 2019