Testing Out of the Office:

catch real users in the field

Note taking guide

This is a tool for a note taker to use in usability tests with real users, whether out in the field or more formally in your office conference room. Notes to the note taker are gray. We’ve provided some example pick-lists and ratings just to give you some ideas for making data collection easier and quicker for the note taker. This matches the moderator’s guide for testing with real users, so the assumption is that you’re conducting usability testing on ballots.

# Questions from the participant before starting the tasks

Record questions that participants had for the moderator before they started the usability testing tasks.

# Tasks (up to 10 minutes)

**What to look for while the participant works:**

* How easily did the participant find the name of the person they wanted to vote for?

\_\_\_ right away, no hesitation

\_\_\_ looked around for more than a few seconds

\_\_\_ asked the moderator for help

Comments the participant made:

* How easily did the participant find the contest/proposition they wanted to vote on?

\_\_\_ right away, no hesitation

\_\_\_ looked around for more than a few seconds

\_\_\_ asked the moderator for help

Comments the participant made:

* What problems did they have marking the ballot?

\_\_\_ put an X rather than filling the bubble

\_\_\_ didn’t fill the bubble enough

\_\_\_ filled the bubble too much

\_\_\_ marked a wrong choice because they lost alignment

\_\_\_ thought the marker belonged to a different contest or candidate

* Did the participant undervote or overvote? Why? What comments did they have about that?

**Undervoted** because:

\_\_\_ didn’t feel informed enough about the contest

\_\_\_ didn’t see the contest

\_\_\_ didn’t see more than one contest

Overvoted because:

\_\_\_ didn’t understand the instructions

\_\_\_ didn’t realize it was a Vote for 1 contest

\_\_\_ wanted to “protest vote”

\_\_\_ voted for first recognizable candidate, then saw the candidate they wanted

Comments from the participant:

* Did the participant skip any contests or propositions? Why? What comments did they have about that?

\_\_\_ skipped \_\_\_\_ contests

Why?

* What questions did the participant ask about while using the ballot? After using the ballot?
* Did the participant find the instructions?

\_\_\_ Yes

\_\_\_ No

\_\_\_ Was prompted by the moderator

* Did the participant read the instructions?

\_\_\_ Yes

\_\_\_ No

\_\_\_ Was prompted by the moderator

* If the participant did read the instructions, how helpful were they? What questions and problems did the participant have understanding the instructions?

\_\_\_ participant easily read the instructions and summarized them accurately

\_\_\_ participant stumbled over words

\_\_\_ participant worked over phrases or clauses more than once

Questions from the participant:

How easily and successfully did the participant write in a candidate?

\_\_\_ wrote in name and filled the bubble

\_\_\_ wrote in name but forgot the bubble

\_\_\_ filled a bubble, but left off the name or got the name wrong

Comments and questions from the participant about write-ins:

Did the participant know what to do if they made a mistake on their ballot?

\_\_\_ Yes (get a new ballot from a poll worker)

\_\_\_ No, did not know you could get a replacement ballot to correct mistakes

What the participant said they would do if they made a mistake:

## Wrap-up and debriefing (5-15 minutes)

Walkthrough comments and questions from participant

Observations of the note taker:

How’s the type size for you?  
Participant comments:

How did using this ballot compare with the last time you voted?   
Participant comments:

What help do you think that other people might need in using this ballot?   
Participant comments: