



Call Center (TPD) Usability Testing

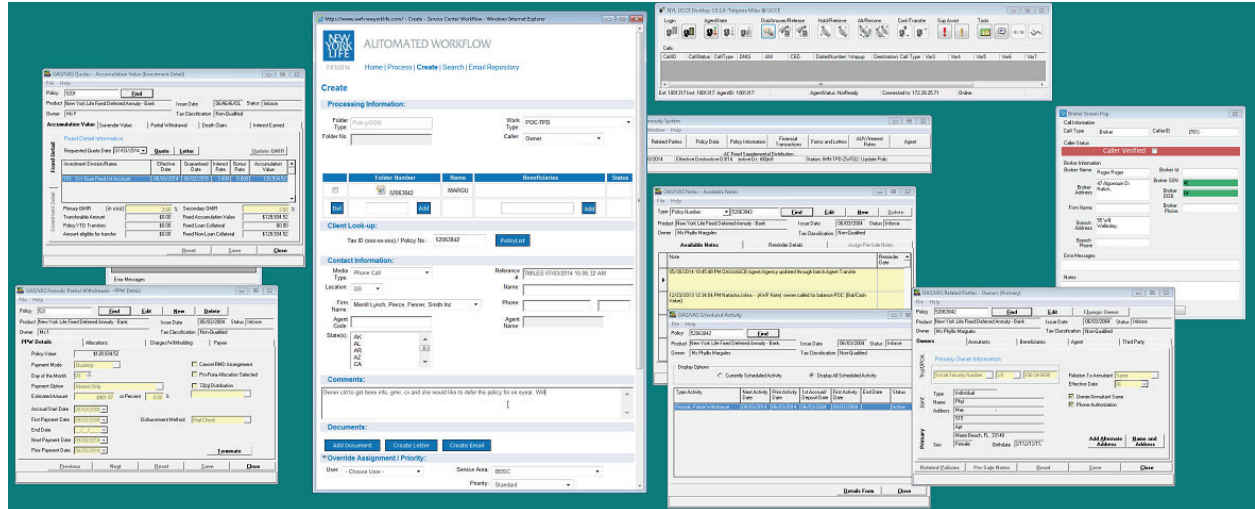
08/21/2014 (v. 02)

In July/August 2014 review of fifteen call center recordings and interviews with four of the call center representatives who participated in the recordings were held in relation to completing transactions destined for the rPay application.

The results of this review were similar to those held for other aspects of transactions through rPay. While the audiences served were different similar themes emerged.

These include:

- Managing the multiple window architecture of current systems vs the single screen architecture of rPay can be challenging for users.
- Integration between AWF and rPay is not optimal, requiring the user to transfer work-product from one application to another manually.
- Deficiencies and mistrust of the system leads to users keeping handwritten notes and cheat sheets to complete daily work.



Shown is an example of the application windows generally open by the analyst.

Below are the observations recorded during the sessions:

Severity: Bug (AWF)	In the AWF application, selecting the “Choose Action” dropdown is difficult to select and change the value. On initial click it cannot be selected.
Severity: Medium (rPay)	When looking up a policy number the user has no easy way to view other policies for the client, this can only be done by performing a social security number search. It would be preferable to have an easy way to perform this search or list other policy numbers associated with the client for the analyst to click on. This would save time for the analyst.
Severity: Medium (rPay)	Combining notes and history with the verification information in rPay would reduce the need of analysts to switch back and forth when getting up to speed on the state of a policy during phone calls. Currently NYLAPS has multiple windows to accomplish this. rPay, in a single window, has a disadvantage when switching.
Severity: Medium (rPay)	Analysts noted that the screen pop was not consistent when a call is received. Sometimes the information does not populate and customers will question why they are being asked to provide the same information already entered into the system by the caller.
Severity: Medium (rPay)	Analysts wanted an easy way to navigate between the history and the details screens. Currently the analyst must traverse the fly-out navigation to switch, which is not optimal.
Severity : Medium (process)	There is a lot of copy and paste from AWF to rPay for notes. It is preferable for this to happen automatically instead of relying on a manual process.
Severity : Medium (process)	Corporate email has the direct line phone number as part of the signature. Since direct calls are not recorded like the system calls are analysts do not answer unknown calls and (in at least one instance) do not use corporate voicemail. Procedurally, the analysts should be directed to enter the call center number as part of their signature, or be instructed how to switch signatures.
Severity: Low (rpay)	When a policy number is a one-for-one match the analyst would like to be taken directly to the policy instead of the interim screen as is today.

Severity: Request
(process/system)

Request to be able to see a daily (or weekly) history of work completed. Currently analysts will refer back to handwritten notes

Severity: Request
(rPay)

In comparison to other similar systems (outside NYL) it is preferable to highlight verified items on the screen instead of having a separate screen pop with the items.

Severity: Note
(process)

All the analysts visited used a separate pad to record phone call information, most often recording the pertinent information on paper and repeating it back to the caller as they then type it in. This was done for numerous reasons

1. Need to refer back to a policy or a name during the call
2. In case of a system issue they would have enough information to seamlessly get to where they were before the issue occurred
3. As a history of what had been completed during the day.
4. When on a call the analyst is “dinged” for asking for the policy number more than once.

One analyst had a pre-designed sheet with name, policy number and notes section printed on the back of scrap paper.

Severity: Note
(rPay)

Partial notes are saved automatically in rPay. Observed when an analyst needed to abandon a note to view client information and then returns the note is still there.

Severity: Note
(rPay)

Timeout value of rPay does not appear to be sufficient. Instances observed where the analyst’s session timed out and they needed to log in again.

Severity: Note
(policy viewer)

Policy viewer can take a long time to open up policy information. In some instances time to open was clocked at 18 seconds. Analysts get around this by opening other windows, completing other work or preemptively opening the policy viewer.