Guidance for voting system standards

Evaluating election systems for usability and accessibility

Sample forms for   
usability testing

Useful forms for usability testing, contributed by members of the Human Factors Public Working Group. These forms are samples, not required templates.

Updated December 2018

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# Screener

This sample screener is instructions for recruiting participants needed for the usability test required in 8.4-A. It can be modified for other requirements.

Overview

Recruiting for usability testing on: [dates]

Location: [address]

Recruit 10 participants in each of the following categories for 1 hour sessions:

Blind

Low vision

Fine motor (hand) impairment

Recruit 10 participants in each of the following categories for 30 minute sessions:

Bilingual Spanish/English speakers

General population

Information for participants:

Participants are responsible for their own transportation. Parking vouchers will be provided

The location is wheelchair accessible

Participants in the disability groups will receive $150 Visa card

Participants in the general and bilingual groups will receive $75 Visa card

Screener questions

**Screen out anyone who works with a voting system vendor or in an elections office.**

**If identified as blind or low vision, ask:**

1. How do you access printed and online materials? [CHECK ALL THAT APPLY]

Screen reader   
 (JAWS, WindowEyes, VoiceOver) [ ] BLIND GROUP

Braille [ ] BLIND GROUP

Human reader [ ] BLIND GROUP

Electronic books [ ] BLIND GROUP

Large print [ ] LOW VISION GROUP

Other [ ] HOLD

**If identified as having a fine motor disability, ask:**

1. Do you use any of the following computer input devices? [CHECK ALL THAT APPLY]

Mouse, trackball, trackpad or joystick [ ] DO NOT RECRUIT

Keyboard or alternative keyboard [ ]

Dual switches [ ]

Sip-and-puff [ ]

Other [ ] HOLD

**If identified as a Spanish speaker, ask:**

1. Do you read and write in Spanish and understand spoken English?

Yes [ ]

No [ ] DO NOT RECRUIT

**For all**

1. Note gender (DO NOT ASK)  
   Recruit approximately even numbers

Female [ ]

Male [ ]

1. Which of the following includes your age?  
   Recruit approximately even numbers

18 – 21 [ ]

22 to 34 [ ]

35 to 54 [ ]

55 to 69 [ ]

70 or older [ ]

1. What is the highest level of education you have completed?  
   Recruit approximately even numbers

High school [ ]

Some college [ ]

College degree [ ]

Graduate degree [ ]

1. Which best describes your ethnicity?   
   Recruit approximately even numbers

Asian [ ]

African American [ ]

White [ ]

Hispanic [ ]

Other [ ]

1. How many years have you been a voter?  
   Recruit approximately even numbers

Never voted [ ]

1 [ ]

2 - 5 [ ]

6 - 10 [ ]

11 - 20 [ ]

More than 20 [ ]

1. How many local, state or federal elections have you voted in since [2 years]?  
   Recruit approximately even numbers

None [ ]

1 - 2 [ ]

3 - 5 [ ]

More than 6 [ ]   
I am not registered to vote [ ]

1. Which of the following devices do you use? [CHECK ALL THAT APPLY]  
   No quotas – we just want to know

Computer [ ]

iPad or other tablet [ ]

Smartphone [ ]

None of these [ ]

# Check in form

Tip

This form is a list of all the participants with a summary of the demographics from the screener. It’s useful to help you be ready for each person. If you use a professional recruiting company, they will prepare one for you.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Check-in** | **Time** | **First Name** | **Gender-Age**  **Ethnicity** | **Technology used** | **Computer**  **Tablet**  **Smartphone** | **Voting years/ Elections in last 2 years** | **Education** |
|  | 9 am | Chris | M – 62  White | Screen Reader | Computer Tablet | 20+ years  3-5 elections | Postgrad |
|  | 9am | Lisa | F – 25  Hispanic | Spanish | Smartphone | 1-2 years  1 election | High School |
|  | 10 am |  |  |  |  |  |  |
|  | 10 am |  |  |  |  |  |  |
|  | 11am |  |  |  |  |  |  |
|  | 11am |  |  |  |  |  |  |
|  | noon |  |  |  |  |  |  |
|  | noon |  |  |  |  |  |  |
|  | 1pm |  |  |  |  |  |  |
|  | 1pm |  |  |  |  |  |  |

# Consent to Participate

Who Conducts Test This study is being conducted by [test company]. We are working for [manufacturer of the voting system].

Purpose The purpose of this study is to evaluate how easy it is for voters to use a new voting system. By participating in this study, you will help us evaluate whether the voting system is easy to use.

Information Collected We will measure the time it takes for you to vote using a test ballot, the number of errors when the vote is cast, and your satisfaction with the voting system. We will use the data collected from you and other participants to evaluate the voting system.

Confidentiality The data will be used to evaluate the voting system. All of the data will only be identified and linked together by a number, and will not be linked back to an individual in any way.

Potential Risks There are no risks involved in participating in this study, nor are there any immediate benefits. The long-term benefits of this study should be improved voting systems.

Freedom to Withdraw You may stop at any time.

Questions You may ask a question at any time.

Signature

Date

# Sample Moderator Script #1

Thank you for coming today to test our new voting system. We’re going to ask you to use the voting system to make choices on a sample ballot.

You might recognize some of the names on the sample ballot but the candidates are not running for any current elections.

You will decide who you want to vote for. The only thing we ask is that you read and think about who you are voting for, just like you would in a normal election. Remember though, there are no right or wrong candidate selections. We’re testing the voting system, not who you voted for.

I‘ll stand in the background and make some notes.

There’s no right or wrong way to use the voting system. We really want to see if voters like you can easily use it. Let me know if you get stuck or have a question.

*[ Help with accommodations as necessary… ]*

The process of voting starts with [ describe poll worker actions ]. Then you will see voting instructions.

Please read the instructions, configure the system if you want, and select the “Next” button.

This will bring up the sample ballot. At that point, you can make your selections.

When you’re done, you will review and save your selections, then print your ballot. T

hen you’ll come here, and scan your ballot.

Do you have any questions before we get started?

# Sample Moderator Script #2

Voting Instructions for first system

Hi, my name is [xxx] and I work for a research company called [ name ]. We are testing 2 voting systems and want to get your feedback.

We’ve set up a mock election, using fake names for candidates.

Normally in an election, there would be poll workers to check you in and answer any questions you have. Think of me as a poll worker. If you get stuck, you can ask me a question and I’ll try to answer it.

*As needed for disability groups…*

First let’s get you set up so you can read the ballot.

Help with accommodation.

The voting process starts with [ describe poll worker actions ]. Then there is a page of voting instructions you can read if you want.

Do you have any questions?

*Scan barcode and start timer.*

Voting Instructions for second system

Great. Now you’re going to vote in another election using a different voting machine.

For U.S. Senate, vote for: Freddy Heineken

For State Representative, vote for: Diana Prince

For Sheriff, write in a vote for: John Doe

For County Committeeman, vote for: Everett Giles and David Halloran

For Fire Chief: do not cast a vote

For Dog Catcher, vote for: Peter Pike, Jack Craig, and   
 Oliver Cromwell

For Judicial Retentions: Vote to keep Joel Goodsen in office   
 Vote to not keep Charlie Babbitt in office

For Proposed Constitutional Amendment H: Vote for this amendment

For Ballot Measure 101: Vote against this measure

For Ballot Measure 106: Vote for this measure

# Data Collection Form

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Participant # | First Name | Group | Moderator | Date/Time |
|  |  |  |  |  |

|  |
| --- |
| Set up and orientation  Note any special setup needed or questions asked |
|  |

|  |  |  |
| --- | --- | --- |
| Task 1: Marking the ballot  Time this task from [ ballot activation ] to [ signal that marking is complete ] | | |
| Errors note type or source and severity | [##] |  |
| Assists note type of assist |  |  |
| Quotes |  |  |
| [Notes on contest or section of ballot] |  |  |
| [Notes on contest or section of ballot] |  |  |

|  |  |  |
| --- | --- | --- |
| Task 2: Verifying and Casting the ballot  Time this task from [ signal that marking is complete ] to [ ballot cast ] | | |
| Errors note type or source and severity | [##] |  |
| Assists note type of assist |  |  |
| Quotes |  |  |
| [Notes on task activity, such as printing ballot] |  |  |
| [Notes on task activity, such as scanning ballot] |  |  |