

**QuickBooks Online Edition
Pay Liabilities Workflow
Usability Test Results**

April 2007

Study goals

- Determine which of two Setup Liabilities flows is preferred by existing QBOE users
- Gather the 2nd round of feedback on the Payroll Liabilities flow
- Gather 1st round of feedback about the combined file and pay flow

Methodology

- April 4 & 5, 2007
- Six 60 minute sessions
- One-on-one in person sessions at Intuit User Research Labs
- Each participant used interactive prototypes for the Setup, Pay Liabilities and File & Pay Together workflows
- Order of Setup prototypes varied across subjects

Participants

Name	Current QB Version	Current Payroll	Number of Employees
Dan	QBOE	QBOE	1
Bill	QBOE	QBOE	10
Minda	QBOE	Checkmate (used Peachtree before)	6
Chris	QBOE	QBOE	5
Jeff	QBOE	Paycycle	4
David	QBOE	QBOE	3

ACE Organization

Accuracy ("It is right")

- Task successes
- Top errors

Confidence ("I believe it was done right")

- Expressions of satisfaction
- Statements of what it would take to improve this

Ease ("It was quick and easy to do")

- Efficiency and simplicity of completing the correct workflow
- How much hunting occurred, where people tended to go first, common alternate paths or unnecessary steps

Payment Setup Flow

Findings & Recommendations

Overall Findings

Successes

- Participants chose their preferred flow based on their experience level, which will help us choose a direction to move forward with.
- Participants all found of the existing help links useful in complicated areas (e.g., payment frequency).
- The mechanism for changing payment frequency and payment method was clear.

Challenges

- Some participants have low confidence levels about setting up payments because they're inexperienced.
- Participants wanted more help to explain what each payment group is.
- Editing and organizing payment groups was confusing.

ACE: Findings

Accuracy ("It is right")

- Accuracy was difficult to gauge because people did not have access to help and did not have to choose the correct frequency and payment method
- However, accuracy issues that were observed or reported are noted in discussion of findings

Confidence ("I believe it was done right")

- Gathered confidence rating (1-7) for each flow directly after use
- Average confidence ratings were 4.5 to 4.8 for both flows
- To do better: Move forward with flow A (one at a time), recommend frequency when possible, include help about what each payment group is
- Confidence level is moderate, with subjects stating that their confidence is not 7 because of their inexperience. Inexperienced people would typically have their bookkeeper or accountant complete this setup (then their confidence would be 7).

Ease ("It was quick and easy to do")

- Gathered a single ease rating (1-7) at session end
- Average ease rating of 6.8, very easy to use
- The disparity between the ease of use and confidence ratings reflects that users knew *how* make changes, but they didn't know for sure *what* each payment group is and *what* settings to choose (e.g., payment frequency).

Tax Payment Schedules Overview

The screenshot shows a web application interface for 'Payroll Setup'. At the top, there's a blue header with 'Payroll Setup' and a sub-header 'Payroll Setup Task List' with a checkmark. Below this is a list of 11 tasks, each with a numbered circle icon. The first three tasks are checked: 1 Gather Information, 2 Company Information, and 3 Taxes. Under 'Taxes', there are sub-items: '- Federal Taxes' (checked), '- State and Local Taxes' (checked), and '- Tax Payment Schedules' (highlighted with a yellow bar). The remaining tasks are: 4 Compensation, 5 Other Payments and Deductions (with sub-items: - Insurance, - Retirement, - Miscellaneous, - Liability Payment Schedules), 6 Payroll Schedule, 7 Paid Time Off (with sub-items: - Paid Vacation Time, - Paid Sick Time), 8 Bank Account Setup, 9 Employees, 10 Email Reminders, and 11 Validate Bank Account.

To the right of the task list is a section titled 'Tax Payment Schedules'. It contains the following text and lists:

Tax Payment Schedules

In this section:

- We'll help you set up your scheduled tax payments (one or more taxes that are paid together, at the same time, to the same agency)
- You'll tell us who should receive the payments and how often they should be paid
- You'll tell us how you want the payments to be paid—as a physical check or as an electronic payment (e-payment) made directly from QuickBooks

Information you'll need to have on hand for each scheduled tax payment:

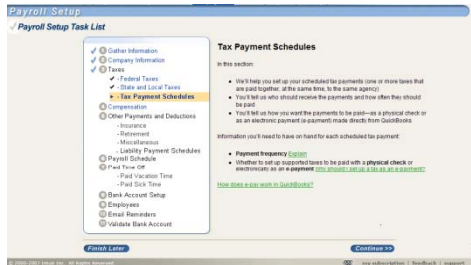
- **Payment frequency** [Explain](#)
- Whether to set up supported taxes to be paid with a **physical check** or electronically as an **e-payment** [Why should I set up a tax as an e-payment?](#)

[How does e-pay work in QuickBooks?](#)

At the bottom of the interface, there are two buttons: 'Finish Later' and 'Continue >>'. The footer contains copyright information: '© 2000-2007 Intuit Inc. All Rights Reserved.' and links for 'my subscription | feedback | support'.

- Both flows started with this Task List page

Tax Payment Schedules Overview: Findings & Recommendations



- Most people said they wouldn't read this info. They may come back to it if they run into problems.
- People said the second section on info they need to have on hand is useful, but that it didn't stand out enough.
Recommendation: Make the header bold. Consider moving this above the first section and/or scaling back the content in the first section.
- People knew what the term “payment frequency” is.

Flows: Description of flows

Flow A (One at a time)

- Pop-ups for setting up each payment
- Summary at the beginning and end of setting up the payments

Flow B (All in one)

- Presents all payments on one page
- All set up is done on one page

Flows Overall Preference: Findings & Recs.

Subject	1st choice	2 nd choice
1	B	A
2	A	B
3	A	B
4	B	A
5	B	A
6	A	B

- 3/6 participants preferred A (One at a time) because setting up each payment step by step with more info is easier and because they won't get lost if they get distracted. They also felt it was more consistent with the rest of Setup.
- 3/6 participants preferred B (All in one) because it was faster and has less redundant information
- Participants that preferred A tended to be less experienced than participants that preferred B.
Separation of payments made 1 participant "feel much more confident. [B] was too much information."
- **Recommendation:** Move forward with Flow A (One at a time) for setup because we are targeting new users. We can consider using Flow B for maintenance. Refine designs based on detailed user test findings.

Flow A (One at a time): List of Payments


Payroll Setup

3 Tax: Set up Payments

The following is a list of your tax payments groups. The next screens will walk you through setting up the payment frequency and method for these groups. Click Continue to get started.

Payment Group	Includes	Payee
CA Personal Income Tax and Disability	CA Personal Income Tax CA State Disability Insurance	EDD
CA Unemployment and Employment Training Tax	CA Unemployment Insurance CA Employment Training Tax	EDD
Federal 941 Payment	Federal Personal Income Tax Social Security Medicare	IRS
Federal 940 FUTA Payment	Federal Unemployment Tax	IRS

[<< Cancel](#) [Continue >>](#)

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- Flow A starts with a list of the tax payment groups.

List of Payments: Findings & Recommendations

Payment Group	Inclusive	Payee
CA Personal Income Tax and Disability	CA Personal Income Tax CA State Disability Insurance	EDD
CA Unemployment and Employment Training Tax	CA Unemployment Insurance CA Employment Training Tax	EDD
Federal 941 Payment	Federal Personal Income Tax Social Security Medicare	RS
Federal 940 FUTA Payment	Federal Unemployment Tax	RS

- People understand what the columns are showing.
- People prefer the full payment names, without acronyms.
- 1 person suggested adding Help information about what each Payment Group is. (e.g., What is CA Personal Income Tax and Disability?)
Recommendation: Consider question mark icons or tooltips.

Set Up Payment

The screenshot shows a web browser window titled 'Untitled Document - Windows Internet Explorer'. The address bar contains the URL: http://www.slicedbreaddesign.com/intuit/quickbooks/qboe/wireframes/setup/round1/setup_scheduled_payment_CAPIT.html. The page title is 'CA Personal Income Tax and State Disability Insurance Payment' and it is 'Page 1 of 4'. The main content area contains the following text and form elements:

Let's start with the first tax payment. The CA PIT Withholding Payment includes Personal Income Tax (PIT) Withholding and State Disability Insurance (SDI). The state of California recommends grouping these taxes together because they are always paid on the same schedule. [Why are these taxes grouped together?](#)

Payment Name CA Personal Income Tax and State Disability

Payee EDD
[How do I change the payee?](#)

Payment method
 Check
[What is e-pay?](#) E-pay

How frequently are you required to pay this payment? Monthly
[How do I know when to pay?](#) Next payment will be due: 4/15/07

Combining payments If this payment is paid at the same time as another payment to the EDD (such as the Unemployment Insurance payment), put them on one check. [Tell me more](#)

At the bottom of the form, there are three buttons: 'Cancel', '< Back', and 'Next >'. The browser's status bar at the bottom shows 'Done', 'Internet', and '100%'.

- Setup Payment dialogs walk the user through setting up one payment at a time.

Set Up Payment: Findings & Recommendations 1



- People that preferred flow A liked that this screen explains more about the payment and felt less cluttered than flow B. Those that preferred flow B felt that this flow has too many steps, though.
- People really liked the green Help links. Everyone noticed them and found them useful.
- Some people would contact their bookkeeper or accountant at this point to get this information, especially the Payment Frequency, or else have the bookkeeper or accountant do the setup for them.
- Everyone was able to change the Payment Frequency and switch between Check and E-pay successfully.

Set Up Payment: Findings & Recommendations 2

- 1 person doesn't want to see Payment Frequencies that aren't allowed. For example, if a payment can only be paid Monthly or Quarterly then don't include Annually.
Recommendation: Intelligently show payment frequencies that are allowed.
- Some people would like for the system to recommend the correct frequency. If the system can't recommend a frequency, then they'd like to go through an interview to determine the correct frequency. If nothing else, they'd look at Help to figure out the correct frequency.
Recommendation: Recommend a frequency, when possible. When it isn't possible, give the user the option to walk through an interview to figure out the correct frequency.
- 1 person said that "Semi-weekly" is confusing. He thinks "semi-" and "bi-" frequencies are confusing.
Recommendation: Update the wording to "Two times/month".

Set Up Payment: Findings & Recommendations 3

- People liked seeing the Next Payment will be due.
- 1 person suggested showing when the next payment(s) are due on a calendar.
Recommendation: Explore showing the next payment circled on a calendar or have a link to a calendar if it doesn't make the screen too cluttered.
- No one wanted the Combining Payments checkbox to be checked by default. Most people would not Combine Payments because they prefer to keep the payments separate for tracking and follow up if there any issues with the agency.
- An earlier version of this screen allowed people to edit the payment group. People found that very confusing, so we removed it after the 1st day of testing.

Set Up Payments Summary


Payroll Setup

3 Tax: Set up Payments

You're done setting up your tax payments! Click on a payment group below to edit the settings.

Payment Group - Click to Edit	Includes	Payee	Frequency	Payment Method
CA Personal Income Tax and Disability	CA Personal Income Tax CA State Disability Insurance	EDD	Monthly	E-pay
CA Unemployment and Employment Training Tax	CA Unemployment Insurance CA Employment Training Tax	EDD	Quarterly	E-pay
Federal 941 Payment	Federal Personal Income Tax Social Security Medicare	IRS	Monthly	Check
Federal 940 FUTA Payment	Federal Unemployment Tax	IRS	Quarterly	Check

[<< Cancel](#) [Continue >>](#)

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- Summary screen shows the frequency and payment method for each payment group.

Set Up Payments Summary: Findings & Recommendations



The screenshot shows a 'Payroll Setup' window with a 'Tax: Set up Payments' section. Below the title, there is a small instruction: 'You're done setting up your tax payments! Click on a payment group below to edit the settings.' A table lists four payment groups with their respective details.

Payment Group	Click to Edit	Includes	Payee	Frequency	Payment Method
CA Personal Income Tax and Disability		CA Personal Income Tax CA State Disability Insurance	EDG	Monthly	E-pay
CA Unemployment and Employment Training Tax		CA Unemployment Insurance CA Employment Training Tax	EDG	Quarterly	E-pay
Federal 341 Payment		Federal Personal Income Tax Social Security Medicare	IRS	Monthly	Check
Federal 342 FUTA Payment		Federal Unemployment Tax	IRS	Quarterly	Check

At the bottom right of the table area, there are two buttons: '<< Cancel' and 'Continue >>'. At the very bottom of the window, there is a small footer: '© 2010-2012 Intuit Inc. All Rights Reserved. mySubscription | Feedback | Support'.

- 2 people expected an Edit button at the end of the line or next to the Payment Group name, instead of the link to edit. They did not like the Click to Edit info text.

Recommendation: Add an Edit button as suggested or use Editing scheme with button at the bottom of the table used elsewhere in Setup.

Flow B (All at once)

Payroll Setup

3 Tax: Set up Payments

The following is a list of tax payment groups we've set up for you. Your tax payments have been put into groups based on what payments government agencies like paid together on the same schedule. Please review the information below and update it to match your set up needs. [How do I know what to enter?](#)

Payment Group Name Why these groups?	Includes Which taxes tare paid together?	Payee Who's the right payee ?	Payment Frequency How do I know when to pay?	Payment Method What's an e-payment?
CA Personal Income Tax and Disability	CA Personal Income Tax CA State Disability Insurance	EDD	Monthly Next due date: April 15	<input checked="" type="radio"/> E-payment <input type="radio"/> Check
CA Unemployment Insurance and Employment Training Tax	CA Unemployment Insurance CA Employment Training Tax	EDD	Quarterly Next due date: April 30	<input checked="" type="radio"/> E-payment <input type="radio"/> Check
Federal 941 Payment	Federal Personal Income Tax Social Security Medicare	IRS	Monthly Next due date: April 15	<input type="radio"/> E-payment <input checked="" type="radio"/> Check
Federal 940 FUTA Payment	Federal Unemployment Tax	IRS	Quarterly (Recommended) Next due date: April 30	<input type="radio"/> E-payment <input checked="" type="radio"/> Check

If a payment is paid at the same time as another payment to the the same payee, put them on one check/e-payment if possible. [Tell me more](#)

[<< Cancel](#) [Continue >>](#)

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- Screen allows users to edit the payee, payment frequency and payment method for all payments all on one page.

Flow B (All at once): Findings & Recommendations 1

Payment Group Name (You select yours)	Includes (What taxes are you paying?)	Payee (Who's the employer?)	Payment Frequency (How often do you pay?)	Payment Method (What's the payment?)
CA Personal Income Tax and Disability	CA Personal Income Tax CA State Disability Insurance	SSS	Monthly Next due date: April 15	<input type="radio"/> E-payment <input type="radio"/> Check
CA Unemployment Insurance and Employment Training Tax	CA Unemployment Insurance CA Employment Training Tax	SSS	Quarterly Next due date: April 30	<input type="radio"/> E-payment <input type="radio"/> Check
Federal 341 Payment	Federal Personal Income Tax Social Security Medicare	IRS	Monthly Next due date: April 15	<input type="radio"/> E-payment <input type="radio"/> Check
Federal 340 FUTA Payment	Federal Unemployment Tax	IRS	Quarterly (Recommended) Next due date: April 30	<input type="radio"/> E-payment <input type="radio"/> Check

If a payment is paid at the same time as another payment to the same payee, put them on one check payment if possible. [Get the rules](#)

[Cancel](#) [Continue](#)

- 3 people (people that preferred flow A) were confused by this screen.
 - Too much information on one screen.
 - Felt more confident filling out payments one at a time.
 - If they get a phone call (lose their focus), they'd lose track of what they have and haven't set up. They'd have to start over again.
- People that preferred flow B like that it is all on one screen - it's "clean," organized and takes fewer steps. They can compare across payments.

Flow B (All at once): Findings & Recommendations 2

- An earlier version of this screen allowed people to Organize the payment groups. People found that very confusing, so we removed it after the 1st day of testing.
- People had many reactions that were similar to flow A's findings (for example, they all noticed and liked the help links, but also want to see help info about each payment group).
Recommendation: Make recommended changes from flow A that are applicable to flow B.

Pay Liabilities Screens

Findings & Recommendations

Overall Findings

Successes

- Overall, we're really on track.
- Resolved almost all issues from Test 1.
- Confidence and ease of use ratings were high, and observed accuracy was high.
- Have a clear understanding of when people expect payments to be in the register.

Challenges

- Unscheduled payments functionality caused confusion.
- Hand writing checks use case caused confusion around "printing" checks.
- Online bill pay and other payment methods other than e-payments and checks need to be considered.

ACE: Findings

Accuracy ("It is right")

- Observed and reported accuracy was high, with any notable exceptions noted in discussion of findings

Confidence ("I believe it was done right")

- Gathered confidence rating (1-7) at end of task 2
- Average confidence rating was 6.4
- To do better: Handle hand writing checks and online bill pay better, clarify Unscheduled Payments
- Confidence in system is high (often 7), with subjects stating that their inexperience is primarily what can be improved

Ease ("It was quick and easy to do")

- Gathered a single ease rating (1-7) at end of task 2
- Average ease rating of 6, generally easy to use - "This is as easy as when my bookkeeper does it."
- Improvement from previous test, up from rating of 5.3
- To do better: Improve non-printed checks use case, would happen naturally with ongoing use

Liability Payments Center

QuickBooks Financial Software

Home Find Help Logout

Company Customers Vendors **Employees** Banking Reports

Liability Payments Center Account: Business Checking Balance : \$23,451.32

Scheduled Payments

<input type="checkbox"/> Send By	Payment	Period	Status	Amount
<input type="checkbox"/> 4/3/07 9 PM PST	CA Personal Income Tax and Disability (EDD)	3/18 - 3/31/07	Due	340.00
<input type="checkbox"/> 4/5/07	Federal 941 (IRS)	3/18 - 3/31/07	Due	500.00
<input type="checkbox"/> 4/27/07 9 PM PST	CA Unemployment Insurance and Employment Training Tax (EDD)	Q1 '07	Upcoming	250.00
<input type="checkbox"/> 4/30/07	Federal 940 FUTA (IRS)	Q1 '07	Upcoming	450.00
Total Selected:				0.00

[Mark as already paid](#) [View/Pay](#)

Unscheduled Payments

Send By	Payment	Amount
Schedule	Aetna Healthcare	400.00
Schedule	Delta Dental	150.00

Recent Payments

Payment Date	Payment	Period	Status	Amount	Confirmation/Check #	Audit Trail
3/18/07	CA Personal Income Tax and Disability (EDD)	3/1 - 3/17/07	Received by Agency	340.00	XCD24567AW	View
2/28/07	Aetna Healthcare	Feb 07	Saved & Printed	500.00	232	----
2/28/07	Delta Dental	2/15 - 2/28/07	Saved Only	450.00	231	----

[View Payment History](#)

Activities

- [Edit payment settings](#)
- [Print liability payment checks](#)
- [Receive liability refund](#)
- [Adjust payroll liabilities](#)

- Liability Payments Center shows scheduled, unscheduled and recent payments and allows users to make payments.

Liability Payments Center: Findings & Recommendations 1

Send By	Payment	Period	Status	Amount
4/3/07 9 PM PST	CA Federal Corporate Tax and California State	3/18 - 3/31/07	Due	282.00
4/3/07	California Sales Tax	3/18 - 3/31/07	Due	300.00
4/3/07 9 PM PST	CA Unemployment Insurance and Employment Training Tax (EDC)	Q3 '07	Upcoming	280.00
4/3/07	California Sales Tax (EST)	Q3 '07	Upcoming	450.00
Total Scheduled:				0.00

Send By	Payment	Amount
Schedule	California Sales Tax	450.00
Schedule	California State	150.00

Payment Date	Payment	Period	Status	Amount	Confirmation/Check #	Audit Trail
3/18/07	CA Federal Corporate Tax and California State	3/1 - 3/17/07	Applied to Agency	340.00	1002489456	0486
2/28/07	California Sales Tax	Feb 07	Scanned & Printed	500.00	213	---
2/28/07	California State	2/15 - 2/28/07	Scanned Only	450.00	211	---

- Overall, all subjects liked the screen and were easily able to pay payments
- 4 people confused about the Unscheduled area. Some thought it includes only non-tax liabilities and some thought the system was detecting past payments and automatically including past agencies here.
Recommendation: See if this is still an issue when users go through the full setup flow, including setting up non-tax liabilities. Consider a different label or help topic if it remains a problem.
- 1 person suggested renaming Scheduled Payments to “To Do”.
Recommendation: Consider changing the name especially if we’re changing Unscheduled Payments, also. Brainstorm ideas for this area as a team.

Liability Payments Center: Findings & Recommendations 2

- Mark As Already Paid was much clearer to users than “Mark As Paid” was in usability test round 1. Some expected it to be a button.
Recommendation: Keep the label as is, but switch it to a button.
- 1 person asked about the due date and suggested adding a Late By or No Later Than date column
Recommendation: Include a help topic on how the Send By date is calculated.
- More successes:
 - People understood the Send By label and the Status states.
 - The Payment and Amount links behave as people expected.
 - People preferred longer payment names without acronyms.
 - Users were able to successfully find More Payment History.
 - Other changes from the first round, such as changing the column order and adding e-payment icons, were all successful.

Review Payments

The screenshot displays the 'Review Payments' screen in QuickBooks. At the top, there are navigation tabs for 'Company', 'Customers', 'Vendors', 'Employees', 'Banking', and 'Reports'. The 'Employees' tab is selected. Below the tabs, the title 'Review Payments: 2 Checks, 2 E-payments' is shown, along with 'Make Payments' and 'Cancel' buttons. The interface is divided into three sections, each representing a different payment:

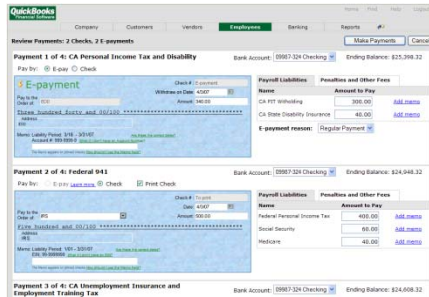
- Payment 1 of 4: CA Personal Income Tax and Disability**
 - Bank Account: 09987-324 Checking | Ending Balance: \$25,398.32
 - Pay by: E-pay Check
 - E-payment** section: Check # : E-payment, Withdraw on Date: 4/3/07, Amount: 340.00. Includes fields for 'Pay to the Order of' (EDD), 'Address' (EDD), and 'Memo' (Liability Period: 3/18 - 3/31/07, Account #: 999-9999-9).
 - Payroll Liabilities** table:

Name	Amount to Pay	
CA PIT Withholding	300.00	Add memo
CA State Disability Insurance	40.00	Add memo
 - E-payment reason:** Regular Payment
- Payment 2 of 4: Federal 941**
 - Bank Account: 09987-324 Checking | Ending Balance: \$24,948.32
 - Pay by: E-pay [Learn more](#) Check Print Check
 - Check** section: Check # : To print, Date: 4/3/07, Amount: 500.00. Includes fields for 'Pay to the Order of' (IRS), 'Address' (IRS), and 'Memo' (Liability Period: 1/01 - 3/31/07, EIN: 99-9999999).
 - Payroll Liabilities** table:

Name	Amount to Pay	
Federal Personal Income Tax	400.00	Add memo
Social Security	60.00	Add memo
Medicare	40.00	Add memo
- Payment 3 of 4: CA Unemployment Insurance and Employment Training Tax**
 - Bank Account: 09987-324 Checking | Ending Balance: \$24,608.32

- Review Payments shows the details for all of the selected payments.

Review Payments: Findings & Recommendations 1



- Most people easily saw that all of the payments are on the screen.
- People found the summary info per payment and the overall summary at the top useful.
- None of the users expected the payments to be in the register at this point.

Review Payments: Findings & Recommendations 2

- 1 person doesn't expect the amount on the check to be editable.
Recommendation: Review how this function works elsewhere in QBOE to insure that editing make sense on this page.
- 2 people asked to see a more detailed breakdown of the Amount.
Recommendation: Include a link to see the detailed breakdown of the Amount.
- Successes:
 - People were able to find and use the Penalties and Other Fees tab successfully .
 - People were able to change the Withdraw On Date successfully .
 - People liked the "Make Payments" label and did not prefer Next or Continue.

Make Payments: E-Payment Screens

Make Payments Step 1: E-payments - Step 2: Checks

Step 1: E-payment 1 of 2 Login

CA Personal Income Tax and Disability

You are submitting this payment **ON TIME** to the EDD for the e-pay cut-off at 9:00 PM PST on 4/3/07.

Agency:	EDD	Withdraw payment on:	4/3/07
Period:	3/18 - 3/31/07	Reason:	Regular payment
Amount:	\$340.00		

To submit your payment to the EDD, enter your User ID, PIN, and email address.

User ID:

PIN:

Confirm PIN:

Email:

Remember my information for next time

I authorize the EDD to deduct \$340.00 from my account.
I also certify that I am legally authorized to enter into this agreement for the above referenced business.

Make Payments Step 1: E-payments - Step 2: Checks

Step 1: E-payment 1 of 2 Confirmation

QuickBooks has received your request for e-payment processing and will submit it to the EDD.

Submitted to Intuit on: 4/3/07
QuickBooks Tracking #: **12349DX**
Payee: EDD
Period: 3/18- 3/31/07
Withdraw on: 3/5/07
Payment: **CA Personal Income Tax and Disability: \$340.00**
- CA - Personal Income Tax (PIT) Withholding: \$300.00
- CA - State Disability Insurance (SDI): \$40.00

Important! You are not finished.

What's Next?

- Within 48 hours, we'll send you an email notification that includes the current status of this e-payment.
- You can also check the status of this e-payment in the Payroll Center. [Show me where](#)

- Step 1: E-Payment screens include Login and Confirmation. They allow the user to submit an e-payment and see the payment confirmation.

E-Payment Screens: Findings & Recommendations

Make Payments Step 1: E-payments - Step 2: Checks

Step 1: E-payment 1 of 2 Login

CA Personal Income Tax and Disability

You are submitting this payment **ON TIME** to the EDO for the e-pay out-off at 9:00 PM PST on 4/3/07.

Agency:	EDO	Withdraw payment on:	4/3/07
Period:	3/18 - 3/31/07	Reason:	Regular payment
Amount:	\$340.00		

To submit your payment to the EDO, enter your User ID, PIN, and email address.

User ID:

PIN:

Confirm PIN:

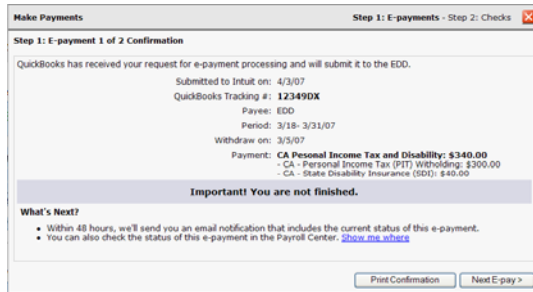
Email:

Remember my information for next time

I authorize the EDO to deduct \$340.00 from my account.
I also certify that I am legally authorized to enter into this agreement for the above referenced business.

- People liked that the Make Payments screens are in a pop-up because the pop-ups overlay the Review screen (screen with the check images). People would drag the pop-up around to refer back to the info below as needed.
- Login
 - Users expected e-payments to be in the register after Submit, but not after Skip.
 - 1 person would never save his login info.
Recommendation: Make the checkbox setting sticky.
 - 1 person expects to see the bank account info here.
Recommendation: Include the bank account.

E-Payment Screens: Findings & Recommendations



- Confirmation

- 1 person disliked "Important! You are not finished." because "not finished" implies he has something to do. He suggested "Payment in process. Notification will be sent when payment complete."

Recommendation: Clarify the wording.

- 1 person said "Important!" didn't stand out and suggested coloring the bar.

Recommendation: In visual design, color the bar.

- 1 person would like to see which bank account the payment was from and their bank account balance after the payment.

Recommendation: Consider showing that info.

Make Payments: Check Payments

Make Payments Step 1: e-payments- **Step 2: Checks** ✕

Step 2: Check Payments

You've created two checks.

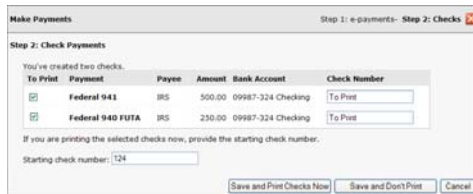
To Print	Payment	Payee	Amount	Bank Account	Check Number
<input checked="" type="checkbox"/>	Federal 941	IRS	500.00	09987-324 Checking	<input type="text" value="To Print"/>
<input checked="" type="checkbox"/>	Federal 940 FUTA	IRS	250.00	09987-324 Checking	<input type="text" value="To Print"/>

If you are printing the selected checks now, provide the starting check number.

Starting check number:

- Step 2: Check Payments allows users to save their check payments and print their checks, if they want to.

Check Payments: Findings & Recommendations



The screenshot shows a window titled 'Make Payments' with a sub-header 'Step 2: Check Payments'. Below the header, it says 'You've created two checks.' and displays a table with the following data:

To Print	Payment	Payee	Amount	Bank Account	Check Number
<input checked="" type="checkbox"/>	Federal 941	IRS	500.00	09987-324 Checking	To Print
<input checked="" type="checkbox"/>	Federal 940 FUTA	IRS	230.00	09987-324 Checking	To Print

Below the table, there is a text input field for 'Starting check number:' with the value '124'. At the bottom, there are three buttons: 'Save and Print Checks Now', 'Save and Don't Print', and 'Cancel'.

- Some people that hand write checks or use online bill pay and never print checks were confused by the wording "Save and Don't Print".
Recommendations:
 - Review the flow considering the hand writing checks and bill pay use cases. What happens when someone never prints a check?
 - Consider adding a third payment option in Review Payments for people that don't pay by e-payment or check - "Other Payment" or "Online Bill Pay, Credit Card and Other".
- 1 person did not want a check number if he chooses not to print that check. If he isn't printing the check right away, he doesn't know what the check number will be.
Recommendation: Consider leaving the Check Number blank if the user unchecks the To Print checkbox.

Check Payments: Findings & Recommendations

- Some people commented that if they weren't printing they'd click Save & Don't Print versus unchecking the To Print checkboxes.
- People expected the checks to be in the register after they click Save.
- 1 person wants to see more info here about whether or not the payment is on time - Send By date or Status.
Recommendation: Consider adding that info.

Summary & Ending Payment Center

QuickBooks Financial Software

Home Find Help Logout

Company Customers Vendors **Employees** Banking Reports

Payroll Liability Summary for 4/3/07

Summary: 2 checks created (\$950.00), 2 e-payments submitted to Intuit(\$590.00)

Pmt Date	Payment	Period	Method	Status	Amount	Check/Tracking #	Audit Trail
4/3/07	CA Personal Income Tax and Disability (EDD)	3/18-3/31/07	E-pay	Submitted to Intuit	\$340.00	12569AT	View
4/3/07	CA Unemployment Insurance and Employment Training Tax (EDD)	Q1 2007	E-pay	Submitted to Intuit	\$250.00	123459DX	View
4/3/07	Federal 941 (IRS)	3/18-3/31/07	Check	To Print	\$500.00	124	-
4/3/07	Federal 940 FUTA (IRS)	Q1 2007	Check	To Print	\$450.00	125	-
Total:					\$1,540.00		

Important! You are not finished.

What's Next?

- Within 48 hours, we'll send you an email notification that includes the current status of these e-payments.
- You should also check the status of these e-payments in the Payroll Center. [Show me where](#)

Print Checks... Print Summary Done

QuickBooks Financial Software

Home Find Help Logout

Company Customers Vendors **Employees** Banking Reports

Liability Payments Center

Account: Business Checking Balance: \$23,451.32

Scheduled Payments

Send by	Payment	Period	Status	Amount
There are currently no scheduled payments with accrued amounts				
Total Selected:				0.00

[Mark as Already Paid](#) [View/Pay](#)

Activities

- [Edit payment settings](#)
- [Print liability payment checks](#)
- [Receive liability refund](#)
- [Adjust payroll liabilities](#)

Unscheduled Payments

Send By	Payment	Amount
Schedule	Aetna Healthcare	400.00
Schedule	Delta Dental	150.00

Recent Payments

Payment Date	Payment	Period	Status	Amount	Confirmation/Check #	Audit Trail
4/3/07	CA Personal Income Tax and Disability (EDD)	3/18 - 3/31/07	Submitted to Intuit	500.00	12569AT	View
4/3/07	CA Unemployment Insurance and Employment Training Tax (EDD)	Q1 2007	Submitted to Intuit	340.00	123459DX	View
4/3/07	Federal 941 (IRS)	3/18 - 3/31/07	Printed	450.00	234	----
4/3/07	Federal 940 FUTA (IRS)	Q1 2007	Printed	250.00	235	----

[View Payment History](#)

Summary & Ending Payment Center: Findings & Recommendations

Print Date	Payment	Period	Method	Status	Amount	Check/Tracking	Audit Trail
4/3/07	CA Personal Income Tax and Disability (SDCL)	3/18 - 3/31/07	E-pay	Submitted to Intuit	\$340.00	1236947	View
4/3/07	CA Unemployment Insurance and Employment Training Tax (UCDT)	Q1 2007	E-pay	Submitted to Intuit	\$250.00	1234950X	View
4/3/07	Federal 941 (941)	3/18 - 3/31/07	Check	To Print	\$500.00	124	---
4/3/07	Federal 942 (FICA (942))	Q1 2007	Check	To Print	\$450.00	123	---
Total:					\$1,540.00		

Payment Date	Payment	Period	Status	Amount	Confirmation/Check #	Audit Trail
4/3/07	CA Personal Income Tax and Disability (SDCL)	3/18 - 3/31/07	Submitted to Intuit	500.00	1236947	View
4/3/07	CA Unemployment Insurance and Employment Training Tax (UCDT)	Q1 2007	Submitted to Intuit	340.00	1234950X	View
4/3/07	Federal 941 (941)	3/18 - 3/31/07	Printed	450.00	234	---
4/3/07	Federal 942 (FICA (942))	Q1 2007	Printed	290.00	239	---

- Summary

- People liked the information on this screen and the changes since Test 1 (more info in columns, column order, etc.).

- 1 person was confused by the "Submitted to Intuit" status.

Recommendation: Consider clarifying this in the What's Next wording below.

- People had the same comments about the "Important! You are not finished." wording and visual design as before.

Recommendation: Make the same changes here.

- People liked the "Done" button label.

- Ending Payment Center

- There were no issues with this screen.

File & Pay Together Screens

Findings & Recommendations

Overall Findings

Successes

- Overall, file & pay together did very well.
- Confidence and ease of use ratings were high, and observed accuracy was high.
- Most of the screens were very clear to people.

Challenges

- People want more information about file & pay together at the beginning of the process.
- How to show Form information on the Summary screen.

ACE: Findings

Accuracy ("It is right")

- Observed and reported accuracy was high, with any notable exceptions noted in discussion of findings

Confidence ("I believe it was done right")

- Gathered confidence rating (1-7) at end of task 3
- Average confidence rating was 5.8
- To do better: Provide more info about the process upfront
- Confidence in system is high (often 6 or 7), with subjects stating that their inexperience is primarily what can be improved

Ease ("It was quick and easy to do")

- Gathered a single ease rating (1-7) at end of task 3
- Average ease rating of 6.8, very easy to use
- To do better: Would happen naturally with ongoing use

Form Interview screen

Make Payments Step 1: E-payments - Step 2: Checks

Step 1: E-payment 1 of 1

This process will walk you through submitting your payments. First, we'll create and send your Florida e-payment along with the related form. Then, we'll print out any checks you've created.

Let's start with the your Florida e-payment...

E-payment Summary: FL Unemployment Insurance (FTB) Payment and Form

You are submitting this ON TIME to the FTB for the e-pay cut-off at 5:00 PM PST on 3/31/07.

Agency:	FTB	Withdraw payment on:	3/31/07
Period:	Q1 '07	Reason:	Regular payment
Amount:	\$340.00	Form:	UCT6

Form Preparation Questions
To prepare the form that must be submitted with your FL e-payment, please answer the questions below:

If this report is past due, what is the penalty amount? (in dollars) [How do I figure out how much?](#)

If the tax due is not paid by the end of the month following the report quarter, what is the interest due? (in dollars) [How do I figure out how much?](#)

Signature/Contact

Title

Phone

To enter a paid preparer's contact information to print on the report, check this box.

- Form Interview screen includes an introduction and the interview for filling out the form that goes with the e-payment.

Form Interview screen: Findings & Recommendations

- Some people expected to see more information on this screen about the file & pay together process. They also said that they'd probably learn more about this in Setup or if they lived in a state that had file & pay together (like Florida).
Recommendation: Consider adding more info to this screen. If it gets too busy, split it into two steps. Or show an intro screen the first time the user files & pays together which introduces the concept.
- 1 person expected the interview fields to be intelligently pre-populated with information. For example, if the form is late insert the penalty amount automatically. Also didn't expect to see the question if it doesn't apply - if the form isn't late, don't include the question in the interview.
Recommendation: Pre-fill fields when possible. Consider removing fields that don't apply.

Review, Submit & Confirmation Screens

Make Payments Step 1: E-payments - Step 2: Checks

Step 1: E-payment 1 of 1 - Review Form
Review the FL UT6 form which will be submitted with your FL payment below. [What if there are errors?](#)

872202007023000680540318500000000000005

Employer's Quarterly Report INTU UCT-6 R. 01/07
5050 W. Tennessee St., Tallahassee, FL 32399-0180

Employers are required to file quarterly tax/wage reports regardless of employment activity or whether any taxes are due.

Quarter Ending	Due Date	Penalty After Date	Tax Rate	UC Account Number
06/30/2007	07/02/2007	07/31/2007		APPLIED FOR

Employer's Name: Craig's Design & Landscaping
Mailing Address: Craig's Design & Landscaping Services, 2250 Shoreline Dr
City/State/ZIP: Redwood, CA 95058
F.E.I. Number: 11-999990

1 Enter the total number of full-time and part-time covered workers who performed services during or received pay for the period including the 12th of the month.

2 Gross Wages Paid this Quarter 0.00
3 Money Paid This Quarter (Less of \$ 7,000 per Employee This Year) 0.00

1st Month: 0
2nd Month: 0
3rd Month: 0

< Previous Next > Cancel

Make Payments Step 1: E-payments - Step 2: Checks

Step 1: E-payment 1 of 1 - Submit

To submit this payment and form to the FTB, please enter the User ID and the PIN you received from the FTB during the registration process.

User ID:
PIN:
Confirm PIN:
Email:

Remember my information for next time

I authorize the FTB to deduct \$340.00 from my account.
I also certify that I am legally authorized to enter into this agreement for the above referenced business.

Submit E-Payment and Form Skip Cancel

Make Payments Step 1: E-payments - Step 2: Checks

Step 1: E-payment 1 of 1 - Confirmation

QuickBooks has received your request for e-payment and form processing and will submit it to the FTB.

Submitted to Intuit on: 3/31/07
QuickBooks Tracking #: 12569AT
Payee: FTB
Period: Q1 '07
Withdraw on: 3/31/07
Payment: **FL UI (FTB) : \$340.00**
- FL - Unemployment Insurance: \$300.00
- FL - State Surcharge: \$40.00

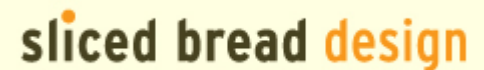
Forms Submitted: **Form UCT6**

Important! You are not finished.

What's Next?

- Within 48 hours, we'll send you an email notification that includes the current status of this e-payment and form submission.
- You should also check the status of this e-payment in the Payroll Center. [Show me where](#)

Print Confirmation Next Check Payments >



Summary Screen

QuickBooks Financial Software

Home Find Help Logout

Company Customers Vendors **Employees** Banking Reports

Payroll Liability Summary for 3/31/07

Summary: 1 checks created (\$250.00), 1 e-payment and form submitted to Intuit(\$340.00), 1 form printed

Payment Date	Payee	Period	Method	Status	Amount	Check/Confirmation No.	Audit Trail
3/31/07	FL UI (FTB) ⚡	Q1 2007	E-pay	Submitted to Intuit	\$340.00	12569AT	View
3/31/07	FL UI FORM ⚡	Q1 2007	E-form	Submitted to Intuit	-----	12569AT	View
3/31/07	Federal 940 FUTA (IRS)	Q1 2007	Check	Printed	\$250.00	124	----
Total:					\$590.00		

Important! You are not finished.

What's Next?

- Within 48 hours, we'll send you an email notification that includes the current status of these e-payments.
- You should also check the status of these e-payments in the Payroll Center. [Show me where](#)
- Keep in mind that processing times for e-payments vary for each agency; some agencies process e-payments immediately, while others can take up to 48 hours or longer.

Reprint Checks Print Summary Done

- Summary screen shows information about the forms and payments that were submitted, saved and printed.

Summary Screen: Findings & Recommendations

QuickBooks
Payroll Liability Summary for 3/31/07

Summary: 3 checks created (\$230.00), 1 e-payment and form submitted to Intuit (\$140.00), 1 form printed

Payment Date	Form	Period	Method	Status	Amount	Check/Confirmation No.	Audit Trail
3/31/07	FL102308	Q1 2007	E-pay	Submitted to Intuit	\$340.00	1230887	View
3/31/07	FL102309	Q1 2007	E-Form	Submitted to Intuit	—	1230887	View
3/31/07	Payroll 060 (FL104 100)	Q1 2007	Check	Printed	\$250.00	124	View
Total:					\$590.00		

Important! You are not finished.

What's Next?

- Within 48 hours, we'll send you an email notification that includes the current status of these e-payments.
- You should also check the status of these e-payments in the Payroll Center. [View the status](#)
- Keep in mind that processing times for e-payments vary for each agency: some agencies process e-payments immediately, while others can take up to 48 hours or longer.

[Print Checks](#) [Print Summary](#) [Close](#)

- People saw all of the info they expected to see here.
- Everyone noticed the form. Some people had questions about whether or not it needs its own line in the Summary table.
Recommendation: Consider adding the Form link the e-payment row - to the Audit Trail or Confirmation column or to a new Form column. Review pros and cons of each option.