

Sample Usability Testing Intake Form

This is a sample intake tool for performing usability tests with library patrons. If you like, you can convert this to a Google Form or Survey Monkey tool. Please feel free to adapt this form to suit your organization's needs.

As you observe them performing tasks on the site, it's important that you intervene as little as possible. While it's tempting to jump in and guide the patron through the task, seeing the places where they get stuck is even more valuable information. Be sure to let them know that there are no right or wrong answers, and take note of their responses.

This survey lists up to 5 tasks, that mirror many common uses of a library website. You can test the patron's experience on any number of these, depending on time or the patron's willingness to participate. Each task shouldn't take more than a couple of minutes, but if you get an inkling that they're itching to finish, feel free to wrap things up at any time.

Demographic Information:

Age (circle one)

12 or younger 13-18 19-29 30-44 45-64 65+

Gender:

Female Male Other

Education Level (select highest level completed):

Up to high school High School Diploma/GED Some College/Technical School
Associate's Technical Degree Undergraduate Degree Graduate/Postgrad Degree

Total Adults in Household (18 or older):

Total Children (17 or younger) in Household:

Device Use

What is your primary device for accessing the Internet?

Desktop/Laptop Computer Tablet Phone Other:

Do you use assistive technology to browse the web?

If yes, list it here.

Do you ever use the library website?

Yes No

Most-used websites

What websites do you visit on a regular basis? Please list up to 5.

Why do you visit the library?

Usability tests:

Use the blank task sheets to collect the usability test information. You can do up to 5 for each patron, depending on time and the patron's willingness to participate. Don't overstay your welcome.

Wrap-up:

Collect this information after you've conducted the usability test(s).

May we follow up at a later date?

If yes:

Name:

Contact information (phone or email):

CLP Staff Notes

Be sure to thank the patron for their time. This last part can be done after the patron leaves.

Additional Notes/Comments:

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If you wish to test multiple tasks, you can print out multiple copies of this sheet and attach it to a single demographic form.

Select a task (circle one)

- How do you find the latest book from (select an author)?
- How do you find out what's going on at the (select a library location) this Saturday?
- How do I volunteer to help out at the library?
- What time does the library close on Thursdays?
- How can I find book recommendations for a 3rd grader?
- How do I log on to the Morningstar financial database?
- How can I find out what digital magazines you offer?
- How do I find out if the Library is hiring?
- How do I donate money to the organization?
- When are my items due?
- How do I contact a librarian?
- How can I get on a computer?
- How do I get help with homework?
- How do I get a library card?
- Is The Hunger Games available as an eBook?

For the circled task:

Have you performed this task on the website before?

Yes

No

Task Notes:

List the user steps here. Be sure to mention the spots where the patron got stuck or their demeanor changed during the process.

User Comments:

Write down any comments or feedback the user offers about the process.