Financial Aid Website Redesign
A User-Centered Approach
Quick Look

Participants

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prospective Students</td>
<td>53%</td>
</tr>
<tr>
<td>Current Students</td>
<td>17%</td>
</tr>
<tr>
<td>Transfer Students</td>
<td>15%</td>
</tr>
<tr>
<td>Freshman Students</td>
<td>12%</td>
</tr>
<tr>
<td>Other Participants</td>
<td>3%</td>
</tr>
</tbody>
</table>

Are students finding what they need?

- Yes: 68%
- No: 31%
- Other: 1%

Original vs. New Navigation

- 84% Success: New Navigation
- 59% Success: Original Navigation

Most Clicked Links

- Find scholarships for Entering Freshman Students: 4,946 clicks
- Find & Apply for Freshman Scholarships (Main Nav): 4,332 clicks
- Find scholarships for Entering Freshman Students (scholarship page): 3,605 clicks
- Scholarships (Main Nav Dropdown): 3,508 clicks
- President's Scholarship: 3,375 clicks

What aren't they finding?

- Scholarships: 42%
- Forms: 12%
- Other: 10%
- Index Chart: 9%
- Loans: 8%
- Contact: 8%
- FAFSA: 6%
- Cost: 4%

What navigation is better, audience-based or task-based?

- Audience-Based Navigation: 18%
- Task-Based Navigation: 82%

Can students find what they need in the new design?

- 91% Home Page Success
- 88% Scholarship Page Success
- 87% Grants & Loans Page Success

Final Recommendations

- Adding a contact form, contact info or a live chat box to each page is highly recommended.
- Keep Forms and Policies under “Resources”.
- Have clear instructions on how to apply for each scholarship. Whether that is a button, a list, or a clear “How to Apply” heading with information.
- Place FAFSA in the top navigation under “Types of Aid” separately from Grants & Loans.
Who participated in these studies?

The main users of the financial aid website are those considering applying, those who have applied and those who are currently Freshmen. The following are those who participated in these studies. It is important that they aligned with the website’s user base.

- **Prospective Students**: 53%
- **Current Students**: 17%
- **Transfer Students**: 15%
- **Freshman Students**: 12%
- **Other**: 3% (Employees, Parents, etc.)
Who is the audience and where are they clicking?

To answer this question Google Analytics Event Tracking was added. Event tracking counts how many times users click on links and buttons on the website.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Link Description</th>
<th>Visits (Unique)</th>
<th>% of Traffic</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Find scholarships for Entering Freshman Students</td>
<td>4,946</td>
<td>2.12%</td>
</tr>
<tr>
<td>2</td>
<td>FIND &amp; APPLY FOR FRESHMAN SCHOLARSHIPS</td>
<td>4,332</td>
<td>1.86%</td>
</tr>
<tr>
<td>3</td>
<td>Find scholarships for Entering Freshman Students</td>
<td><a href="https://financialaid.utah.edu/scholarships/freshman.php">https://financialaid.utah.edu/scholarships/freshman.php</a></td>
<td>3,605</td>
</tr>
<tr>
<td>4</td>
<td>Scholarships</td>
<td>3,508</td>
<td>1.51%</td>
</tr>
<tr>
<td>5</td>
<td>President's Scholarship</td>
<td>3,375</td>
<td>1.45%</td>
</tr>
<tr>
<td>6</td>
<td>FIND &amp; APPLY FOR FRESHMAN SCHOLARSHIPS</td>
<td><a href="https://financialaid.utah.edu/scholarships/freshman-general-scholarships.php">https://financialaid.utah.edu/scholarships/freshman-general-scholarships.php</a></td>
<td>3,366</td>
</tr>
<tr>
<td>7</td>
<td>SCHOLARSHIPS</td>
<td>3,357</td>
<td>1.44%</td>
</tr>
<tr>
<td>8</td>
<td>2017 Summer Financial Aid Application</td>
<td><a href="https://financialaid.utah.edu/forms/Summer%20Application%202017.pdf">https://financialaid.utah.edu/forms/Summer%20Application%202017.pdf</a></td>
<td>3,264</td>
</tr>
<tr>
<td>9</td>
<td>FIND SCHOLARSHIPS THROUGH CAMPUS DEPARTMENTS</td>
<td>2,773</td>
<td>1.19%</td>
</tr>
<tr>
<td>10</td>
<td>Scholarships</td>
<td><a href="https://financialaid.utah.edu/scholarships/">https://financialaid.utah.edu/scholarships/</a></td>
<td>2,658</td>
</tr>
<tr>
<td>11</td>
<td>(not set) Checklist Button</td>
<td>2,175</td>
<td>0.93%</td>
</tr>
<tr>
<td>12</td>
<td>FIND SCHOLARSHIPS THROUGH CAMPUS DEPARTMENTS</td>
<td><a href="https://financialaid.utah.edu/scholarships/campus-resources.php">https://financialaid.utah.edu/scholarships/campus-resources.php</a></td>
<td>1,988</td>
</tr>
<tr>
<td>13</td>
<td>GRANTS &amp; LOANS</td>
<td>1,871</td>
<td>0.80%</td>
</tr>
<tr>
<td>14</td>
<td>Find scholarships for Current Students</td>
<td>1,870</td>
<td>0.80%</td>
</tr>
<tr>
<td>15</td>
<td>Freshman Students</td>
<td>1,798</td>
<td>0.77%</td>
</tr>
<tr>
<td>16</td>
<td>Freshman Students</td>
<td><a href="https://financialaid.utah.edu/scholarships/freshman.php">https://financialaid.utah.edu/scholarships/freshman.php</a></td>
<td>1,746</td>
</tr>
<tr>
<td>17</td>
<td>2017-18 Verification Forms - Dependent</td>
<td><a href="https://financialaid.utah.edu/forms/#collapse-3">https://financialaid.utah.edu/forms/#collapse-3</a></td>
<td>1,711</td>
</tr>
<tr>
<td>18</td>
<td>Utah Flagship Scholarship</td>
<td>1,640</td>
<td>0.70%</td>
</tr>
<tr>
<td>19</td>
<td>Freshman Scholarship Checklist</td>
<td>1,590</td>
<td>0.68%</td>
</tr>
<tr>
<td>20</td>
<td>ABOUT</td>
<td>1,504</td>
<td>0.65%</td>
</tr>
</tbody>
</table>

Scholarship pages are the most common pages users click on. Specifically Freshman scholarship pages. Prospective and Freshman students are the top users of this website.

The most recent data seen in the thumbnail below can be found on a Tableau Dashboard [link](https://tabdev.dashboard.utah.edu/t/uss-dev/views/Book1/FinancialAidWebsite?embed=y&showShareOptions=true&:display_count=no&:showVizHome=no).
What aren’t students finding on the website and what are they looking for?

To answer this question a mini interview in the form of a pop-up was created.

The pop-up got around 1,000 responses in 1 week. 68% of those who answered the pop-up indicated they did find what they were looking for. This is not a bad metric, but it indicates there is room for improvement. The information gathered from the pop-up was used as a starting point for further studies.

What the users indicated they couldn’t find

<table>
<thead>
<tr>
<th>Scholarship</th>
<th>42%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forms</td>
<td>12%</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
</tr>
<tr>
<td>Index Chart</td>
<td>9%</td>
</tr>
<tr>
<td>Loans</td>
<td>8%</td>
</tr>
<tr>
<td>Contact</td>
<td>8%</td>
</tr>
<tr>
<td>FAFSA</td>
<td>6%</td>
</tr>
<tr>
<td>Cost</td>
<td>4%</td>
</tr>
</tbody>
</table>

There is a pattern between this data and that from Google analytics.

Focus should be on improving the website in these two areas.

**Scholarships**
- Presidents Scholarship
- How to Apply, Not Just Information
- Departmental Scholarships
- Housing Scholarships
- Where to go to see my letter
- etc.

**Forms**
- 4065
- FERPA
- Correction Form
- Estimation of Need Petition Form
- FAFSA/FinAid Verification Form
- etc.

**Other**
- Appealment
- Communication Disorder Program
- Difference between a tuition discount and waiver
- Establishing Utah Residency
- Federal School Code
- etc.
Audience-Based vs. Task-Based Navigation

Which is better?

Research conducted on the Financial Aid websites of other universities (including the University of Michigan) guided the creation of a usability test that helped determine which navigation type would work best.

Task-Based Navigation

Types of Aid
- Scholarships
- Grants & Loans
- Work Study

Apply for Aid
- Scholarships
- Grants & Loans

Maintaining Aid
- Deferment & Leave of Absence
- Disbursement of Funds
- Counseling
- Appeals
- Eligibility

Tuition & Fees
- Cost of Attendance
- Cost Calculator
- Tuition Waivers

Audience-Based Navigation

Prospective Students
- Scholarships
- Grants & Loans
- Eligibility
- Counseling

Freshmen Students
- Scholarships
- Grants & Loans
- Eligibility
- Counseling

Transfer Students
- Scholarships
- Grants & Loans
- Eligibility
- Counseling

Current Students
- Scholarships
- Grants & Loans
- Eligibility
- Counseling

Students were prompted with a series of questions including, “Where would you go to find out more information about scholarships available to you?”. The results indicated that students chose and found success with a task-based navigation 82% of the time.

Based on the data, a task-based navigation is recommended.
How does the new navigation compare to the original and how successful is it?

With proven success for task-based navigation, additional usability tests were created to further refine and improve the original navigation using a task-based focus. Success = >75%

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Where would you go to find out more information about what scholarships are available to you?</td>
<td>100%</td>
<td>100%</td>
<td>85%</td>
<td>100%</td>
</tr>
<tr>
<td>Where would you go to contact someone for help with applying for loans?</td>
<td>9%</td>
<td>0%</td>
<td>38%</td>
<td>50%</td>
</tr>
<tr>
<td>Where would you go to figure out how much attending the University of Utah would cost you?</td>
<td>100%</td>
<td>100%</td>
<td>92%</td>
<td>100%</td>
</tr>
<tr>
<td>Where would you go to find financial aid that is available to you?</td>
<td>64%</td>
<td>90%</td>
<td>85%</td>
<td>79%</td>
</tr>
<tr>
<td>Where would you go to find more information about FAFSA?</td>
<td>18%</td>
<td>70%</td>
<td>54%</td>
<td>93%</td>
</tr>
<tr>
<td>Let's say for some reason you had to leave school for a year and wanted to make sure your financial aid would still be available for the following year. Where would you go to obtain that information?</td>
<td>64%</td>
<td>90%</td>
<td>92%</td>
<td>79%</td>
</tr>
</tbody>
</table>

Questions and Changes Made During the Course of These Studies

**Which is better “Types of Aid”, “Apply for Aid” or both.**

Based on the results of the tasks, it was determined that a navigation with both “Types of Aid” and “Apply for Aid” was redundant and potentially confusing to the student. A majority of student participants clicked “Types of Aid” for most tasks. An additional test, with “Apply for Aid” removed showed a similar success rate.

**Do students know how to contact someone for help with Financial Aid?**

There was a consistent pattern throughout all 4 tests for students to look for contact information in the body of the webpage and not the main navigation. We recommend a consistent form or chat feature on each page to accommodate this trend.

**Can students find information about FAFSA?**

The high school student demographic had a tough time recognizing FAFSA as Grants & Loans. As a result, FAFSA was added to the main navigation under “Types of Aid”.

**Can students find the forms and policies they need?**

Since students experienced difficulties when locating Forms and Policies using the original navigation, they were moved to a new area called “Resources.” Further tests indicated the move improved the findability of these items. Considering the importance of forms expressed during preliminary testing, a highly visible link was also added to the content of the home page.

**Can students find scholarships and cost of attendance?**

These continued to be successful over all 4 tests. Although students could find scholarships, some had concerns about knowing how to actually apply for those scholarships or find ones that actually pertain to them.
How successful are the new designs?

After completing thorough testing of the navigation, focus was shifted towards testing the construction and design of the content on several key pages.

Home Page Failed Task and Recommendations

**Task:** Where would you go to contact someone for help applying for loans?

- **Desktop:**
  - 83% Success
  - 27% Failed

- **Mobile:**
  - 60% Success
  - 40% Failed

This task failed on mobile. This was an expected result considering the results of previous navigation tests. Results showed 50-60% of mobile users do not use the main navigation to find contact information.

**Critical Recommendation:** A contact form that is consistent on all pages. A chat feature is also a possible solution to this problem.

Grants & Loans Page Failed Task and Recommendations

**Task:** Where would you go to find out more information about work-study?

- **Desktop:**
  - 50% Success
  - 50% Failed

- **Mobile:**
  - 91% Success
  - 9% Failed

This task failed on larger devices. Students coming to this page may not have realized work-study is a type of financial aid. Those looking for it in particular will likely be more knowledgeable about what it is.

**Low Impact Suggestions:** Using “Work-Study” instead of “Working Through College” as a heading would help.

Also, if work-study is a part of the checklist adding it to the “Resources” section is recommended.

Scholarships Page Failed Task and Recommendations

**Task:** Where on this page would you go to find step-by-step instructions on how to find financial aid?

- **Desktop:**
  - 67% Success
  - 33% Failed

- **Mobile:**
  - 87% Success
  - 13% Failed

Students did not expect to find a step-by-step walkthrough on the scholarships page.

**Low Impact Suggestion:** The checklist should be added to “Resources” in the main navigation.
## How successful are the new designs?

Successful tasks for each page are listed below.

### Home Page

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Mobile Success</th>
<th>Desktop Success</th>
</tr>
</thead>
<tbody>
<tr>
<td>Where would you go to find what scholarships are available to you?</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Where would you go to find out how much tuition costs at the University of Utah?</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Where would you go to find more information about FAFSA?</td>
<td>100%</td>
<td>83%</td>
</tr>
<tr>
<td>Where on this page would you click to find upcoming scholarship deadlines?</td>
<td>80%</td>
<td>83%</td>
</tr>
<tr>
<td>Where would you go to find a Study Abroad Enrollment Verification form?</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

### Grants & Loans Page

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Mobile Success</th>
<th>Desktop Success</th>
</tr>
</thead>
<tbody>
<tr>
<td>Where would you go to find out if you are eligible for Federal Financial Aid?</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Where would you go to find out what you need to do after you apply for grants and/or loans?</td>
<td>87%</td>
<td>100%</td>
</tr>
</tbody>
</table>

### Scholarships Page

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Mobile Success</th>
<th>Desktop Success</th>
</tr>
</thead>
<tbody>
<tr>
<td>Where on this page would you go to find a list of scholarships available on other websites?</td>
<td>87%</td>
<td>100%</td>
</tr>
<tr>
<td>Where on this page would you go to find scholarships that better fit where you are in school?</td>
<td>96%</td>
<td>83%</td>
</tr>
</tbody>
</table>
Feedback From Students Prior to Redesign

• “The website is a bit confusing, and although the resources are typically there, it takes quite a bit of time an digging. It would be nice to have a clear area with very detailed instructions about how to verify your FAFSA through the school, as I had to actually go to the admissions office for assistance because it was so confusing on this website. It would also be nice to have a more clear view of merit based and need based scholarships offered by school.”

• “You guys are pretty cool.”

• “Some of the website has been hard to navigate, making it more user friendly would really speed things up.”

• “I have found the U's website overall to be difficult to navigate, especially when it requires a uNID for some things and a separate username for others, and it took me half and hour just to find the housing application.”

• “Some of the options or links seemed redundant when searching for more information on a specific topic but could be found on more than one link. Maybe some of the links could be more specific.”

• “Thank you!”

• “Try to go from very general to specific as possible. For example, if I was looking for anything involving scholarships, grants, loans, I would put that all under financial aid instead of having some of them separated from each other. Also, I suggest having a general policies tab as well as a policy tab for individual sections such as scholarships, tuition, loans, etc. Some of the pages could overlap, but it would help people find things easier I believe. Having FAFSA under policies I thought was out of place. Placing FAFSA as well as loans and scholarships under a general financial aid tab would help.”

• “Naming things are a bit weird. I didn't expect to find FAFSA under policies. I thought it'd be under grants and loans, since that is what it is.”

• “Reduce the amount of pages that have similar information. Finding anything on the U's website is very frustrating and requires a lot of bookmarking because I frequently will have no idea how to get back to a page that had a particular link that the 5 other similar pages didn't have.”

• “Make it more intuitive and cleaner”

• “There is a small problem on your financial aid checklist. If you click to check your financial aid status, instead of displaying the CIS page it should connect to, it says page not found. I don't know if that was a problem with my computer or the system though. I managed to find that page a different way, but it would be helpful if you could fix it if necessary. Thank you.”

• “Honestly, your financial aid site, is a mess, and has fragments scattered everywhere with outdated information literally everywhere across the internet. PLEASE delete pages with incorrect information.”

• “Live chat support on the website could be such a help, and really nice!”

• “I think it should be simple friendly user. I'm not afraid of computers but you provide too many links and all I want is to get to the application fill it out and submit. And to read the policies after. To read a policy it will take a week of reading. Specially a School or Government policy.”

• “I found a bit of difficulty navigating towards which option to choose. Personally I am having some trouble applying for scholarships through the university because there is no “apply” button where each scholarship opportunity is shown, but other than that, the other questions were much easier.”

• “Some things were harder to find than others, but overall it was easily navigated.”