Housing application form: user experience (UX) principles and recommendations

Details	Description
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This document includes a statement, UX principles, recommendations for the updated housing application form, implications for complimentary processes/project phases, and resources for the service teams.	

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Statement

In November 2022 there were more than 19,000 people on the housing register. 1500 service users were successfully housed in 2021.

Most users complete a lengthy application for housing with little chance of being housed. We believe this:

- costs service users time
- leads to unrealistic expectations and frustration
- uses budget and resources to process applications from users who do not meet criteria for the highest housing need

In our research and information gathering many users said they want us to 'be more direct and honest' up front.

We believe that time-wasting could be reduced, and expectations could be managed, by increased transparency from us before and during the application process. We should be clearer about the range of different housing options and the individual likelihood of being housed. This could lead to fewer applications being submitted and more realistic expectations for those who do submit applications.

This will not help to house more people, however fewer applications would require less council resources, speeding up the assessment of high needs applications and increasing our ability to assist with high needs bids.

Principles

For consistency and quality assurance of our forms and advice and guidance, the project team working on content and form (re)design (or development) must include our UX and/or content designers. Contact Amy McGuire for UX. Contact Tony Pitt for content.

Guidelines for how to approach the revision of the application form and process:

- **Understand users and their needs**
  Continually identify user needs and look at the full end-to-end-user journey, especially in initial phases of work.
- **Actively manage users' expectations**
  Be clear, transparent, and proactive with information, advice and guidance, so users know what to expect and do not have false hopes.
- **Make sure everyone can use the service**
  Make sure the product and service are intuitive and as fully accessible to all users as possible. Ensure a consistent experience across digital and non-digital channels.
- **Provide a joined-up experience**

Design end-to-end services based first on what users need to achieve, not by perceived service limitations. Refine to ensure cohesion between the two.

- **Be consistent/work in a way that is familiar**
  Use plain English. Follow our common design patterns for:
  - formulating questions and answers
  - writing a service guide
  - providing alternative means of contact

All form components, design and content must use our public Design System and follow the communications style guide in the Source.

- **No dead ends**
  For every scenario of "unhappy path", provide guidance for users who can't progress with their application, so they know what alternatives there are (alt service, contact etc.)
- **Keep people informed and in control**
  Provide regular updates about the progress of users' applications and cases at every step.
- **Ask only for information needed to provide the service**
  Do not ask for information which isn't required to provide a service or assess the application. Use a **question protocol** to consider what is either essential information to deliver the service or a 'should have', which allows us to run the service efficiently. Identify and justify anything else that's not necessary or has a secondary purpose. Explain why we're asking for any sensitive or unexpected information.
- **Ask only once**
  Avoid asking for data in application forms which is already in the system.
- **Regularly review advice and guidance**
  Have a service owner who monitors changes within a service and requests content changes when policy changes or user feedback suggests something in current guidance isn't clear.
- **Test changes with users**
  Continually listen to user feedback. When improving content or a form, and before launching it, run a user testing session to validate assumptions and iterate when needed.
- **Keep everyone informed**
  Consider use cases for advocates, such as professionals and carers. Allow for communication to be sent to more than one channel/email address, so that if reports are made on behalf of a user, both the user and advisor are up to date with the case.

Recommendations

Improvements that could be made.

Recommendations are based on the analysis of:

- BCC HomeChoice Review Journey Workshops research
- Previous engagement reports
- Shelter Technical Commentary March 2020
- Analysis of content on the BCC website
- Analysis of content on the HomeChoice website
- User feedback
- Engagement with a service team
- Current housing application form
- Current housing related guidance on the BCC website

Application form

General application

Problems: Users complain that the form is long, uses difficult language, they do not always know what the question is about, and they are asked to provide the same information more than once, or read a question which is not relevant to their situation.

Recommendations:

- Consolidate information to a single "before you start" page with the most important information about the application and a list of documents helpful for completing the form. Follow advice from GOV.UK for how to help users to start using a service.
- Rewrite the form using only concise Plain English, avoiding jargon.
    - Start the form by establishing user circumstances and housing needs, suggest services related to their circumstances. If they wish to continue with the application, use conditional logic to determine what questions they need to answer (especially when already a council tenant, living in care etc.)
- Remove duplication. Ask for information only once.
- Simplify and reorder questions into blocks to logically follow themes.
- Move **pre-qualification** to the beginning of the form so users know if it is worth continuing. If ineligible, describe what the user can do next to avoid any dead ends.
- Use conditional logic to reduce cognitive load and display only questions relevant to the user.
    - run workshops with the service teams to identify all conditional paths.
- Provide an option to include additional contact details for an advocate.
- Consider if word/character limits are necessary. If so, state why we're setting a limit and use a character or word count component to help users.
- Provide a task list screen with section completion status
    - Allow sections to be filled independently, so users can add information in a non-linear order.
    - Provide autosave.

- When a decision about banding is shared, describe clearly how the decision was made, how and when to report a change of circumstances, and how they can appeal if they wish.
- Test the form with users as early as possible, even if it's just one section.
- Consider if the user needs to sign in before starting to fill in the form. If they are not eligible, they shouldn't need to create an account just to find that out.

Health section

Problems: Users share a lot of health information that is not relevant to how we assess their housing need. This can be sensitive data and can result in a longer assessment time. Assumption: health data quality submitted by users varies. There can be too little, too much, or inconsistent levels of detail.

Recommendations:

- Review the health form using the question protocol exercise with service and design teams.
- Make it clear who should – and should not – fill in the health section.
- Add "before you start" section with an introduction to the form (or section) including:
    - its purpose
    - documents which may help users when filling in the form (such as GP details)
    - documents which may be needed to support the application (such as an occupational health assessment)
- Explain that we only need information about conditions that either:
    - are affected by housing
    - will affect the type of housing required

General content and UX

- Do user research to more fully understand how users without English with a first language and accessibility needs can use the processes and how we could improve this if needed. Include research about assistive overlays such as ReachDeck.
- Mark clearly all mandatory fields.
- Provide informative error messages (what's wrong, what's missing, what should be done to progress, or what is the alternative action).
- Add hint text, depending on the situation, describing:
    - what kind of information we expect to get
    - what key terms mean (like homeless, council tenant etc)
    - why we're asking for certain information
- Keep regular contact:
    - on submission, provide a clear confirmation page and a communication using their preferred contact channel (email/letter/SMS) confirming we've received the application and explaining when they will hear about the decision. Include any change of circumstances process.
    - if there's a delay, provide prompt updates.

Related processes

Changes for overlapping processes, such as information and guidance and communications, to support the longer-term recommendations for the application process.

Information and guidance - approach phase

Problems: Users only spend 40 seconds reading the guide how to apply for council and social housing. Content on the HomeChoice is disjointed and out of date.

Hypothesis: We hypothesise that some of the key messages around likelihood of being housed and alternative options are lost.

Recommendations:

- Review the guide to apply for council and social housing. Content is hidden within tabbed pages and may need more detail. It also doesn't match the HomeChoice information, and the CTA is on the second tab, disincentivising the user from reading subsequent information.
- Supplement the recommended updates to the service guide with:
    - the reasons which make some users eligible and ineligible for the social housing (to know eligibility rules as early as possible) with guidance what they can do now and if their circumstances change
    - step-by-step phases of the application process
    - explanation of what banding is and how it is assigned
    - description of what kind of responsibilities users will have once their bid is accepted and will sign a tenancy agreement
- Include data about availability, locations, style of housing, frequency of allocations. Consider linking to more detailed live data at Open Data Bristol if this is available.
- Design appropriate information architecture (for example, some content on the current HomeChoice website is hidden within FAQs and subpages)

Communication

Problems: users often call to chase up applications or with general enquiries. The customer experience is inconsistent, with response emails varying depending on the mailbox or method of contact.

Recommendations:

- Provide updates visible in real time on the tenant portal followed by an automated email, informing the user of what has changed and why. Make sure that notification emails have detailed information about the change, so users don't have to log in to the portal to see what has changed.
- Let the user know what timeline and channels communication will occur on ("how will I find out my result?")

- Set alerts for automatic notifications/follow ups if service can't complete the request within given SLA (to avoid chasing the case over the phone)
- Use auto-response on all mailboxes used for contact to acknowledge receipt and manage expectations for the next step.
- consider Gov Notify as a standardised approach for communications. It can be used standalone or integrated with back-end systems.

Additional recommendations

- If a band has particularly low, or specific, prospects of housing we should make that clear. For example, Band 4 currently has more realistic chances for 50+ or Supported Housing for Older People. Keep this updated if and when the situation changes.
- The new system should provide different journeys for new applicants or current council tenants. Where possible, we should use data we already hold within the system to identify need and suggest relevant services (such as when we already know a user is one of our tenants) (under GDPR for public task/legitimate interest – get confirmation from data protection team that consent exists for data to be shared between service boundaries within our housing system). Users expect this and don't tend to distinguish between service areas in the same way we do internally.

Data

Record base metrics for data which will help us to benchmark and see if the new form is performing better:

- Application wait time (counted from submission date to the notification about the decision)
- Form completion time (from starting the application to submitting it)
- Number of forms started but not completed (for last 12 months)
- Number of applications in each band (can be used to determine success in future as goal would be to reduce proportion that are band 4)
- Call reason and volume (to determine if changes change this)
- Number of forms completed that required additional information (user had to be contacted for more information before the band assignment decision)
- Number of all the people currently on the registry (split into active, inactive)
- Number of allocations in last 12 months (split by month)
- Number of empty council houses (which couldn't be allocated due to its condition) for last 12 months

Support options finder

Problem: Not all housing applicants will be eligible for housing. A lot of people might be eligible but unlikely to get the option of council housing soon.

Hypothesis: It is valuable to direct these users to alternative sources of support and information. People are drawn to the apply for a council house process without considering the other options. Information could be filtered by users' current circumstances to give tailored information.

Recommendation: complete a discovery phase in relation to a triage / signposting tool / single point of entry for all housing services to ensure no dead ends. Any tool or documentation must involve input from various service teams and voluntary organisations to ensure all user journeys are accounted for. The new system offers this functionality, but cross council collaboration will be beneficial to ensure it is comprehensive and a joined-up experience.

The tool could signpost users to **relevant services** they may need depending on their circumstances (such as help with debts, benefits, social housing, council tax rebate etc.). They won't need to search for information on the website page by page but will be provided with information relevant to their needs.

Example: [Housing options finder | Housing.vic.gov.au]

Single point of entry for all housing services

Problem: There's a lot of distinct processes related to housing need.
Hypothesis: It can be confusing for users to find the service or process they need and have a disjointed experience.
Recommendation:
Complete a discovery phase in relation to a single point of entry / to streamline the user experience of the housing portal, particularly for ad-hoc or irregular users of the platform.

Appendix

Resources

Document links for service teams.

Design and style

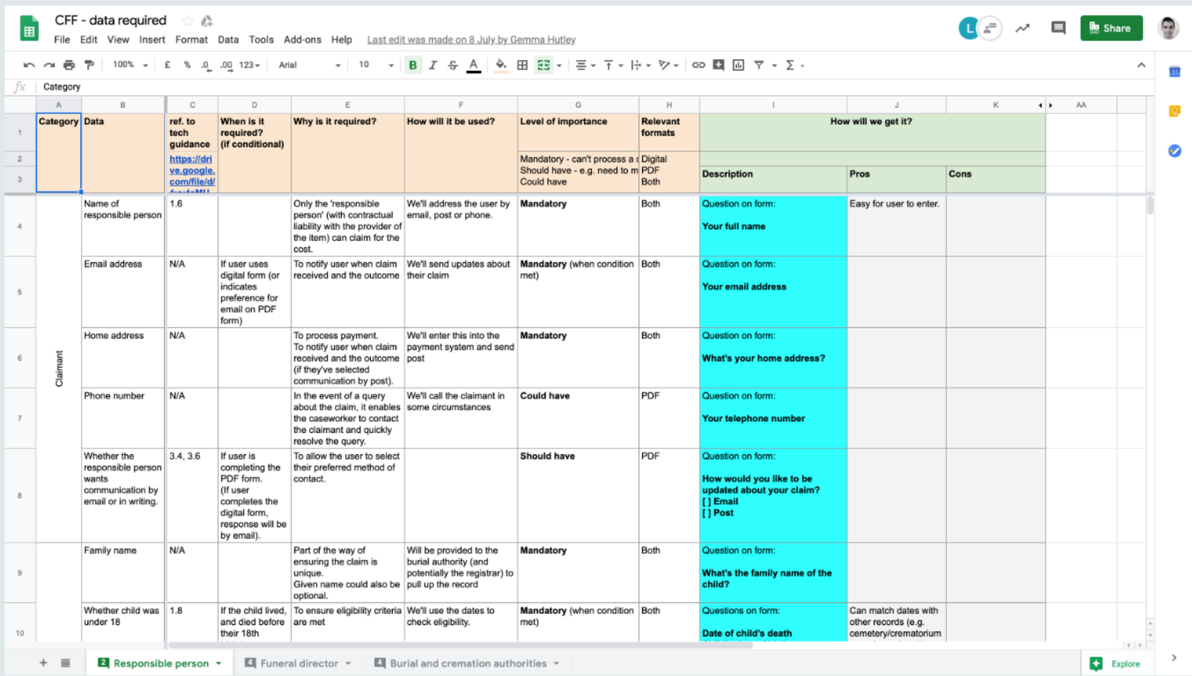
- BCC [Design System (bristol.gov.uk)]
- [Communications style guide (sharepoint.com)]

Housing artefacts

- [Housing application journey - Service blueprint AS-IS.pdf]
- [Housing application journey - Housing application to-be (digital journey happy path).pdf]
- [Principles for housing services.docx]
- [Miro board with all information (request access)]

Question Protocol map

- Read about the [question protocol] exercise
- Speak to the Product and UX team in digital delivery for a template or workshop


CFF - data required

File Edit View Insert Format Data Tools Add-ons Help Last edit was made on 8 July by Gemma Hutley

Category	Data	ref. to tech guidance	When is it required? (if conditional)	Why is it required?	How will it be used?	Level of importance	Relevant formats	How will we get it? Description	Pros	Cons
		https://drive.google.com/file/d/				Mandatory - can't process a / Should have - e.g. need to m / Could have	Digital / PDF / Both			
Claimant	Name of responsible person	1.6		Only the 'responsible person' (with contractual liability with the provider of the item) can claim for the cost.	We'll address the user by email, post or phone.	**Mandatory**	Both	Question on form: **Your full name**	Easy for user to enter.	
	Email address	N/A	If user uses digital form (or indicates preference for email on PDF form)	To notify user when claim received and the outcome	We'll send updates about their claim	**Mandatory** (when condition met)	Both	Question on form: **Your email address**		
	Home address	N/A		To process payment. To notify user when claim received and the outcome (if they've selected communication by post).	We'll enter this into the payment system and send post	**Mandatory**	Both	Question on form: **What's your home address?**		
	Phone number	N/A		In the event of a query about the claim, it enables the caseworker to contact the claimant and quickly resolve the query.	We'll call the claimant in some circumstances	**Could have**	PDF	Question on form: **Your telephone number**		
	Whether the responsible person wants communication by email or in writing.	3.4, 3.6	If user is completing the PDF form. (If user completes the digital form, response will be by email).	To allow the user to select their preferred method of contact.		**Should have**	PDF	Question on form: **How would you like to be updated about your claim? [] Email [] Post**		
	Family name	N/A		Part of the way of ensuring the claim is unique. Given name could also be optional.	Will be provided to the burial authority (and potentially the registrar) to pull up the record	**Mandatory**	Both	Question on form: **What's the family name of the child?**		
	Whether child was under 18	1.8	If the child lived, and died before their 18th	To ensure eligibility criteria are met	We'll use the dates to check eligibility.	**Mandatory** (when condition met)	Both	Questions on form: **Date of child's death**	Can match dates with other records (e.g. cemetery/crematorium	

Responsible person | Funeral director | Burial and cremation authorities

Question protocol map using Google Sheets.

Task lists

- How to create [task list pages – GOV.UK Design System]

Signposting routes

- [Housing application journey - branch out triage.pdf]