

## Pre-Pull Request (PR) for Provide Help

If you have sections or tables that aren't in this template, please add them at the end or where it makes sense. For example, if you also created a list of functional needs, you can insert that list after the User Needs section or you can paste in the table you created with user needs and tests. The objective is to capture all your information in a way that can be moved into Github.

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**Unrelated user need:** Restricted hours (such as business hours) need to be posted with a conversation to local time.

Outcome Short Name: Contextual help

Outcome Description: Provides contextual help

Research:

- [Article title] [author(s)][URL] [A few words about what is relevant in the article]

### User Needs & Tests

1. **User Need:** I need help understanding [uncommon] words or phrases, acronyms, and abbreviations.
  - a. **Test:** Is there a mechanism that defines or expands acronyms, etc.
  - b. **Assertion:** Usability test/plain language review to identify confusing words/phrases
2. **User Need:** I need help understanding a control's purpose
  - a. **Test:** Does the control have an in-context explanation?
  - b. **Assertion:** Does the in-context explanation explain the control in plain language?
3. **User Need:** I need help understanding the meaning of symbols in content (ex: keys, legends, required fields indicated by \*, ! to call out important information, etc.)

NOTE: This does not apply to Augmentative and Alternative Communication (AAC) symbols

  - a. **Test:**

Outcome Short Name: Human support (Original)

Outcome Description: Provides Research:

- [Article title] [author(s)][URL] [A few words about what is relevant in the article]
- 


### User Needs & Tests

1. **User Need:** I need to know whether I am interacting with a human or computer
  - a. **Test:** A qualification is present (text and other?) to identify if the provider of help is a human or not. AND
  - b. **Test:** If you ask the interaction method if it is a human or not, it will accurately respond.
2. **User Need:** I need to know how to directly reach a human being.
  - a. **Test:** Does a mechanism exist to contact a human? (Chat, phone number (staffed 24/7), email, phone callback, etc. Phone numbers cannot have voice menu choices before reaching a human).
3. **User Need:** As an individual with a memory impairment, I need to receive human help immediately.
  - a. **Test:** Does a mechanism exist to immediately contact a human? (Chat, phone number (staffed 24/7), email (response in minutes), etc. Phone numbers cannot have voice menu choices before reaching a human).
4. **User Need:** As an individual with a speech or hearing related disability, I need a way to reach human help in multiple ways or using assistive technology. (Could also be in Provides accessible help)
  - a. **Test:** Does human contact help support assistive technologies? AND
  - b. **Test:** Are there multiple ways to reach human help (e.g. phone vs. chat)
5. **User Need:** I need a mechanism for initiating in-page interactive human help while completing a task.
  - a. **Test:** Is an in-page interactive help mechanism available?

Outcome Short Name: Conversational support (Alternative)

Outcome Description: Provides conversational support that allows both text and verbal communication

Research:

- [Article title] [author(s)][URL] [A few words about what is relevant in the article]
-  Provide Human Help [2020-10-08] - Working Document

## User Needs & Tests

1. **User Need:** I need a way to directly reach a human being for support. (Human support)
  - a. **Test:** Does a mechanism exist to contact a human? (Chat, phone number with hours posted, email, phone callback, etc.).
  - b. **Test:** If human support is provided on a limited or delayed basis, are the hours that a human is available for support clearly displayed?
2. **User Need:** I need a way to receive conversational support immediately. (Timely support)
  - a. **Test:** Does a mechanism exist to immediately get support? (Example mechanisms include chat, phone number (staffed 24/7), email (response in minutes), AI chatbot etc.)

3. **User Need:** I need a mechanism for initiating in-page interactive support while completing a task. (Contextual support)
  - a. **Test:** Is an in-page interactive support mechanism available?
4. **User Need:** When getting support, I need to know whether I am interacting with a human or computer. (Known support provider)
  - a. **Test:** A qualification is present (text and other?) to identify if the provider of help is a human or not. AND
  - b. **Test:** If you ask the conversational method if it is a human or not, it will accurately respond.
5. **User Need:** During conversational support, I need to be able to easily switch between verbal and textual input

Outcome Short Name: Support data entry

Outcome Description: Provides support during data entry

Research:

- [Article title] [author(s)][URL] [A few words about what is relevant in the article]

User Needs & Tests

1. **User Need:** I need assistance inputting correct, appropriate, and accurate data
  - a. **Test:** if a word is input with incorrect spelling, the system indicates possible misspellings and suggests alternatives, including correct spelling (like search).
  - b. **Test:** if a synonym for a technical term is used, the system (like a search) recognizes the synonym as equivalent and completes the action (like search).
  - c. **Test:** if an alternative format (example: data format) is used, the system recognizes the equivalent format, and uses it to complete the process.
    - i. If the format can mean 2 different data point (example data formats are different in different countries), the system will request confirmation by the end user using a second way to present the information (example using text instead of just numbers for date formats)
  - d. **Test:** Input is validated and suggestions for corrections are provided.

Outcome Short Name: Support task completion

Outcome Description: Provides support during task completion

Research:

- [Article title] [author(s)][URL] [A few words about what is relevant in the article]

User Needs & Tests

1. **User Need:** I need on-demand, inline help completing forms and steps in a process / I need help with a particular step or section in the content
  - a. **Test:** Does the control have an in-context explanation?
  - b. **Assertion:** Does the in-context explanation explain the control in plain language?
2. **User Need:** I need persistent text instructions to complete a task in a predictable location.
  - a. **Test:** Are the text instructions persistent?
  - b. **Test:** Are the text instructions in a predictable location (either consistent with other screens or consistent with common industry designs)?
3. **User Need:** I need guidance walking through or completing a task
  - a. **Test:** Is a guided mechanism (e.g., wizard) provided for completing a task?
4. **User Need:** I need just-in-time guidance when completing a task
  - a. **Test:** Are responsive prompts provided when completing a task? (prompts)
  - b. **Test:** Is a responsive AI available during task completion? (Ex: After a period of time not selecting Submit, the user is asked Do you want to submit now?)

Outcome Short Name: Task Completion Documentation

Outcome Description: Provides detailed documentation on task completion

Research:

- [Article title] [author(s)][URL] [A few words about what is relevant in the article]

## User Needs & Tests

1. **User Need:** I need help finding a control
  - a. **Test:** Is there documentation explaining locations of controls?
  - b. **Assertions:** Are controls placed consistently across views?
2. **User Need:** I need to reach help documentation that is not isolated in topic to the current page.
  - a. **Test:** help documentation is available for end users through one of the following (more options should be added):
    - i. A link to a “help” landing page, which includes a variety of help documents.
    - ii. A link to a help document, like a frequently asked questions.
    - iii. A link to a contact us page, with a list of possible help sources for different topics.

Outcome Short Name: Help using new interfaces

Outcome Description: Provides help using new or changed interfaces

Research:

- [Article title] [author(s)][URL] [A few words about what is relevant in the article]

## User Needs & Tests

1. **User Need:** (also in Provides detailed documentation): I need help finding a control
  - a. **Test:** Is there documentation explaining locations of controls?
  - b. **Assertions:** Are controls placed consistently across views?
2. **User Need:** I need on-demand help using interfaces that have changed
  - a. **Test:** Does a mechanism exist that is under user control that can explain changes in an interface? “Where did [this feature] go?”
3. **User Need:** As an individual with memory-related or learning disabilities, I need on-demand help using and remembering how to use new interfaces
  - a. **Test:** Do all new interfaces have in-line links to training or how-to support?

Outcome Short Name: Consistent help

Outcome Description: Provides consistent help

Research:

- [Article title] [author(s)][URL] [A few words about what is relevant in the article]

## User Needs & Tests

1. **User Need:** I need help mechanisms to have consistent/predictable visual and programmatic locations
  - a. **Test:** Is the same help mechanism labeled the same everywhere?
  - b. **Test:** For each help mechanism, is it in a consistent location
  - c. **Test:** For each help mechanism, is it in a consistent programmatic location relative to other elements such as regions?
2. **User Need:** I need help mechanisms to use consistent vocabulary
  - a. **Assertion:** An inclusive design process is used to provide consistent help.

Outcome Short Name: Personalizable help

Outcome Description: Provides adaptable/personalizable help

Research:

- [Article title] [author(s)][URL] [A few words about what is relevant in the article]

## User Needs & Tests

1. **User Need:** I need to be able to control how help is presented to me
  - a. **Test:** Does a mechanism exist to change the presentation of help that is under user control?

2. **User Need:** I want a simpler interface when I start and the ability to increase complexity over time. (Out of scope, hopefully covered in other subgroup)
  - a. **Test:** Is there a mechanism to request a simpler interface with the ability to add more features/information?
3. **User Need:** I need a way to personalize my digital helpers (assistants, wizards, etc) to reduce distractions and be most effective
  - a. **Test:** Is there a mechanism to personalize my digital helpers?
  - b. **Assertion:** Are digital helpers designed with user research to give ability for users to reduce distractions and improve personal effectiveness?

Outcome Short Name: Provides programmatic help

Outcome Description: Provides instructions and help that does not rely on sensory characteristics

Research:

- [Article title] [author(s)][URL] [A few words about what is relevant in the article]

User Needs & Tests

1. **User Need:** I need all instructions to not rely on sensory characteristics
  - a. **Test:** Do instructions avoid reliance on sensory characteristics?
2. **User Need:** I need help solutions to work with my assistive technology and accommodations
  - a. **Test:** Verify that captions, ASL with an interpreter, audio, use with screen readers, use with alternative access including voice input works for this solution. This can be with a relay service.

Outcome Short Name: Accessible conversational support (New)

Outcome Description: Provides accessible support

1. **User Need:** As an individual with a speech or hearing related disability, I need a way to reach support in multiple ways or using assistive technology. (Support alternatives)
  - a. **Test:** Do support options support assistive technologies? AND
  - b. **Test:** Are there multiple ways to reach support (e.g. phone vs. chat)
2. **User Need:** As an individual with a memory impairment, I need to receive support in a way that does not require memorization. (Usable support)
  - a. **Test:** Are accessible methods provided for getting support? (Chat, phone number, email (response in minutes), etc. Phone numbers cannot have voice menu choices before reaching a human).

Outcome Short Name: Provides search support

Outcome Description: Provides support during search

Research:

- [Article title] [author(s)][URL] [A few words about what is relevant in the article]

## User Needs & Tests

1. **User Need:** I need quality search results that support plain language, spelling errors, and non-technical jargon.
  - a. **Test:** Does search provide plain language support?
  - b. **Test:** Does search suggest correct spellings or run search with correct spellings?
  - c. **Test:** Does search support non-technical jargon?
2. **User Need:** I need search features to be located in the same place and use the same behaviors
  - a. **Test:** Is search locate in the same place

Outcome Short Name: Provides help understanding data visualizations

Outcome Description: Provides help understanding and using data visualizations/non-text information

Research:

- [Article title] [author(s)][URL] [A few words about what is relevant in the article]

## User Needs & Tests

1. **User Need:** I need to understand the message being conveyed in a data visualization or other non-text information
  - a. **Test:** Does the surrounding content explain why a data visualization is used?
  - b. **Assertion:** Was user research conducted that concluded that the data visualization conveys the intended message?
2. **User Need:** I need to find information in a data visualization to complete a task or answer a question (or in other non-text information)
  - a. **Assertion:** Conduct diverse user testing to see if users can use find information
3. **User Need:** I need to know how to use a data visualization to complete a task or answer a question (or other non-text graphics with interactions)
  - a. **Test:** Are instructions on using the data visualization present?
  - b. **Test:** Is a legend available to interpret a data visualization
4. **User Need:** I need to simplify the information presented in an interactive data visualization (or other non-text information)
  - a. **Test:** Is a mechanism present to simplify the visualization

5. **User Need:** I need persistent figure captions on images and other figures that describes the reason/purpose for their inclusion or provenance
  - a. **Test:** Belongs to another group

Outcome Short Name: Provide a feedback mechanism

Outcome Description: Provide a mechanism for users to give feedback

Research:

- [Article title] [author(s)][URL] [A few words about what is relevant in the article]

User Needs & Tests

1. **User Need:** I need to give feedback easily from every place where I get stuck (example: help I needed was not available or findable by me)
  - a. **Assertion:** Conduct usability test to identify where users get stuck and ensure help is useful in getting unstuck
  - b. **Test:** Is in-line help mechanism available?

**Assertion:** Customer service is trained to track and collect feedback received from users that are stuck.

**Test:** Is there a mechanism to give feedback that there is a problem, for example: a feedback form, customer support chat or phone number?

Outcome Short Name: Provide persistently figure captions

Outcome Description: Provide persistently available visual and programmatic figure captions that indicate the intent of why the figure or image is included.

Research:

- [Article title] [author(s)][URL] [A few words about what is relevant in the article]

User Needs & Tests

1. **User Need:** I need persistent captions (figure captions) on image and other figures (whether textual or non-textual?) information that describes its reason/purpose for being in the content or provenance **Note:** This outcome may overlap with non-visual alternatives, but the alt text is intended to convey the visual information to a person who cannot see it, while a persistent caption is there to describe to everyone the intent of including the figure, by convention
  - a. **Test:** Belongs to another group



## ←— Scratchpad Work —→

# Provide Help Guideline Scratchpad










## Meeting logistics

- Meeting zoom information
- [IRC: #wcag3-provide-help](#)
- [Github page](#)
- [Subgroup participation handbook](#)
- Members: [List current Subgroup members]
- Previous Members: [List previous subgroup members]

## Resources

- Writing for WCAG3
  -  Guideline Writing Process by Maturity Levels - Q1 2023 (Start Here)
  -  Process for Writing Guidelines using Maturity Levels (For more details)
  - [Functional needs document \(FAST\) editor's draft](#)
- Prior work
  - Research
    - No prior WCAG3 research
  - Categorization exercise that may apply to your guideline
    - Table summarizing the categorization results for this guideline

WCAG2 Analysis Doc	SC Name
<a href="#">3.2.6</a>	Consistent Help
<a href="#">3.3.5</a>	Help
3.3.5.b	Site Help
<a href="#">1.3.3</a>	Sensory Characteristics

- [Folder of documents from the Categorization Exercise](#)
  -  Categorization exercise 2 Aug.xlsx – extract of the database from the categorization exercise used to analyze information. It includes all the success criteria, even the ones that do not have an individual document.
  - [Links to relevant content from Making Content Usable](#)
- Other potentially useful research and documents (external to w3c work)
  - [Making Content Usable Provide Help & Support](#)
  - [Cognitive Accessibility Issue Papers](#)
  -  Help – Testing Drafting Space
  -  Findable Help History
  -  Provide Human Help [2020-10-08] – Working Document
  -  Make It Easy to Find Help and Give Feedback
  -  Finding Help – WCAG 2.2
  -  4.3.6 Provide Search .docx
  - Not sure if we want this here, but capturing just in case:
    -  COGA + Silver Help subgroup meeting notes
  -  [Historical] Silver Template: Help
- Phiriapkanon. [Is big button interface enough for elderly users](#), P34, Malardardalen University Press Sweden 2011.

# Schedule for TPAC

Eastern

10:30-11:30 Work

11:30-12:00 Break

12:00-2:00 work

2:00-3:00 Break

3:00-5:00 work

## Scope

Existing guideline text: The web site or app provides help

### Jennie's thoughts from prior COGA work

1. Define help:

- for a specific word (definition), line of text (more context), or interaction
- for a process (like FAQs)
- support (get help from a representative)
- provide feedback because something isn't working well for an end user (this has been part of previous COGA conversations about help)

2. Define help mechanisms (not all work for those who need the help)

- hover text, i for more information
- same page help (example: glossary at bottom of page)
- page with frequently asked questions or support documentation
- search - a type of self-help
- bots (like chat bots)
- contact information (email address, phone number, contact form). Sometimes social media accounts are in this category.

3. Limitations identified regarding help processes often available:

- needing to know where they are (how do I know where to find the help I need?)
- knowing the exact word, phrase, or spelling
- being able to navigate between the task I am trying to complete, finding help, receiving help.

John's thoughts

- **3 categories: Finding, using, and understanding.**

## Types of Help

- Contextual help -
  - a. Word or phrase based - definitions, acronyms, abbreviations, pronunciation, etc.
  - b. Control name - info about icon (title tags, alt text in PDFs that show in hover)

- c. In line help (mechanism based) - information to help users with a step of the process
    - i. help icon in place that provides more information, additive hover information
    - ii. Footnotes and endnotes ?
  - d. Textual instructions - persistent on the page
  - e. Keys/legends ( associating symbols with text equivalence in a page, e.g., required field indicator)
  - f. Figure captions
  - g. Chart (and data visualizations) descriptions, legends, and titles
  - h. Text headings (Note: out of scope for this subgroup)
  - i. Alt text for images (Note: out of scope for this subgroup)
- Prompts and Wizards
  - a. Prompts to help navigating when interfaces change (e.g., [‘walk me’](#), dynamic side panel content)
  - b. Wizards
  - c. Simplified/staged views
  - d. Status messages/notifications (Note: out of scope for this subgroup)
  - e. Digital assistant/helper (e.g., [Microsoft clippy](#), search within a tool that brings you to the feature, like in some Microsoft tools. E.g. I search for how to sort data, and it brings up the choices I can select)
- Human support
  - a. Contact mechanism (chat)
  - b. Contact information (email, phone, etc)
  - c. In person
- Other support
  - a. Documentation (How tos)
  - b. Bots
  - c. Search (note: some searches get scoped on the backend. Example - to a set of pages, to the entire site. These need to be considered)
  - d. Site maps (Note: out of scope)
- Suggestions (identification of errors or problems)
  - a. Spelling and grammar prompts
  - b. Suggestions (replies, navigation, search terms, etc.)
  - c. Autocorrect
- Feedback
- Content transformation
  - a. Replacing text with icons
  - b. Making non-persistent information (info revealed with an i icon, for example) to be displayed at all times
- Consistency (identification, navigation, location)
- Recognizability (something IS a control, etc) (Note: out of scope for this subgroup)
- Error messages and descriptions (Note: out of scope for this subgroup)

- AAC, TTY, TTD, ASL (measures for equal access), out of scope?

Note: Alt text might be considered assistance but we are scoping it as different than help.

## Week 1: Review all research

### Instructions

- Group introductions
- Decided on how minutes will be kept (IRC, running google doc, etc)
- Divide up research locations among team. Completing relevant research list is homework.
- Note: Do not cite WCAG 2.x directly in research. Instead trace guidelines back to the research or guidance that led to the SC.

### Relevant Research

[Article title] [author(s)][URL] [A few words about what is relevant in the article]

## Week 2-3: User Needs

### Instructions

Make a list of the user needs from research. Clearly reference the research. It does not have to be peer-reviewed papers, but should have credibility within the accessibility community. The list needs to include:

- The barriers encountered by people with disabilities
- The common user needs that apply to all the disability groups
- The unique needs (if any) that only apply to a specific group of functional needs.

When a user need is related but not necessarily within scope, note it anyway and add a note, “may be out of scope”

Capture user needs, even when they are not definitely testable. Assertions (using a process to improve accessibility instead of testing a result) are an option.

### User Needs with Referenced Research or Gaps in Research

Guidance for writing user needs

- As a person with [disability], I need help [verb]...
- If generic: I need help [verb]...
- Use verbs understanding, finding, and using

User Need	Related outcome	Research
1. I need help understanding [uncommon] words or phrases, acronyms, and abbreviations.	1	<ul style="list-style-type: none"> <li>[Article title from Relevant research list]</li> </ul>
2. I need help understanding a control's purpose	1	
3. I need help finding a control	6	
4. I need help understanding which are the controls or actions/that something is a control	none	Note: Overlap between affordances and help May be out of scope
5. I need help to be provided consistently	8	
6. I need help completing forms and steps in a process / I need help with a particular step or section in the content	5	
7. I need persistent text instructions to complete a task in a predictable location	5	
8. I need to easily find help at each stage of a multistep/long process (repeated on each step, easily retrievable, etc)	5	
9. I need to be able to control how help is presented to me	9	
10. I need help understanding symbols (not AAC) (ex: keys, legends, required fields indicated by, ! to call	1	

User Need	Related outcome	Research
out important information, etc.)		
11. I need persistent captions (figure captions) on image and other figures (whether textual or non-textual?) information that describes its reason/purpose for being in the content or provenance	14	Note: May overlap with non-visual alternatives, but the alt text is intended to convey the visual information to a person who cannot see it, while a persistent caption is there to describe to everyone the intent of <i>including</i> the figure, by convention
12. I need to understand the message being conveyed in a data visualization	12	Data visualization definition: a visual representation of information intended to increase one's understanding of complex information (such as trends and relationships). Pictures are not normally considered data visualizations, in this context  This is not a visual alternative
13. I need to find information in a data visualization to complete a task or answer a question	12	
14. I need to know how to use a data visualization to complete a task or answer a question	12	Use = Manipulate or interpret
15. I need to simplify the information presented in an interactive data visualization	12	Note: Add the needs around different modalities of data presentation (sonification, tactile presentation, games, etc)
16. I need all help content to not rely on a single sense	10	
17. I need on-demand help using interfaces that have changed	7	

User Need	Related outcome	Research
18. As an individual with memory-related or learning disabilities, I need on-demand help using and remembering how to use new interfaces	7	
<del>19. I want to turn on help on how to use interfaces</del>		this is now redundant with “on demand” in #19
20. I want guidance walking through or completing a task (wizard)	5	
21. I want a simpler interface when I start and the ability to increase complexity over time.	9	
22. I need a way to personalize my digital helpers (assistants, wizards, etc) to reduce distractions and be most effective	9	We had a discussion on the potential value of anthropomorphizing
23. I need to know whether I am interacting with a human or computer	3	
24. I need to know how to directly reach a human being.  <b>Notes:</b> <ul style="list-style-type: none"> <li>• In some cases this may not be possible, in which case we need to define an alternative.</li> <li>• Barriers, such as phone menus, may exist between the web content and reaching the person. How to deal with these?</li> </ul>	3	

User Need	Related outcome	Research
25. As an individual with a memory impairment, I need to receive human help immediately.	3	
26. As an individual with a speech or hearing related disability, I need a way to reach human help in multiple ways or using assistive technology.	3	Note: May be out of scope for W3C
27. I need a mechanism for initiating help	3	
28. I need mechanisms to be consistently identified	8	Potentially globally applicable to contact help.  Note: Location may be difficult to achieve and needs more exploration
29. I need help mechanisms to have consistent visual and programmatic locations		Same as above?
30.	6	Multiple Ways could cover site maps, and site maps are useful for logically chunking information on the site.
<p>31. I need quality search results that support plain language, spelling errors, and non-technical jargon.</p> <p>Other considerations:  - Relevance  - considerations around controlled vocabularies, ontologies, synonym rings, etc</p>	11	<p><b>From Content usable:</b> Provide a friendly search capability. Ideally search should include:</p> <ul style="list-style-type: none"> <li>• autocomplete,</li> <li>• grouping of results when appropriate with headings for each group,</li> <li>• ability to easily find previous searches, and</li> <li>• Spell-checking.</li> </ul>

User Need	Related outcome	Research
		<ul style="list-style-type: none"> <li>Consider scoping of search - prioritizing key results.</li> </ul>
32. I need search features to be located in the same place and use the same behaviors	11	
33. I need assistance inputting correct, appropriate, and accurate data	4	<ul style="list-style-type: none"> <li>Spelling and grammar prompts</li> <li>Suggestions (replies, navigation, search terms, etc.)</li> <li>Autocorrect</li> <li>Autocomplete/autofill</li> </ul>
34. When I enter data or use a control, I receive feedback that I did it successfully or receive an error notification I can understand	NA	Out of scope: Error notifications guideline and whatever Guideline includes 4.1.3
35. I need to get help and give user feedback easily from every place where I get stuck	13	<p>Out of scope - Not sure where it goes. Examples: rate user experience, report issues, etc.</p> <p><a href="https://www.w3.org/TR/coga-usable/#make-it-easy-to-find-help-and-give-feedback-pattern">https://www.w3.org/TR/coga-usable/#make-it-easy-to-find-help-and-give-feedback-pattern</a></p>
36. Help needs to adaptable/personalizable	9	Out of scope? Personalization subgroup?
37. I need help solutions to work with my assistive technology and accommodations	10	
38. I need help to be relevant, written in plain language, and assist me in solving my problems	1	

## Week 4: Tests

### Instructions

- Briefly describe or sketch out the test that would be needed to determine if the user need has been met. This can be a structured (traditional computational or guided) accessibility test, a group of tests, an evaluation (fail, good, excellent) or an assertion. An assertion is a declaration that a process was followed instead of a result was tested.
- Aim for covering the user need not for perfectly written tests
- See [Writing Process Tests](#) for Goals

### List or Table of Tests

1. I need help understanding [uncommon] words or phrases, acronyms, and abbreviations.
  - Test: Is there a mechanism that defines or expands acronyms, etc.
  - Assertion: Usability test/plain language review to identify confusing words/phrases
2. I need help understanding a control's purpose
  - Test: Does the control have an in-context explanation?
  - Assertion: Does the in-context explanation explain the control in plain language?
3. I need help finding a control
  - Test: Is there documentation explaining locations of controls?
  - Assertions: Are controls placed consistently across views?
- ~~4. I need help understanding which are the controls or actions/that something is a control~~
  - ~~○ Assertion: Was inclusive design or user research used to confirm that people with cognitive disabilities can identify the controls?~~
5. I need help to be provided consistently [consistent what? Voice, location, vocabulary?]
  - Assertion: An inclusive design process is used to provide consistent help.
6. I need on-demand, inline help completing forms and steps in a process / I need help with a particular step or section in the content
  - Test: Does the control have an in-context explanation?
  - Assertion: Does the in-context explanation explain the control in plain language?
7. I need persistent text instructions to complete a task.
  - Test: Are the text instructions persistent?
  - Test: Are the text instructions in a predictable location (either consistent with other screens or consistent with common industry designs)?
- ~~8. I need to easily find help at each stage of a multistep/long process (repeated on each step, easily retrievable, etc)~~
  - Test: Are there help instructions for each stage of a multi-step process?
  - Assertion: An inclusive design process is used to provide help for multi-step processes?
9. I need to be able to control how help is presented to me
  - Test: Does a mechanism exist to change the presentation of help that is under user control?

10. I need help understanding non-operable symbols (not AAC) in content (e.g.,: keys, legends, required fields indicated by, ! to call out important information, etc.)
  - Belongs to another group
11. I need persistent figure captions on images and other figures that describe the reason/purpose for their inclusion or provenance [question whether nearby body text is sufficient as a replacement for this]
  - Belongs to another group
12. I need to understand the message being conveyed in a data visualization
  - Test: Does the surrounding content explain why a data visualization is used?
  - Assertion: Was user research conducted that concluded that the data visualization conveys the intended message?
13. I need to find information in a data visualization to complete a task or answer a question
  - Assertion: Conduct diverse user testing to see if users can use find information
14. I need to know how to use a data visualization to complete a task or answer a question
  - Test: Are instructions on using the data visualization present?
  - Test: Is a legend available to interpret a data visualization
15. I need to simplify the information presented in an interactive data visualization
  - Test: Is a mechanism present to simplify the visualization
16. I need all instructions to not rely on sensory characteristics
  - Test: Do instructions avoid reliance on sensory characteristics?
17. I need on-demand help for interfaces that have changed
  - Test: Does a mechanism exist that is under user control that can explain changes in an interface? "Where did [this feature] go?"
18. As an individual with memory-related or learning disabilities, I need on-demand help using and remembering how to use new interfaces
  - Test: Do all new interfaces have in-line links to training or how-to support?
19. I want guidance walking through or completing a task (wizard)
  - Test: Is a walkthrough mechanism provided for a task?
20. I want a simpler interface when I start and the ability to increase complexity over time.
  - Test: Is there a mechanism to request a simpler interface with the ability to add more features/information?
21. I need a way to personalize my digital helpers (assistants, wizards, etc) to reduce distractions and be most effective
  - Test: Is there a mechanism to personalize my digital helpers?
  - Assertion: Are digital helpers designed with user research to give ability for users to reduce distractions and improve personal effectiveness?
22. I need to know whether I am interacting with a human or computer
  - Test: A qualification is present (text and other?) to identify if the provider of help is a human or not.
  - AND
  - Test: If you ask the interaction method if it is a human or not, it will accurately respond.
23. I need to know how to directly reach a human being.

- Test: Does a mechanism exist to contact a human? (Chat, phone number (manned 24/7), email, phone callback, etc. Phone numbers cannot have voice menu choices before reaching a human).
24. As an individual with a memory impairment, I need to receive human help immediately.
- Test: Does a mechanism exist to immediately contact a human? (Chat, phone number (manned 24/7), email (response in minutes), etc. Phone numbers cannot have voice menu choices before reaching a human).
25. As an individual with a speech or hearing related disability, I need a way to reach human help in multiple ways or using assistive technology.
- Test: Does human contact help support assistive technologies? AND
  - Test: Are there multiple ways to reach human help (e.g. phone vs. chat)
26. I need a mechanism for initiating in-page interactive help (chat, etc)
- Test: Is an in-page interactive help mechanism available?
27. I need help mechanisms to be consistently identified
- Test: Is the same help mechanism labeled the same everywhere?
28. I need help mechanisms to have consistent visual and programmatic locations
- Test: For each test mechanism, is it in a consistent location
  - Test: For each test mechanism, is it in a consistent programmatic location relative to other elements such as regions?
29. I need to reach help documentation that is not isolated in topic to the current page. [ this is for help not provided in context of the page and can included site maps]
- Test: help documentation is available for end users through one of the following (more options should be added):
    - A link to a “help” landing page, which includes a variety of help documents.
    - A link to a help document, like a frequently asked questions.
    - A link to a contact us page, with a list of possible help sources for different topics.
30. I need quality search results that support plain language, spelling errors, and non-technical jargon.
- Test: Does search provide plain language support?
  - Test: Does search suggest correct spellings or run search with correct spellings?
  - Test: Does search support non-technical jargon?
31. I need search features to be located in the same place and use the same behaviors
- Test: Is search locate in the same place
32. I need assistance inputting correct, appropriate, and accurate data
- Test: if a word is inputted with incorrect spelling, the system corrects the spelling and uses the corrected spelling to complete the action (like search).
  - Test: if a synonym for a technical term is used, the system (like a search) recognizes the synonym as equivalent and completes the action (like search).
  - Test: if an alternative format (example: data format) is used, the system recognizes the equivalent format, and uses it to complete the process.
    - If the format can mean 2 different data point (example data formats are different in different countries), the system will request confirmation by the

end user using a second way to present the information (example using text instead of just numbers for date formats)

33. I need to get help and give user feedback easily from every place where I get stuck
  - Assertion: Conduct usability test to identify where users get stuck and ensure help is useful in getting unstuck
  - Test: Is in-line help mechanism available?
34. I need help solutions to work with my assistive technology and accommodations
  - Test: verify that captions, ASL with an interpreter, audio, use with screen readers, use with alternative access including voice input works for this solution. This can be with a relay service.
35. I need help to be relevant, written in plain language, and assist me in solving my problems
  - Assertion: User testing was conducted to determine how helpful help is.

## Week 5: Outcomes

### Instructions

- Using the tests list, write plain language outcomes for the user needs. This may mean reworking user needs.

### Outcomes

Note: Possible Guideline level assertion - User testing was conducted to determine that help is relevant, written in plain language, and assists user in solving problems.

1. Outcome: Provides contextual help
  - User Need: I need help understanding [uncommon] words or phrases, acronyms, and abbreviations.
  - User Need: I need help understanding a control's purpose
  - User Need: I need help understanding non-operable symbols (not AAC) in content (ex: keys, legends, required fields indicated by, ! to call out important information, etc.)
2. Outcome: Provides user-controlled prompts and wizards
  - User Need: I need guidance walking through or completing a task
3. Outcome: Provides human support
  - User Need: I need to know whether I am interacting with a human or computer
  - User Need: I need to know how to directly reach a human being.
  - User Need: As an individual with a memory impairment, I need to receive human help immediately.
  - User Need: As an individual with a speech or hearing related disability, I need a way to reach human help in multiple ways or using assistive technology. (Could also be in Provides accessible help)
  - User Need: I need a mechanism for initiating in-page interactive help

4. Outcome: Provides support during data entry
  - User Need: I need assistance inputting correct, ~~appropriate, and accurate~~ data
5. Outcome: Provides support during task completion
  - User Need: I need on-demand, inline help completing forms and steps in a process / I need help with a particular step or section in the content
  - User Need: I need persistent text instructions to complete a task in a predictable location.
  - ~~○ User Need: I need to easily find help at each stage of a multistep/long process (repeated on each step, easily retrievable, etc)~~
  - ~~○ User Need: I need persistent text instructions to complete a task in a predictable location. (Overlaps with Provide Consistent Help below)~~
  - User Need: I want guidance walking through or completing a task (wizard)
6. Outcome: Provides detailed documentation
  - User Need: I need help finding a control
  - User Need: I need to reach help documentation that is not isolated in topic to the current page.
7. Outcome: Provides digital wayfinding/location of items throughout the technology
  - User Need: (also in Provides detailed documentation): I need help finding a control
  - User Need: I need on-demand help using interfaces that have changed
  - User Need: As an individual with memory-related or learning disabilities, I need on-demand help using and remembering how to use new interfaces
8. Outcome: Provides consistent help
  - User Need: I need help to be provided consistently
  - User Need: I need help mechanisms to be consistently identified
  - User Need: I need help mechanisms to have consistent/predictable visual and programmatic locations
  - User Need: I need help to use consistent vocabulary
9. Outcome: Provides adaptable/personalizable help
  - User Need: I need to be able to control how help is presented to me
  - User Need: I want a simpler interface when I start and the ability to increase complexity over time. (Out of scope, hopefully covered in other subgroup)
  - User Need: I need a way to personalize my digital helpers (assistants, wizards, etc) to reduce distractions and be most effective
10. Outcome: Provides accessible help
  - User Need: I need all instructions to not rely on sensory characteristics
  - User Need: I need help solutions to work with my assistive technology and accommodations
11. Outcome: Provides support during search
  - User Need: I need quality search results that support plain language, spelling errors, and non-technical jargon.
  - User Need: I need search features to be located in the same place and use the same behaviors

12. Outcome: Provides help understanding and using data visualizations/non-text information
- User Need: I need to understand the message being conveyed in a data visualization or other non-text information
  - User Need: I need to find information in a data visualization to complete a task or answer a question (or in other non-text information)
  - User Need: I need to know how to use a data visualization to complete a task or answer a question (or other non-text graphics with interactions)
  - User Need: I need to simplify the information presented in an interactive data visualization (or other non-text information)
  - User Need: I need persistent figure captions on images and other figures that describes the reason/purpose for their inclusion or provenance
13. Outcome: Provide a mechanism for users to give feedback
- User Need: I need to give feedback easily from every place where I get stuck (example: help I needed was not available or findable by me)
    - Assertion: Customer service is trained to track and collect feedback received from users that are stuck.
    - Test: Is there a mechanism to give feedback that there is a problem, for example: a feedback form, customer support chat or phone number?
14. Outcome: Provide persistently available visual and programmatic figure captions that indicate the intent of why the figure or image is included.
- User Need: I need persistent captions (figure captions) on image and other figures (whether textual or non-textual?) information that describes its reason/purpose for being in the content or provenance Note: This outcome may overlap with non-visual alternatives, but the alt text is intended to convey the visual information to a person who cannot see it, while a persistent caption is there to describe to everyone the intent of including the figure, by convention

## Week 6-8 Iterate and Write Pull Request

### Instructions

- Revisit research and revise the Guideline(s), User Needs, Outcomes and Tests until you are satisfied with them.
- Remember these are at the exploratory level. They do not need to be perfect, just get us going in the right direction.
- Clearly note where additional research is needed
- Call out which outcomes would be difficult to incorporate in WCAG 2.
- Create a pull request in <https://github.com/w3c/wcag3> with the new content

## Questions/more work

- Map the definitions under Scope against John's taxonomy to see if we have holes
- Further explore the relationship between alt text and help understanding images
- Further explore the continuum between graphics, interactive graphics, and data visualizations
- Add the needs around different modalities of data presentation (sonification, tactile presentation, games, etc)
- Needed research: Is an anthropomorphized digital helper more effective? Aka, Does Clippy/Morris the cat really need to look like that?
- Research needed on effectiveness of AI vs human help (i.e., we want to ensure we do not bias unnecessarily about the future value of non-human AI)
- Research the impact of relay services on getting human help
- Research the effectiveness of different types of support documentation (How Tos, FAQs, Bots, Site Maps, Online forums, Etc). What works and what doesn't?

## Definitions to develop

Support: support is a service provided by the system provider

Help : help is a feature of the system interface. Support being distinctive from help in that help is a feature of the system interface and support is a service provided by the system provider.

## Who will work on the PR?

Name: