Design standards

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This scoping document outlines what we will include in the design standards and guidance document for dashboard providers.

Money & Pensions Service

Design standards and guidance for dashboard providers

1 Introduction

1.1 About the standards

The design standards will ensure that organisations develop dashboards that keep users at their heart. Employing user centred design (UCD) in developing dashboard services ensures that consumers will have a positive user experience, which is efficient and effective.

We will develop the design standards from a thorough service design process. We will identify the user needs and feed the user research into the service design. The standards will be the result of comprehensive iterative testing to ensure that the user needs are met.

The Pensions Dashboards Programme (PDP) product team will develop the standards with input from the Usability Working Group and other external stakeholders.

1.2 Why standards are important

The UCD standards are necessary to:

- build good user experiences

- ensure consistency across dashboards - to maintain confidence in all pensions dashboards, as one bad experience could put people off using other dashboards

- encourage trust in dashboards and the data

- enable a smooth onboarding of dashboard providers

1.3 Dashboard providers user experience (UX) design

1.3.1 User research and UX design

This will include an overview of user research and UX work.

1.3.2 Dashboard providers user research and UX design

Dashboard providers will use the design standards to build their dashboards. Each dashboard project should consider how they will carry out their own user centred design (UCD) activities, including user research, UX design and usability testing.

1.4 Description of the architecture and the process flows

This will include an overview of the architecture.

Details in the appendix

1.5 Other relevant documents

Data usage guide

2 Principles

Developing good dashboards requires the following:

- efficient and effective designs (good usability)
    - simple and easy to use
    - information is easy to understand
    - user needs and goals are met
    - users understand the state of the system eg if their identity has not been verified or not all their pensions are displayed
    - Inclusive design (accessibility)
- consistency across dashboards
- data security
- trust in the service

3 Design standards

What will be included in the standards:

3.1 GDS standards

Relevant items from the design standards

3.2 DWP/HMG standards

How to display data eg null or zero, date formats

Design system

3.3 Accessibility

Web pages must not be discriminatory.

(https://info.webusability.co.uk/blog/what-is-the-law-on-accessibility)

- Equality act 2010
- Public sector legislation (2019)
- accessibility audits

3.4 Layout of the pensions page

How the pensions will be displayed:

- pension order
- partial matches
- found pensions with no view data returned

3.5 Data content on the pensions page

How to display the data on the main pensions page:

- how to display data detailed in the data standards on the dashboard
- which data values to display on the main pensions page
- how to label the data elements
- how to display the data to ensure the user understands it
- how to display total pension values
- how to display State pension details
- the relevant health warnings to display alongside the value information and the extent of reliance

3.6 Data content on the individual pensions page (more details)

How to display data in the more details page for an individual pension:

- which data values to display on the more details page.

- how to display State pension details

3.7 Images, logos and explainer videos

Images, logos and explainer videos must be accessible.

3.8 Data visualisation

Types of data visualisation possible:

- illustrations

- timelines

3.9 Messaging

Messaging around situations where pensions may not be displayed:

- error reporting due to response times – delays from data provider

- partial matching

- staging of data providers

- expired dashboard consents

3.10 Consent and authorisation

How the dashboard will frame and access the consent and authorisation service:

- explanation of the role of the consent and authorisation service including the pension finder service

- pages that may be required before leaving the dashboard and when returning to the dashboard from the consent and authorisation service

3.11 Identity checking

How the dashboard will frame the identity verification process:

- an explanation of the identity verification process to prepare the user for the journey

- handling delays

3.12 Representatives / delegates

Link to the consent and authorisation service to enable delegate access consents:

- framing around redirecting to the C&A service

- where the link will be on the dashboard

Delegate access to dashboards:

- conditional on the dashboard provider building delegate dashboard pages

- selection of consumer pensions to display

3.13 Help pages

Help pages at the dashboard:

- signposting to help

- in line help – question mark links

- help pages layout

- help pages content

- redirecting from help pages to complaints

- signposting to MaPS' triage process (as proposed in draft regulations)

3.14 Onward journeys

Managing the onward journey:

- a one-off consent or every time the user moves from the dashboard to the onward journey

- explanation of effect of moving off dashboard

3.15 Footer content

Definitions of content there will be in the dashboard footer:

- cookie banners and statement

- accessibility statement

- privacy notice (data protection) – How we use your data

3.16 Signposting and other information

- signposting to MaPs for general guidance etc

- presentation of information alongside pensions information

4 Appendix

Documents or links that have determined the standards:

- user research and UX design work – personas, user journeys etc

- architecture and process flows

- reference data for establishing the standards

- research eg Consultation document

- data standards