Notetaker: <u>Leo</u>   Date: <u>03/24/2022</u> Time: <u>10 AM</u>
Participant: <u>Mouli</u>   Organization: <u>Caresource</u>

1. Facilitator Guide

1.1   Introduction

[Start with the first page PDF to be visible on screen.]

Hi my name is _____ with me is _____. First of all, we'd like to thank you for your interest in participating in the Provider App UI evaluation. We are conducting a Usability Session to ensure that the Provider solution we are building will meet your expectations. We need to make sure that this application will work as intended for your use.

Before we go on, I'd like to give you a quick background of this initiative.

[Give a quick recap of this application, why, what and when, and a general overview of the member instance functionality – 5 minutes.]

1.2   Things to Keep in Mind

Today's session will be divided in three parts:

- I will first ask you a few preliminary questions.
- This will be followed by the hands-on exercise of a few scenarios we prepared as I mentioned using our prototype.
- We will then finish with a few feedback and exit questions based on the hands-on portion.

Here are a few things that you should know about your hands-on participation:

1. This is not a test of you; we are testing the application design. So don't worry about making mistakes.

2. There is no right or wrong answer. We are here to observe and validate the user experience in the new design.

3. Likewise please think out loud. We need to hear what you are thinking, why you clicked something, or why there's silence on your end.

We may not be able to offer you any suggestions or hints during the hands on. But if you ever get stuck, please do not hesitate to ask for our help and we will try to get you back on track.

Lastly there might be a few people from the team who would be listening in. They are here to just observe. Any questions so far?

[Get Consent for Recording]

With your permission, we're going to record the computer screen activities and what you have to say. The recordings will be used only to help us figure out how to improve the site, and it won't be seen by anyone except the people working on the project.

Do I have your permission to record? Thank you.

[When permission is given, start the recording]

1.3   Pre-Evaluation Proper

Before we look at the web application, I'd like to ask a few quick questions about you and your work:

Professional Demographics

- Have you participated in evaluation sessions like this before?
  >> No

- Please tell me your name, title and what you do.
  >> My title is senior director all provider management

- How familiar are you with the existing Facility, IPA, Practitioner, Common Practitioner and Provider Group applications?
  >> Knowledgeable of all that

- What are the main reasons you access and use these applications?
  >> We enroll and process the claims so that providers will be paid

- What types of Provider data do you view and/or update? (i.e. pages, sections tabs)
  >> All of that, we add new provider, we do maintain come of provider info on demographic

Computer Expertise

- Do you consider yourself a proficient computer user?
  >> Yes

- Have you used Amazon.com, eBay, or other online shopping services before? How often?
  >> Yes.

- How familiar are you with Facebook, Twitter, LinkedIn, or other social media web applications?
  >> When I get a chance, once a day

Hardware Questions

- What is your company issued machine? PC or MAC? Laptop or desktop?
  >> PC, laptop.

- What is your computer resolution? (To find out, go to your desktop, right click then select Display Settings; scroll down to Resolution).
  >> 1920 x 1080

[Remote Mouse Control and WebEx Navigation Panel Minimization]

We will now move on to the hands on portion, but first let me make sure that you have access to my local environment:

1. I'm going to give you control of the mouse and keyboard.

[Give WebEx mouse and keyboard Control]

2. Please move your mouse around to get used to the lag but do not click anything yet.

3. Please make sure to minimize or shrink the Participants panel on your end as well (click the two arrows pointing to each other).

4. We're ready to start now.

Part I: Hands On (Please read each scenario and questions out loud)

<ins>Intro:</ins>

You are an experienced user in the existing Facility, IPA, Practitioner, Common Practitioner and Provider Group applications and have learned of a new application called Provider. The Provider app has features that will allow you to view provider-centric information.

Using the new Provider design, you will perform scenarios by viewing and answering questions about a Provider.

The Provider application home page has been opened for you. Please read Scenario 1 aloud.

http://pdssp.trizetto.com/sites/pdsfpd/SiteAssets/provider_ux_1/home_provider_test.html

<ins>Scenario 1: Search</ins>

Task 1. Scanning the home page, determine what search options are available to conduct a search?

>> Choose from the drop-down, I can common practitioner or provider, then succeeding drop-downs, then click hit Search icon.

Task 2. Conduct a search using the Provider ID. You have been provided the Provider ID: **CORE**. How many providers were returned in the search results?

>> Easily done

Task 3. Scanning the search results, what is the entity for the Provider ID: **CORE123**?

>> Had to be prompted to find Entity

Task 4: What is Common ID for Provider ID: **COREPR67**?

>> Easily found

CORRECT PATHWAY(S)	SUCCESS (0: Not completed; 1: Completed with difficulty or help 2: Easily completed)	NOTES/OBSERVATIONS (Why was the user successful or not successful, e.g., wrong pathways, confusing page layout, navigation issues, terminology)
Home ➔ Search Result ➔	2	

Scenario II: Summary Page - Header

You have been tasked to answer questions about the Provider with the Provider ID: **CORE**. Determine how to view more information about Provider **CORE**.

>> Did not get the instruction correctly. He had to be prompted that he click the CORE link.

The application has opened on the summary page. Take a moment to scan the page layout, identify some of the fields and sections you see.

Task 1. Focusing on the header of the page, what is the **NPI**?
>> Easily found

Task 2. Does the Provider have a **Secondary Specialty**? If so, what?
>> Easily found

CORRECT PATHWAY(S)	SUCCESS (0: Not completed; 1: Completed with difficulty or help 2: Easily completed)	NOTES/OBSERVATIONS (Why was the user successful or not successful, e.g., wrong pathways, confusing page layout, navigation issues, terminology)
Search Result ➔ Provider Summary Page	2	

Scenario III: Provider Summary – Sections

Task 1. How many tabbed sections do you see? What are they?
>> Easily found

Task 2. Focus on the **Indicative** tab. Locate the **addresses** card. What is the **primary address**? Which **services** are at this address?
>> Found the labels

Task 3. Locate the **Networks** card. How can you view more Network IDs?
>> Had to be prompted to click More

Task 4: There is another feature within the card that will allow you to view more information, scan the card for an option to view more information.
>> Clicked the three dots after much prompting

Task 5: For Network ID: **Platinum Network A** do they auto assign PCPs?
>> Yes. He had to be prompted to go where.

Task 6. Dismiss the dialog.

CORRECT PATHWAY(S)	SUCCESS (0: Not completed; 1: Completed with difficulty or help 2: Easily completed)	NOTES/OBSERVATIONS (Why was the user successful or not successful, e.g., wrong pathways, confusing page layout, navigation issues, terminology)
Provider Summary Page → Network Dialog Box	1	**Requires some prompting to go through the task.** **Typical senior personnel who tests the environment who is not a casual user**

Task 7. Locate the **Relationship** tab. Locate the **Provider Groups** card. Determine which **Provider Group** the facility belongs to. What is the **name**?

>> Easy

Task 8. Locate the **Capitation** tab. Find the **Global Capitation** card. What is the **Relation Type** for the Network ID: **Silver Network**?
>> Yes, C

Task 9: There is another feature within the card that will allow you to view more information, scan the card for an option to view more information.
>> Easy

Task 10: For Network ID: **Silver Network**, what is the **Pool ID?**
>> Easy

Task 11. Dismiss the dialog.

CORRECT PATHWAY(S)	SUCCESS (0: Not completed; 1: Completed with difficulty or help 2: Easily completed)	NOTES/OBSERVATIONS (Why was the user successful or not successful, e.g., wrong pathways, confusing page layout, navigation issues, terminology)
Provider Summary Page → Relationship Tab → Capitation Tab → Global Capitation Dialog	2	

You have answered all the questions needed for Provider: CORE

This concludes the scenarios and tasks for Provider app.

Post Hands-On Questions:

1. What are your initial thoughts on how the application performed for the tasks just completed?
   >> With a little help, being for the first time to use it, it is OK

2. Please describe your experience with identifying provider information.

    a. How did this compare to your current experience with completing the same tasks in the existing classic Facility application?
        >> This one, if we are really looking right now, the info is similar to what we have in Facets now, except a couple of new screens. Similar experience but this is more provider-centric.

    b. Which is easier or harder to use?

3. Do you think the creation and design of an 'Inquiry only' Provider application has benefits to you as a user and your plan? If so, why?
   >> It may not be significant, we can just pull info from the backend right now. If just to query info, this is igs good to see, but we already get this from facets now.

4. What did you like most about this web application?
   >> Easy to use, someone, need to be trained to lessen mistake

5. What, if anything, did you like least about this web application? If there is one thing you could do to improve the user experience, what would it be?
   >> Depends upon who the user is to be, so depends upon who the resource using it

6. Lastly, we'd like you to rate this web application as it is on a scale of 1-10, with 10 being very usable and 1 being not usable at all. How would you rate it?
   >> 7/10. The functionality that I use today since we are being closely monitored – more things to be thought of – credentialing contract, enter a contract with the provider, start to use, then application comes in. The biggest disconnect resided in the environment in multi-application from the market, then transferring from one application to another.
   >> I suggest that it starts with contracting, credentialing, and then the provider's setup for payment. These applications should sync together.

Others:

>> This is the right step to bring this application.

>> Directory maintenance – roadmap? Reach out to us for maintenance management.

Nikhil: Initial goal is whatever we have in Facets to move here. We will also consolidate UIs and make enhancements as needed.