OUR HEALTH

CCSQ WORLD USABILITY DAY

Continual User Participation in Human-Centered Research and Design

November 8, 2022
2:30 pm - 3:15 pm ET

Hyorim Park, Mana Hayashi Tang, Shelagh Cully

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Introducing the speakers

Shelagh Cully *(shay-la)*

Sr. UX Designer
Ventera

ESS Team Lead

Mana Hayashi Tang *(ma-na)*
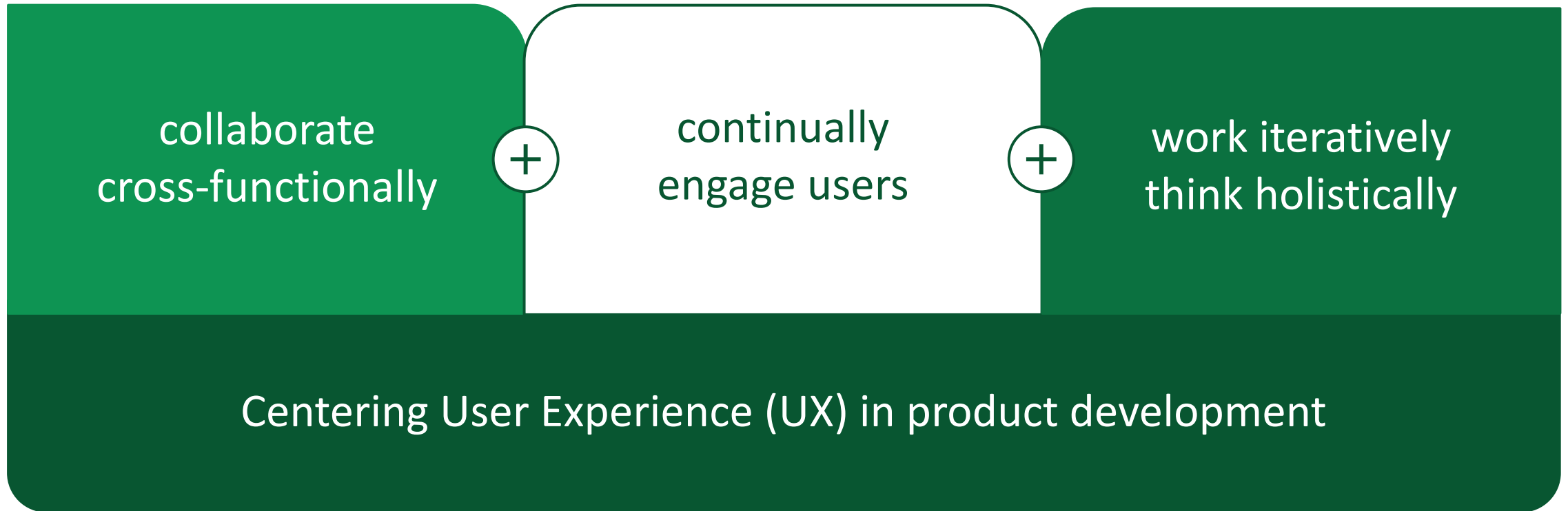
Sr. UX Researcher
Ventera

ESS Team UXR for PRS 2.0

Hyorim Park *(hyo-rim)*

Sr. UX Researcher
Ventera

ESS Team UXR for HARP

ventera

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Human-centered research and design: 3 best practices

collaborate cross-functionally

+

continually engage users

+

work iteratively think holistically

Centering User Experience (UX) in product development

Best practices for human-centered research and design

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Collaborate cross-functionally

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Enterprise Systems and Services (ESS)
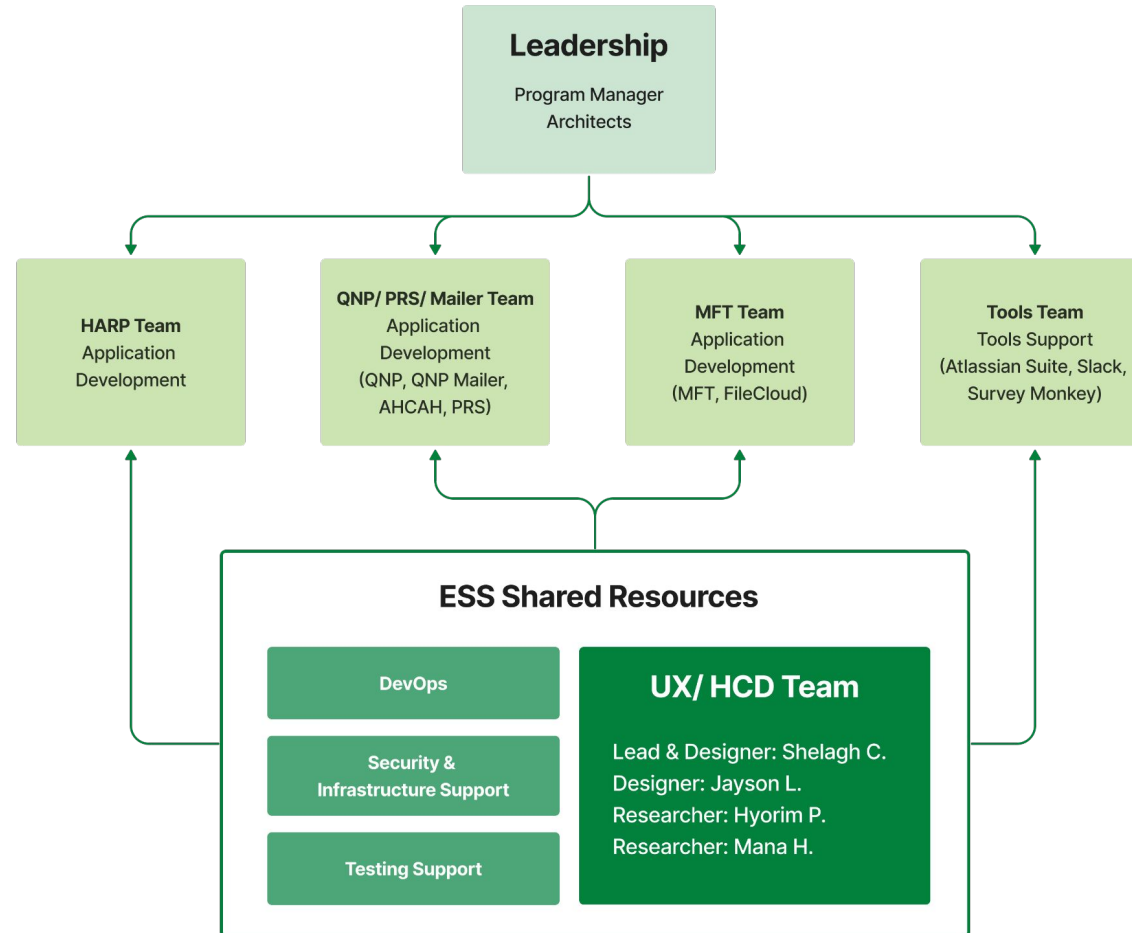
Organizational chart for the ESS Team

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Our cross-functional work process

UX Team identifies a user need → UXR conducts research with project and UX team support → UXD (re)works designs based on user research → UXR tests the new/ updated designs with users → UXD works with development to implement new designs → UXR follows up with users on new design

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Our cross-functional work process cont'd

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Engage users through cross-functional collaboration

User interview

- Lead User Experience Researcher (UXR) has **1-on-1 conversation with user**

- UXR and UX Designers assist
  - Peer review scripts, take notes

- Observers can be developers, data team, leadership, stakeholders

- End interview with **follow-up questions and debrief**

Interviewing a user as a cross-functional team

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Our cross-functional team interviews PRS 2.0 users

- **Usage scenario:** Search for information on Medicare/Medicaid doctors

- **Pain point:** Cannot find a doctor's group practice affiliations easily

- Data team asked follow up question

  "What information do you need to see?"

— Physician Group Membership
Active member: Physician Group A (since YYYY)
Previous member: Physician Group B (YYYY - YYYY)

Conceptualizing how to present doctor's group practice information

Physician / Search Results

John Doe (123451)

— Physician Details

First Name	John	City	Birmingham
Last Name	Doe	State	AL
Middle Name	A	Graduation Year	1993
Suffix	N/A	Medical School	54321
NPI	1234567890	Resident/Intern	In Practice
UPIN	7654321	Medicare Participant	Yes
Encoded Number	12345678	Group Practice	Group
Physician National #	W0987654321	Credentials	Medical Doctor
Birth Date	01/24/1982	AMA Control #	987654321
Death Date	N/A		
Name Change Date	N/A		

which group though?

Last edited 04/02/2021 via [data source]

— Contact Information   Link

Contact Type: Admin   **Business Phone:** (123) 456-7890   Edit

PRS 2.0 design wireframe for doctor's details

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Benefits of cross-functional engagement of users

1 Users can speak **directly to product team** on their needs/concerns

2 Product team members can **more easily empathize** with users

3 Team consensus on product needs are **grounded in user perspectives**

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Engage users by collaborating beyond your team

- ESS Team works with Help Desk Team
- Explore **why HARP users contact the Help Desk**
  - Not being able to login
 - Forgotten password
  - Manual identity proofing

Teams gathering to collaborate

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Outcome of collaborating beyond the HARP team

- Provide the improved Contact Help Desk page
  - Updated with drop-down options to let **users find their use case** that needs help
  - Provide links to enable users to do **self-recovery** to mitigate contact to Help Desk
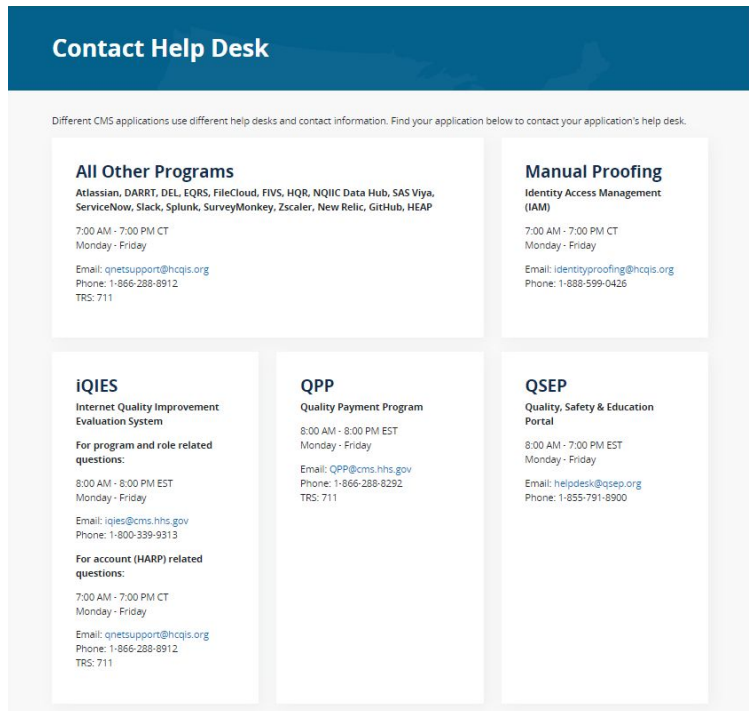
Before updating Contact Help Desk Page
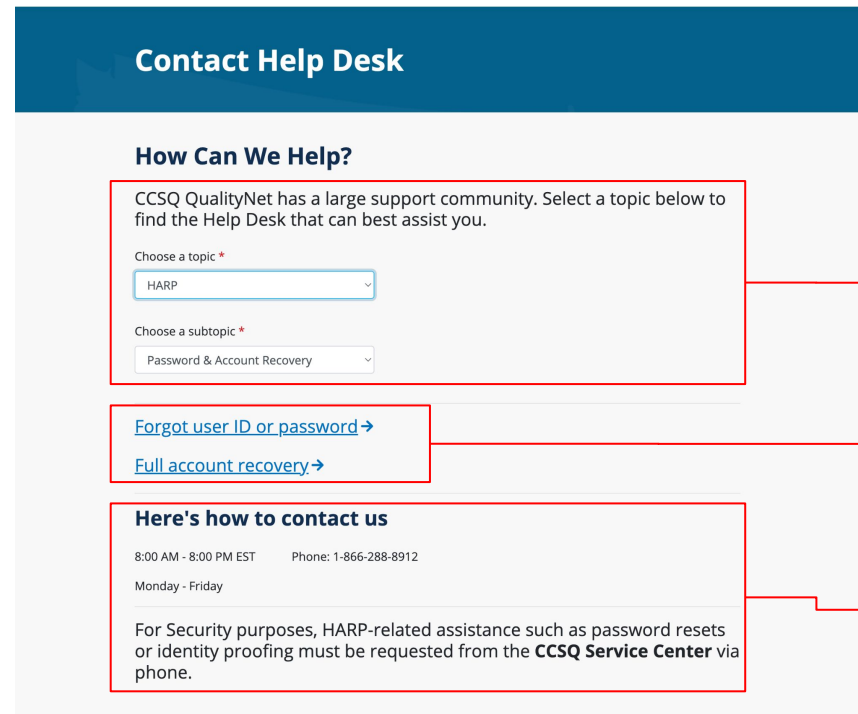
After updating Contact Help Desk page

Drop-down option to find use cases

Links to self-recovery

Help Desk: Contact information

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Benefits of collaborating beyond a product team

(1) Product team can discover user pain points **in real-time** from other teams who interact with the product users

- Better sense of **where and how many users** encounter issues

(2) **Reduce workload** for everyone

- User: solve issues without contacting multiple teams
- Product team: understand user issues sooner
- Other team: reduce support workload

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Continually engage users

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Manage user list to track user participation

- **Track user study participation**
  - Maintain separate user lists for each user group
  - Know who to contact for each research goal
- **Start building relationships with frequent participants from early stage of product**

Survey - Physician + Phy Group + Phy Member (08/2022)	Survey - HSP Edit (04-07/2022)	Card Sort - Physician Tabs (01-02/2022)	PRS Wireframe User Test	Help Desk User Interview	HSAG User Interview	QIO User Interview	Card Sort - MA Plan Tabs (12/2021)	Card Sort - Beneficiary Tabs (10/2021)	Baseline Survey (09/2021)
COMPLETED	COMPLETED	COMPLETED				COMPLETED	COMPLETED	COMPLETED	COMPLETED
COMPLETED	COMPLETED						COMPLETED	COMPLETED	
COMPLETED	COMPLETED						COMPLETED	COMPLETED	
COMPLETED	COMPLETED	INVITE SENT					COMPLETED	COMPLETED	COMPLETED
COMPLETED, NOT RELEVANT	COMPLETED	COMPLETED	COMPLETED				COMPLETED	COMPLETED	COMPLETED
INVITE SENT	COMPLETED	INVITE SENT				COMPLETED	INVITE SENT	INVITE SENT	INVITE SENT

Example of PRS 2.0 user list

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Manage user list to continually engage users

- As **product matures**, user list may grow significantly

- Send surveys to user list

- **Seek out proactive users** for interviews/follow-up questions
  - Nurture good relationships to **encourage continual participation**

UX researcher speaking with a proactive user

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User participation in UX research of early stage product

Identify core user needs in PRS 2.0

- Curating user lists helped identify
  - Majority of 400+ users are **patient-facing**
    - Educate patients, advocate for patients in healthcare quality review cases
  - Users search for doctors/facilities with information **from patients**

Speaking with patient while looking up information on doctors

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"I do like the way with the Health Service Provider **you can now utilize an address** [to search for a healthcare facility], **since they often change their name**."

- user feedback to PRS 2.0

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Benefits of user participation in research of early stage product

1   Nurture user status as **knowledge holders and collaborators**

2   Users **feel invested in product success** when they feel heard

> "Thank you for including me.
> **Working together, we can make [PRS] better for everyone.**"
>
> - user feedback to testing PRS 2.0 design wireframe

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User validation of new features in a mature product

- Explore new enhancements for HARP that can **add value to users** beyond core functionality
  - No landing page after login
  - UX team came up with a dashboard style landing page
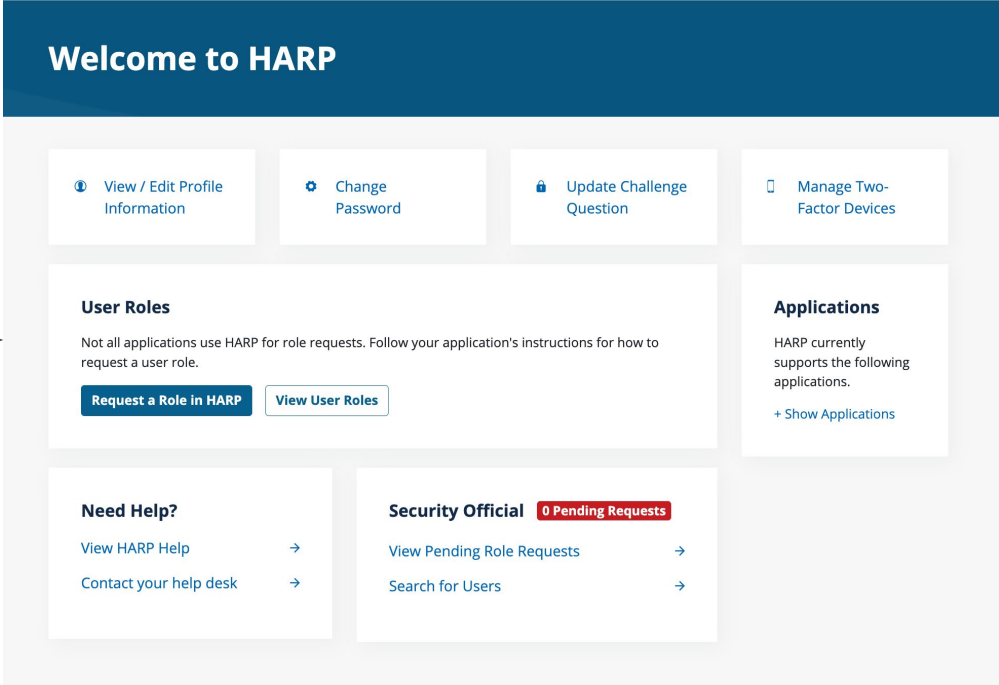 - Conduct user testing with wireframes

UX team validating concepts with users

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Outcome of validating new features with HARP users
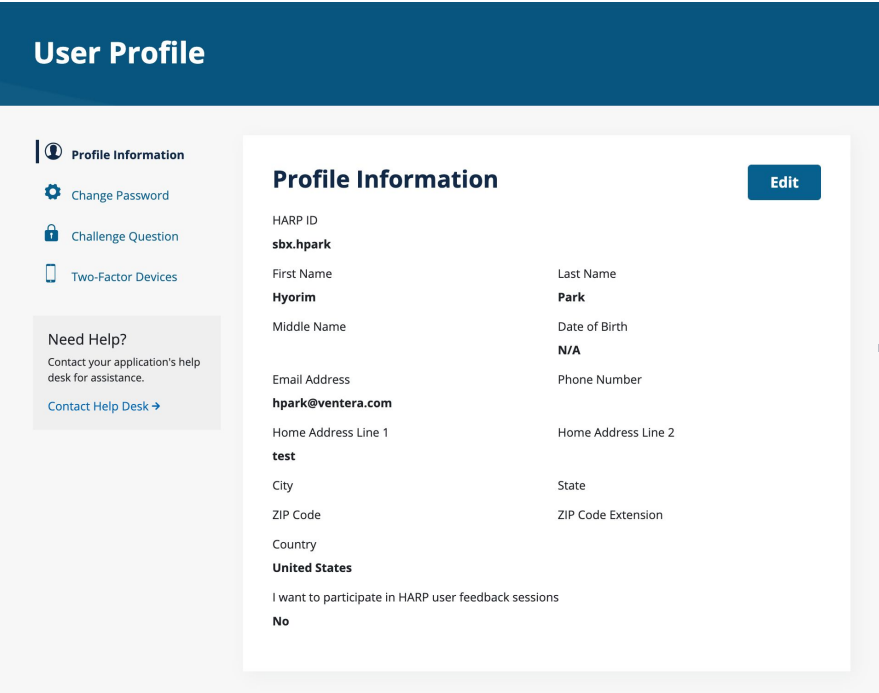
What users saw previously when logging in

New landing page after login

“I think it gives you the options of
what you're here to do right upfront.”

- user feedback to new landing page

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Benefits of validating new features with users

1 Users enjoy new enhancements that, not only meet their core needs, but also **improve their workflow and understanding of product**

2 User validation **prevents the product team from wasting time and resources** on reworking the product, if it does not successfully work as expected after implementation

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Work iteratively, think holistically

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Collect holistic user feedback

- **Open-ended questions at the beginning** of an interview or a user test can **yield spontaneous feedback**

- Create conversational atmosphere to receive **honest and holistic answers on underlying feelings for the product**

Value added:

Provide bigger picture of the user experience
to **break down silos between Agile teams**

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Identify gaps in research scope with users

- **At the end of survey/interview**, also ask open-ended questions

    - Comments, ideas, suggestions

- Gather **feedback** that is not bound by research scope

- Uncover needs and expectations **beyond core user needs**

- Share additional findings in readout

> **Do you have any other comments or suggestions for how we can improve the product?**

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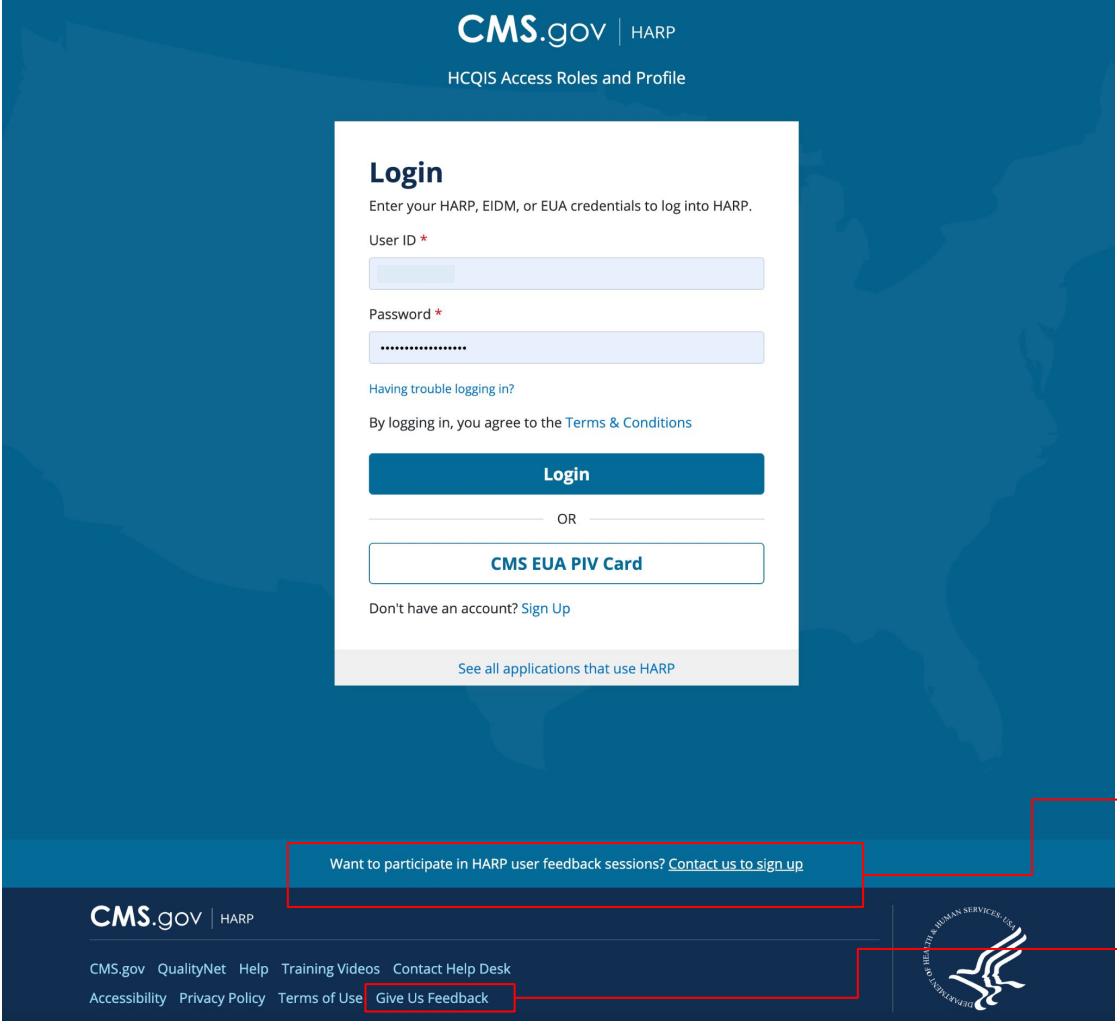
Archive findings beyond current research scope

- **Create a repository** to keep track of additional research findings

- Document findings and insights, including user quotes, to **build a list of seed ideas for future user experience improvements**

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Make ongoing efforts to engage users in UX research

- Provide an **online survey link in the product** to gather feedback from users
    - Design of survey is important to understand user experience, and have users **complete the survey voluntarily**, instead of abandoning it
- Create **easy way for users to sign up** to future UX research as participants

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Make ongoing efforts to engage users in the product

User feedback and participation features on HARP

Link to sign up for future UX research

Link to provide feedback

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Engage users today!

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Best practices for human-centered work processes

1   Product team **works regularly with the UX team** to communicate with users

2   **Consistently manage user lists** to recruit and build trust with users

3   Work in iterations, but keep in mind **user's entire journey** with the product

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Pro-tips to continually engage users

- ❑ **Involve product team and stakeholders** in UX research and design
- ❑ **Keep open communication channels** with other teams that support users
- ❑ **Create encouraging atmosphere** for users to experiment and give feedback
- ❑ **Demonstrate impact** of continual user participation to users and stakeholders
- ❑ **Observe product usage** to discover problem areas
- ❑ **Validate solutions** with users before implementation
- ❑ **Make time** to ask users open-ended questions on full product experience
- ❑ **Create dedicated findings repository** as seed ideas for future research
- ❑ **Embed survey and recruitment in product** for ongoing user feedback

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