Service Now User Personas

3/19/18

Chao
HQR Quality Manager—Provider

"I'm one of those high-maintenance guys that calls the help desk A LOT. It's difficult to find what you need to solve a problem."

Goals
- Deliver the highest quality healthcare to our patients and our community.
- To make sure our patients get the standard of care they deserve.
- To prevent any event that could cause patient harm in our facility.

Pain points
- Need data that's more current.
- QualityNet is hard to use. Need training for self and staff.
- QualityNet documentation is misleading. There are a LOT of steps.
- Help desk security/ID questions for repeated calls on same day.
- Slow response time from help desk.

Needs help desk

Often ——————— Rarely

Comfort with technology
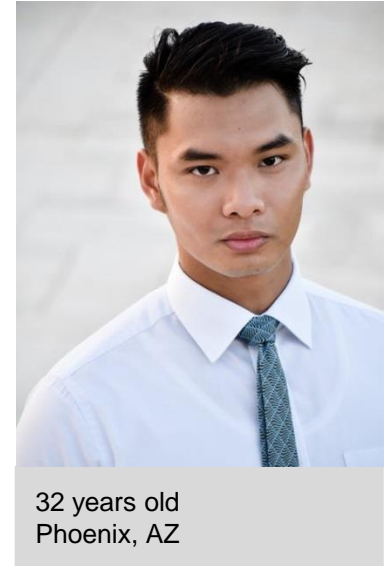
Not very ——————— Very

A day in his life
1. **Educate other staffers** on quality reporting
2. **Abstract core measures** from hundreds of charts
3. **Track readmissions, hospital-acquired conditions and falls and fractures**
4. **Retrieve reports from QualityNet Secure Portal** and distribute to his staff
5. **Communicate with vendors**, such as Truven, Visient, and MedMind, about data they submit on his behalf, and about CMS policies
6. **Communicate CMS policy changes** to his business stakeholders
7. **Participate in the Hospital Improvement Network**
8. **Participate in his state hospital association's quality task force**
9. **Review reports** for data trends
10. **Manually enter data** that his vendor couldn't automatically upload
11. **Set up other users in QualityNet**
12. **Correct any submission errors**

Why & when he needs help
- Decipher PSVA error codes
- Resolve Data Exchange submission errors & web-based submission errors
- Email help desk for feedback before submitting to ensure it's done correctly
- Info on policy clarifications & deadlines
- He can't find info on QualityNet or in CMS emails about how to submit correctly

32 years old
Phoenix, AZ

Uses enterprise services

QualityNet Secure Portal

QualityNet.org

QARM

Data Exchange / Axway

PRIS

PSVA
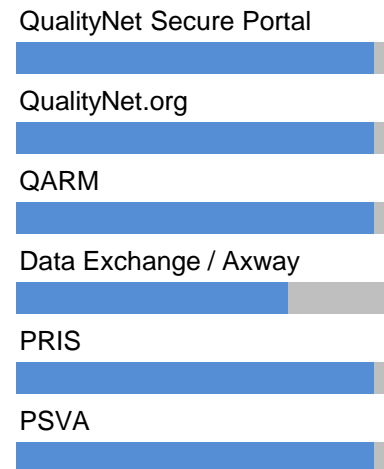
Beth
## HQR Quality Manager—Healthcare System

Goals
- Provide info from hospitals across her org, including to executives
- Ensure data submitted is accurate, since it affects her org's financial performance

Pain points
- 19 different logins: Must log in and out each time to generate or get reports
- Help desk security/ID questions for repeated calls on same day.
- A lot of information to keep track of, from multiple sources
- Slowness of report delivery
- Report data is often 30-60 days old
- Participation reports hard to understand

Needs help desk

Often — Rarely
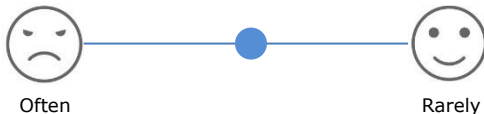
Comfort with technology

Not very — Very

A day in her life

1. **Set up other users in the system**
2. **Generate provider reports** via 19 different logins
3. **Sets up a new vendor relationship**
4. **Uses a vendor to submit core measures**
5. **Post a QualityNet user guide** on her intranet
6. **Train other staff** on quality reporting, including creating job aids
7. **Unlock users** who are locked out
8. **Get QualityNet emails** about reports that are available
9. **Download reports** from QualityNet via 19 separate logins
10. **Get info from vendors** about CMS policy changes and impact assessments
11. **Manually download a calendar** of important quality reporting dates
12. **Review provider participation reports**

Why & when she needs help

- Reports don't generate as expected
- Questions for HSAG about the specifications manuals
- Questions for vendors about policy impacts
- Doesn't want to search through previous RightNow answers before asking her question
- She feels crucial info presented in CW webinars is not documented anywhere

59 years old
Metairie, LA

Uses enterprise services

QualityNet Secure Portal

QualityNet.org

QARM

Data Exchange / Axway

PRIS

PSVA

Glenn
Quality Data Analyst at HQR Vendor

"I believe we can enhance healthcare quality and reduce costs at the same time."

Goals
- Ensure data integrity for CMS and improve US health outcomes
- Provide business value to providers and healthcare systems that use his company to submit data by ensuring accuracy, timeliness, and great customer service
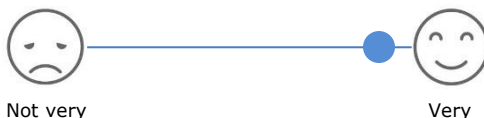
Pain points
- Constant submission errors
- QualityNet is confusing, and he ends up answering a lot of questions about its functionality because it affects how/whether his customers can submit data
- Help desk security/ID questions for repeated calls on same day.

Needs help desk

Often ——————————— Rarely

Comfort with technology

Not very ——————————— Very

A day in his life

1. **Communicate with providers & healthcare systems** about services he's performing for them
2. **Submit data** on behalf of providers and healthcare systems
3. **Communicate CMS policy changes** to his leadership
4. **Perform data abstraction**
5. **Correct data submission errors**
6. **Log help desk tickets** about submission errors
7. **Receive CMS emails** with regulation changes
8. **Attend training webinars & watch videos**
9. **Read specification manuals** for data abstraction

Why & when he needs help

- Resolving data submission errors he cannot resolve himself
- Understanding CMS policy changes so he can explain impacts to his customers

51 years old
Woodlawn, MD

Uses enterprise services

QualityNet Secure Portal

QualityNet.org

QARM

Data Exchange / Axway

PRIS

PSVA

Rachel

EQRS Large Dialysis Org Quality Manager – Batch User

"I have 200 facilities. The help desk knows me. They send me straight to second tier when I call."

Goals
- Ensure data is entered completely and correctly so that reimbursements are not affected
- Enable other people to use CROWNWeb so they can enter data

Pain points
- QualityNet is difficult to use
- CROWNWeb learning process is cumbersome
- Too many sites & logins, easy to get locked out
- Only have three months to enter data
- No good way to remove departed staff from system
- System overloads/is slow in afternoons

Needs help desk

Often ———————— Rarely

Comfort with technology

Not very ———————— Very

A day in her life

1. **Change ownership for a facility** or multiple facilities
2. **Batch submit patient data**
3. **Decipher batch submission errors**
4. **Try to fix errors**
5. **Manually enter data** that didn't get through via batch submission
6. **Call a facility** that had submission errors
7. **Call the help desk** to help her figure out how to submit correctly, or to help fix errors
8. **Oversee QIP data preview** & advise facilities on how to fix
9. **Train new staff** to enter and submit data
10. **Generate Performance Score Summary Reports**

Why & when she needs help

- Login problems for herself or her users
- Decipher batch submission errors
- Help with batch errors she can't fix herself
- Can't remember answers to vague security questions like "something important from your life"
- Can't tell from Remedy ticket resolution email which of her multiple problems has been resolved
- Facility logs a patient incorrectly and it requires help desk intervention to fix
- Can't find answers to her questions in Final Rule

53 years old
Philadelphia, PA

Uses enterprise services

QualityNet Secure Portal

QualityNet.org

QARM

Data Exchange / Axway

PRIS

PSVA
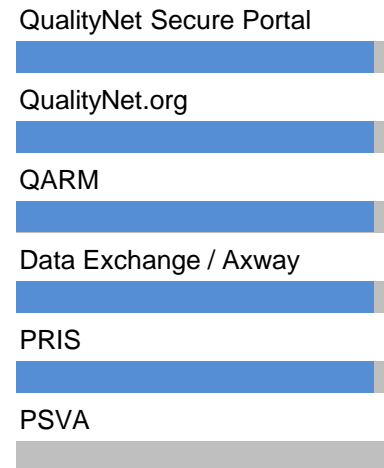
Suresh

EQRS Small/Independent Dialysis Org Data Entry Staff

"These systems are tough to use. Info I need is all over the place. I rely on the ESRD Networks to help make sense of it all."

Goals
- Get his facility paid for meeting CMS quality measures
- Know about deadlines and policy changes far in advance

Pain points
- Reports take hours or days
- Systems can be so slow they seem broken
- Info he needs is in too many places, and sources conflict
- Steep learning curve of using systems
- Too many logins, too many steps

Needs help desk

Often ———————●——————— Rarely

Comfort with technology

Not very ———————————●— Very

A day in his life

1. **Communicate with his ESRD network** about policy changes & deadlines affecting CROWNWeb data
2. **Admit an ESRD patient** into CROWNWeb
3. **Find out what forms need to be completed**
4. **Complete 2744 facility survey forms**
5. **Complete 2728 entitlement forms**
6. **Mark a patient as deceased**
7. **Complete 2746 death forms**
8. **Make changes to data files** based on submission feedback
9. **Decipher submission errors**
10. **Change contact info** for his facility
11. **Suspend a former colleague's submission access**
12. **Onboard a new colleague** & help them get a QualityNet account
13. **Confirm format requirements** for submission
14. **Generate & display** Performance Score Certificate in the facility

Why & when he needs help

- Account access
- Login problems for himself
- Info on policies & deadlines to complete his work
- Troubleshooting dated technology
- Help deciphering portal notifications
- Help when a confirmation email didn't arrive

28 years old
San Diego, CA

Uses enterprise services

QualityNet Secure Portal

QualityNet.org

QARM

Data Exchange / Axway

PRIS

PSVA