CWoW Conceptual & Evaluative User Research Moderator's Guide

DaVita MCoE Research Team / August 7-9, 2017
Chicago, IL

User Research Session: _____

Participant Name: _____

Participant Role: _____

Intro

Hi, my name is _____.

We are working with the team that is developing concepts for new clinical systems for the CWOW project. Are you familiar with the CWOW project?

Over a five-year period, CWOW will replace Chairside Snappy, Snappy, Falcon and many paper-based and manual processes like the One Stop tool.

When this new system is complete it would allow you to perform and document Patient Treatment, have access Patient data across multiple centers, enter orders, manage charting & assessments, access reports, as well as area champion documentation and management all in one system.

In addition, this new application will help you to manage and track activities like what is currently in the One Stop tool. Walking you through steps of the CVC removal protocol.

What we are looking at today is a prototype. It is not connected to real data and all the links don't work. There are some places we will just have to pretend that the system works.

 I will ask you to walk through some screens and see what works and what doesn't work for you.

A couple things to keep in mind:

- There are no right or wrong answers in the interview today.
- We did not design these screens; you cannot hurt our feelings.
- We are interested in your thoughts, reactions and experiences, so please be honest with your thoughts and feelings regarding the process.

Go ahead and 'think aloud' as we go through the concepts so I know what you're thinking and doing.

Do you have any questions before we get started?

Background

— What is your role in the clinic?

— How long have you been working in dialysis?

— What clinic do you work in?

— Do you work in multiple clinics?

— How large is the clinic(s)?

— Is this clinic piloting CWOW?

— Are you an area champion for any initiative?

— If so, which one?

— I am curious; do you use a personal tablet (iPad/Android) device outside of work (to conduct non-work related activities)?

— If you use one, what do you use it for? PROBE: playing games, streaming entertainment, reading, surfing, banking, shopping, cooking in the kitchen, etc.

— How many years have you been using a tablet? Smartphone?

— If you have a choice, do you prefer to use a tablet or a desktop computer?

Diet Order: Evaluative Research
RD, RN Only
https://davita.invisionapp.com/d/main#/projects/11639825

Concept 1: Standard/Adjusted Weight Calculations

Objective
- To ensure Teammates understand which weight they are documenting (not target weight)
- To see if the labels and placement of fields make sense to Teammates

Participant Instructions/ Set Up
We're looking at the Diet Order screen for patient Jackson Bowman.

Questions

1. How would you enter 75kg for the standard body weight for the patient?

2. What does standard body weight mean to you?

   - What does adjusted body weight mean to you?

   - How often do you use standard body weight compared to adjusted body weight?

3. Let's pretend that you entered all this information in (that is filled in for you here). What do these numbers mean to you?

   - For calories, what does the 2,250 kcal/day mean?

   - How was that calculated?

- Does it make sense that the standard weight of 75kg that you entered is used to calculate the kcal/day for the diet order?

4. What do you think of the spacing and layout of the form?

   - Does the order of the fields follow your current workflow?

   - If not, what is missing or what would you want added?

5. What does "no restrictions" mean to you?

   - Are there any categories that "no restrictions" doesn't make sense to have as an option? Why?

Concept 2: Diet Modifications

Objective
- To see if Teammates understand how to add a modification
- To see if the options under modifications are the right options
- To assess whetether Teammates understand how to discard and save the modifications

Participant Instructions/ Set Up
Now let's say Jackson Bowman has some modifications to his diet including Calories Decreased for Weight Loss, Carb Controlled and Lactose Free.

Questions

6. How would you document those modifications?

   - Does that make sense to you?

7. Read through the headings. Do they make sense to you? Why or Why not?

8. Are there any other diet modification options you would want to see here?

9. Are there any other texture modification options you would want to see?

10. Let's say you actually didn't need to add any diet modifications after all. How would you get rid of what you added? [Note: they should select "discard changes" button]

    - Does the label make sense to you? Would you like it to say something else?

11. Let's go back to adding a diet modification. How would save your modifications? [Note: have to select Save]

12. What do you see now? [Note: they will see the modifications listed on the read-only view]

13. How would you submit the diet order? [Note: they can either select Preview and Submit from there, or select Submit]

Expiring Certifications: Conceptual Research
RD, RN, PCT, FA, SW, LPN

Concept 1: Notifications

Objective
- To assess what verbiage for notifications make the most sense to Teammates
- To find out how often Teammates would like to be notified of expiring credentials/license

Participant Instructions/ Set Up
(Note: This test includes the paper with the list of notifications to show Teammates)
We are not going to be showing you a prototype but wanted to get your input on your preferences for notificaitons, particularly notifications regarding expiring licenses and/or certifications. Please read through the following notifications:

> Please be aware that your **(State) Registered Nurse License** will expire on xx/xx/xxxx. You have 60 *(Count down each day message appears: 59, 58, 57, etc)* days to renew. Please contact LicensePartners@davita.com once you have renewed and received your new license.
> (*At 1-day left, the message should read:)*

EXPIRES TOMORROW:

A. Please be aware that your **(State) Registered Nurse License** expires tomorrow xx/xx/xxxx. Please renew immediately to prevent losing access to the system.

B. Please be aware that your (State and/or National) PCT Certification (or RN license, etc) expires tomorrow xx/xx/xxxx. Your access to the system will be denied. Please contact your FA.

C. Please be aware that your (State and/or National) (PCT/RN/LPN) Certification/Licensure expires tomorrow xx/xx/xxxx. After 11:59 pm on xx/xx/xxxx your access as a "PCT/RN/LPN" to the CWOW application will be disabled. Please contact your FA and License Partners to submit a copy of your credentials. License Partners can be reached at 1-866-635-1311 or licensepartners@davita.com

Questions

1. Which notifications above are the most helpful?

   - Why?

   - Is there any information missing from the notification that you would want to see? Or is there anything in the notification you don't need to see?

2. Does it make sense to contact an FA for help? Does your FA have the ability to help in this case?

   - What does an FA do compared to the help desk or License Partners?

   - Is there anyone else you would contact to help in this situation that we should be aware of?

3. When would you like to first be alerted that your license will expire?

   - 60 days? 90 days? Something else?

4. Would you want to receive these alerts daily? Why or why not?

   - Or, weekly until x weeks, then daily?

   - Other ideas/preferenes for frequency?

Disputed Orders & Justification Clarification: Evaluative Research
RD, RN Only
https://davita.invisionapp.com/share/BQC77KI9W

Concept 1: Dispute Order, Dispute History, Refute & Dispute, Read Only View

Objective
- To ensure Teammates understand how to dispute an order
- To see if Teammates understand the difference between refuting and disputing an order
- To understand the value of the Read Only view to Teammates for disputes

Participant Instructions/ Set Up
(Note: Don't use arrows to navigate the screen, only use hotspots)
The screen you are on is a list of tasks that include task details and disputed orders.

Questions
1. Let's say you want to view a disputed order task for patient Jackson Bowman. How would you do that?

2. Walk me through what you see on this screen.

3. Is the information you need on the summary the right information?

   If not, what else would you like to see here?

4. How would you view the full order?

   - Is this the information you would expect to see? Why or why not?

- What do you think about the layout of the information? Is it easy to read?

- Do you need to see the full order on disputed orders? Why or why not?

- You can go ahead and close out of the read-only view

5. What does Dispute History mean to you?

6. What does Refute Dispute mean to you?

7. What do you think would happen if you selected Entered in Error? [Note: You can't select Entered in Error]

8. If you needed to change provider, how would you do that? [Note: at this point assume you would choose the provider, we don't have that to show you for this test]

   - After selecting Change Provider, what did you see happen? [Note: it will be added to Dispute History, Task will be Closed now]

   - How would you go back to the Open Tasks screen? [Note: back button]

Concept 2: Justification Clarification

Objective
- To find out if Teammates understand how to edit a justification clarification
- To see if Teammates understand how to submit a clarification
- To assess if the justification clarification summary contains the necessary information
- To see if Teammates need to the view the full order

Participant Instructions/ Set Up

Now we are back on the Open Tasks screen.

Questions

9. How would you view the Order Justificiation Clarification details?

10. Is this the type of information you would need for the summary? If not, what would you like to see?

11. Does it make sense to also be able to view the full order here? Why or why not?

12. Let's say you needed to remove the justification "Empiric (Suspected or observed infection)" - how would you do that? [Note: Select Edit, then Remove]

    - What do see happened? Did anything change on this screen?

13. How would you submit your changes?

    - Is this where you would expect to go after submitting?

Flowsheet
RN, PCT, AA
https://davita.invisionapp.com/d/main/#/console/11603206/245024353/preview

Concept 1: Flowsheet Entry Functionality and Layout

Objective
- To ensure the functionality (calculations) and layout of the flowsheet makes sense to Teammates
- To make sure Teammates understand how to edit the Flowsheet
- To see what information Teammates want to see in the Read-Only view

Participant Instructions/ Set Up
(Note: This test includes the use of the paper flowsheet)
Let's pretend you documented something on a paper flowsheet and now you need to go back and document a summary of that information into CWOW. You are currently looking at the Treatment Events screen for patient Emmet Brown.

Questions
1. There are two types of treatment events you can document Flowsheets/Vital Services and Missed Treatments. How would you add a Flowsheet/Vital Services Event?

2. Before clicking anything, take a minute to look at the Flowsheet. Does the organization of the fields make sense to you?

   - Is there anything missing or that needs to be taken out?

   - Does the layout of the information make sense to you?

3. You can start clicking through the fields. Some of the information will populate on it's

    own. For this test, let's say you don't want to use prescribed access, you want to use

    concurrent.

    - How would you do that?

    - Left for Arterial

    - Right for Venous

    - Does that flow make sense to you?

4. Let's imagine the previous treatment vitals have been pulled in by the system. Does the

    organization make sense to you?

    - Is the info grouped in a way that you expect it to be?

    - If not, what would you like changed?

5. Is this how you would like to see blood pressure and heart rate for sitting and standing?

    - If not, how would you like to see it?

6. What do you see happen when filling out weights, treatment time?

    - Do you understand that CWOW is automatically calculating for you and that it is

      being generated from the last flowsheet? Is that helpful?

    - Is military time the format you expect to see the time in?

7. After all the information is entered (Venous Pressure, Blood Flow Rate, and Dialysis Flow

    Rate) you can submit the information. How would you do that?

    - What do you see now?

    - Does the Read-Only view make sense?

8. Let's say you want to remove the flowsheet, how would you do that?

- What do you see? [Note: warning message]

- What would you do now after seeing this message to remove the flowsheet?

- Where are you now? [Note: list], does that make sense?

9. What is your overall feeling about adding a Treatment Event/Flowsheet?

Patient Details/Clinical Details
RN, PCT, AA
https://davita.invisionapp.com/d/main#/projects/11678057

Concept 1: Document Status, Height, Weight and Amputation History, Error/Validation Messages

Objective
- To ensure Teammates understand how to view, enter and edit Height and Weight histories
- To see if Teammates understand the Error/Validation Messages

Participant Instructions/ Set Up
We are now going to take a look at Patient and Clinical Details for Emmett Brown.

Questions
1. Walk me through what you see on this screen. Is this what you would expect to see on the Clinical details screen?

2. How would you go about entering the Health Status non-diabetic for this patient?

3. Let's pretend you entered 108 inches for the height and you saw this message. What does it mean to you?

4. How would you change it to the correct height of 90 inches?

5. The patient has an Amputation Status for the Right Arm for All Fingers in March of 2015. How would you enter that information?
   - Does that make sense?

6. Now that you are done entering all the information what would you do to save those entries?

7. [Note: user will be shown an error message for height entry] What does this message mean to you?

Concept 2: Entered in Error for Height and Amputation Status

Objective

- To see if Teammate know to go to View/Edit History to edit and mark entries as "Entered in Error"

Participant Instructions/ Set Up

Let's imagine a couple days pass and you realize it the height was incorrectly entered. It is actually 70 inches, so you will need to record 90 inches as entered in error.

Questions

8. The height documented on 6/29/2017 is incorrect and is negatively effecting the kt/V value. How would you go about marking the height as Entered in Error so that it doesn't effect the kt/V? [Note: We want to see if they

Scenario 1: click "Edit" at the top right

Scenario 2: they go to "View/Edit History", then "Edit", check the box and then Save, which is what they should do]

- Did that process make sense? Why or why not?

- How would you save these changes?

- What does this message mean to you?

- Go ahead and enter 70 inches as the correct height and submit it, does that make sense?

9. You found out that the patient actually did not have an amputation of All Fingers. How would you mark that entry as Entered in Error?

- Did this process make sense to you?

- Is this what you would expect to see?

- [NOTE: Make sure to find out it they know to go back to clinical details to finish the task or see if they think they are done. Take notes on what they do. They should select the back button. If they go back to clinical details then ask Question #10. If they don't, end the test here]

10 What do you see now for amputations?

11 The patient actually had four fingers amputated instead of all fingers. How would you enter that as an error?

- How would you save those changes?

- [Note: Message says marked in error without ability to enter the correct one. User will have to:

    1. Enter Save

    2. Select back

    3. See that it says "No Documented Amputations"

4. Select Edit

5. Record four fingers and hit Save

- What do you think of that process?

12 Is there anything about the overall clinical details screens that you would like to share with us?

Wrap Up

[Re-iterate what you heard from the participant]

- Is there anything you would like to cover that we did not ask you?

- On a scale of 1-5 (1 "I'm not at all satisfied", 5 "I'm extretmely satisfied"), how would you rate your overall satisfaction with CWOW application and what you saw today?

- Do you have any final thoughts about the concepts you would like to share?

- I would like to hear your thoughts about the CWoW application in general?