

ABC Order HS Usability Testing

Summary of Findings

CONTENTS

1. Research Approach

- a. Goals
- b. Participants
- c. Testing Approach
- d. Features Tested

2. Key Findings

- a. Successes
- b. Issues

3. Appendix/Resources

- a. Discussion Guide
- b. Airtable Notes
- c. Highlight Reels

Dashboard

Ordering 

Receiving

Reporting 

Support Services

Settings 

RESEARCH APPROACH

GOALS

Prior to Pilot, understand how well customers are/are not able to perform tasks using the MVP version of ABC Order HS.

Identify any usability issues prior to launch.

Identify potential enhancements for next phase of development.

Participants

Profile

- 20 total participants
- Current PassPort users from Health Systems customers
- ABC Order Pilot customers

Responsibilities

20 ordering

12 receiving

11 reporting

| A Name | Role | Responsibilities |
|----------------|-----------------------------|--|
| Participant 1 | Buyer | Ordering Receiving Approvals |
| Participant 2 | Director of Pharmacy | Ordering Reporting |
| Participant 3 | Buyer | Ordering Receiving |
| Participant 4 | Director of Pharmacy | Ordering |
| Participant 5 | Buyer | Returns Ordering |
| Participant 6 | Buyer Lead Technician | Ordering Receiving Reporting |
| Participant 7 | Director of Pharmacy | Ordering Reporting |
| Participant 8 | Pharmacy Operations Manager | Approvals |
| Participant 9 | Buyer | Ordering |
| Participant 10 | Director of Pharmacy | Ordering Reporting Receiving |
| Participant 11 | | Ordering Receiving |
| Participant 12 | Director of Pharmacy | Approvals Ordering Receiving Reporting |
| Participant 13 | Director of Pharmacy | Approvals Ordering Receiving Reporting |
| Participant 14 | Lead Technician | Ordering Returns |
| Participant 15 | Director of Pharmacy | Ordering Receiving Reporting |
| Participant 16 | Buyer | Ordering Reporting |
| Participant 17 | Buyer | Ordering Receiving |
| Participant 18 | Buyer | Ordering Receiving Reporting Returns |
| Participant 19 | Director of Pharmacy | Ordering Receiving Reporting Returns |
| Participant 20 | Buyer | Ordering Receiving Reporting Returns |

Testing Approach

Remote Moderated

- Facilitators and note takers co-located in Chesterbrook
- Participants joined WebEx remotely
- Screen and audio recorded

Task-Based Usability Test

- Training environment configured with data to simulate realistic scenarios (accounts, facilities, recent orders, formulary, etc.)
- Participants given tasks to complete

Features Tested

17

Tasks in
Script

20

Participants

83%

Tasks
Completed*

Ordering

- Catalog search
- Find product on contract
- Find product on formulary
- Check status of open order
- Create new order
- Add items to active order
- Facility and account switcher
- Resolve exceptions
- Find alternatives
- Submit return
- CSOS signing
- Add product note
- Back order

3

Tasks in
Script

9

Participants

100%

Tasks
Completed*

Receiving

- Global navigation
- Match all products
- Enter overages and shortages
- Receive invoice

9

Tasks in
Script

11

Participants

75%

Tasks
Completed*

Reporting

- Create new report from template
- Create new report from blank
- Edit report title
- Select accounts
- Edit filters
- Run report
- Save report
- Export report
- Edit report settings
- Spend at a glance

*includes tasks completed with
some difficulty or guidance

KEY FINDINGS

SUCCESSSES

Successes

Health Systems

1 Catalog Search

- Users are successfully finding and using catalog search.

2 Filters

- Most users felt confident using filters to refine search results.

3 Clearing Exceptions

- Most users were able to successfully resolve exceptions.

4 Receiving

- Users successfully received invoices and entered overages and shortages.

5 Product Detail Page

- Positive reactions to product detail page information.

Reporting

6 Date Picker

- Successful use of date picker.

SUCSESSES

1 Catalog Search

Users were able to find and use catalog search without any problems.

"Nice, generic comes up anyway. I like that" - Alesha

"This doesn't have to make you think" - Tarlesa



test1 | Test 1 Sign Out

tylenol × Search

13 Results for "tylenol"

Catalog Type

- Active Products
- All ABC Products

Refine Search

- In Stock

| Description | Form | Unit Size |
|---|--------|-----------|
|  TYLENOL PM EXTRA STRENGTH CAPLET 24CT ZB 10142572 00450-0482-25 J&J CONSUMER INC 100+ | CAPLET | 24 |

SUCCESSSES

2 Filters

Most users felt confident in using filters to refine search results.

"I do like the filters down here, like strength and stuff. If you're searching for Tylenol you could be searching all day"
- Cathie

"I have filters finally, thank you guys"
- Jeremy

Catalog Type

- Active Products
- All ABC Products

Refine Search

- In Stock
- Usage Only
- Contract Only

[✕ CLEAR SELECTED](#)

Unit Dose

- Non Unit Dose (12)
- Unit Dose (1)

Strength

- 160 mg/5 mL (5 mL) (1)
- 300 mg-30 mg (3)
- 300 mg-60 mg (4)
- 5 mg-10 mg-325 mg-200 mg (1)

[See More](#)

- > Form
- > Unit Size
- > Supplier
- > Branded Vs. Generic
- > Color
- > Generic Names

Description

 **TYLENOL PM EXTRA STRENGTH CAPLET 24CT** ZB U
10142572
00450-0482-25
J&J CONSUMER INC 100+

 **TYLENOL COLD /FLU SEVERE CAPLET 24CT** ZB U F
10104669
00450-0270-26
J&J CONSUMER INC 100+

[Product on Special](#)

 **TYLENOL EXTRA STRENGTH CAPLET 100 CT** ZB
10012983
50580-0449-09
J&J CONSUMER INC 100+

[Product on Special](#)

 **TYLENOL PM EXTRA STRENGTH CAPLET 100CT** ZB
10142573
00450-0482-11
J&J CONSUMER INC 100+

 **TYLENOL EXTRA STRENGTH VIAL CAPLET 12X10CT** ZB F
10009391
50580-0449-15
CASHCO DISTRIBUTORS, ... 100+

 **ACETAMINOPHEN-CODEINE 300-30MG TAB 100** AA
10042529
00093-0150-01
TEVA PHARMACEUTICALS... 100+

 **ACETAMINOPHEN-CODEINE 300-60MG TAB 100** AA
10042532
00093-0150-01

SUCCESSSES

3 Clearing Exceptions

Most users successfully resolved all exceptions without hesitation (find alternatives, add dropship information, back order, remove from order).

"It's nice down there that you see all of the alternatives" - Tom

"I'm sure I can learn it, I think it's nice. I like how things are grouped better than the other system" - Joan

Ordering

Hospital - Satellite

My Orders

| <input type="checkbox"/> | Description ▲ | | |
|---|--|--|-----------------|
| <input type="checkbox"/> |  10002197 54323-0215-02 FLANDERS INC | | 0 |
| Out of Stock <input type="checkbox"/> Back Order | | | |
| <input type="checkbox"/> |  GNP BERRY CHOICE CAP WHT WCR 450X13/16DR 10102151 BERRY PLASTICS | | 100+ |
| <input type="checkbox"/> |  HEPARIN LOCK 500 UN-5 ML SYG 30X5 ML ZB 10008460 08290-3064-24 BECTON DICKINSON/M-S | | 100+ |
| Non-Returnable Product | | | |
| <input type="checkbox"/> |  JEWELERS RESOURCE DROP SHIP 10007060 JEWELERS RESOURCE CO | | DROPSHIP |
| Dropship info required Add Info | | | |

PRODUCTS 9 | TOTAL COST \$621.26 | CONTRACT \$21.42 | NON CONTRACT \$599.84

SUCCESSES

4 Receiving

Users successfully received invoices and entered overages and shortages.

"I think that was actually pretty nice to be able to just hit that match all, because we can use that now with the scanner, but it's not working for us"
- Andrea

"This would be nice instead of marking each one the correct quantity individually" - Andrea

Search for Products

Search

Reset

| Receipt Date | Invoice Qty | Receipt Qty | Status |
|--------------|-------------|-------------|--------|
|--------------|-------------|-------------|--------|

06/01/2018

96

98



06/01/2018

96

96



06/01/2018

96

94



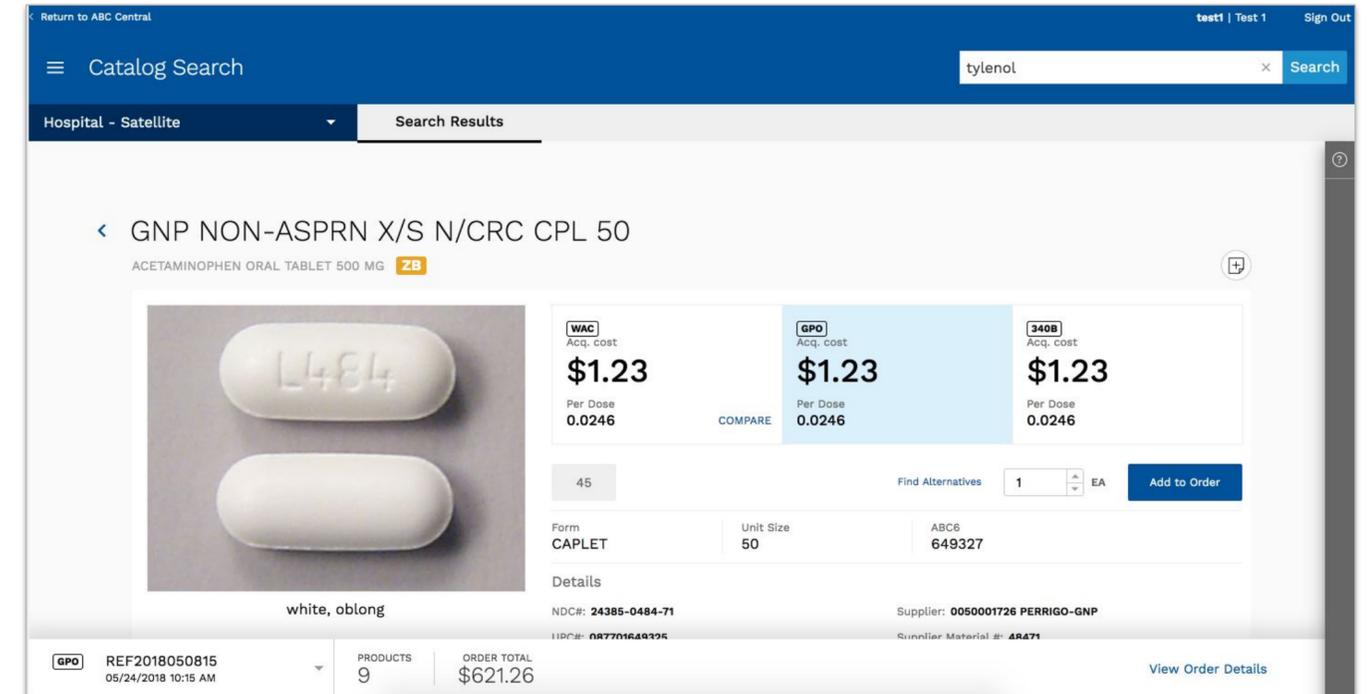
Cancel

Receive

SUCCESSSES

5 Product Detail Page

Positive reactions to product detail page information, including price comparisons and product history.



Product Description Product History Medicare / Medicaid Drug Information

Usage and Purchase History Detail
Hospital - Satellite

Show: WAC GPO 340B Export

| Date | PO | Invoice | Contract | Unit Price | Qty Ordered | Qty Shipped | Total |
|------------|----|---------|----------|------------|-------------|-------------|----------|
| June 2018 | - | - | - | - | 0 | 0 | \$0.00 |
| May 2018 | - | - | - | - | 0 | 0 | \$0.00 |
| April 2018 | - | - | - | - | 10 | 10 | \$282.00 |

"I like that the three accounts have prices" - Jill

"This is all one page which is nice" - John

"This is nice to have all on one page" - Alesha

"It's a nice layout" - Deidra

SUCCESSSES

6 Date Picker

Most users successfully used the date picker to choose report date range.

"I like how start and end dates are on the same page" - Alesha

Select a date range for your report

Start Date (MM/DD/YY) - End Date (MM/DD/YY)

« < May 2018 > » June 2018 >>

| S | M | T | W | T | F | S | S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|----|----|----|----|----|----|----|
| | | 1 | 2 | 3 | 4 | 5 | | | | | | 1 | 2 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 | 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 | 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| 27 | 28 | 29 | 30 | 31 | | | 24 | 25 | 26 | 27 | 28 | 29 | 30 |

Cancel

ISSUES

Key Issues Overview

Health Systems

1 Creating Orders **HIGH**

- Users are unsure how to create a new order from the dashboard.
- Users are missing the blue plus icon to create a new order.

2 Product Indicators **HIGH**

- Users are struggling to understand colored contract ribbons, formulary icons, and usage icons.

3 Navigation **HIGH**

- Users are selecting “Return to ABC Central” to try to get to the dashboard or other sections.
- Many users are attempting to navigate to the order details page through the order name on the active order bar.
- Some users are confused by global navigation (hamburger menu) vs. account/facility dropdown.

4 Filters in Consecutive Searches **MED**

- Users are confused by filters staying selected from one search to the next.

5 Search Results Display **MED**

- Potential issues with information density on for product search results.

Reporting

6 Report Titles **HIGH**

- Users are not understanding that report title is clickable and editable.
- Many users are entering the report title in the description field.

7 Column Layout **MED**

- Users are struggling to change column layout in reports.

8 Filters **LOW**

- Users are struggling to use report filters.

SEVERITY

HIGH

MED

LOW

HEALTH SYSTEMS ISSUES

ISSUES

1 Creating Orders

Some users were not able to find how to create an order from the dashboard and did not understand the blue plus button for create new order.

Severity

High

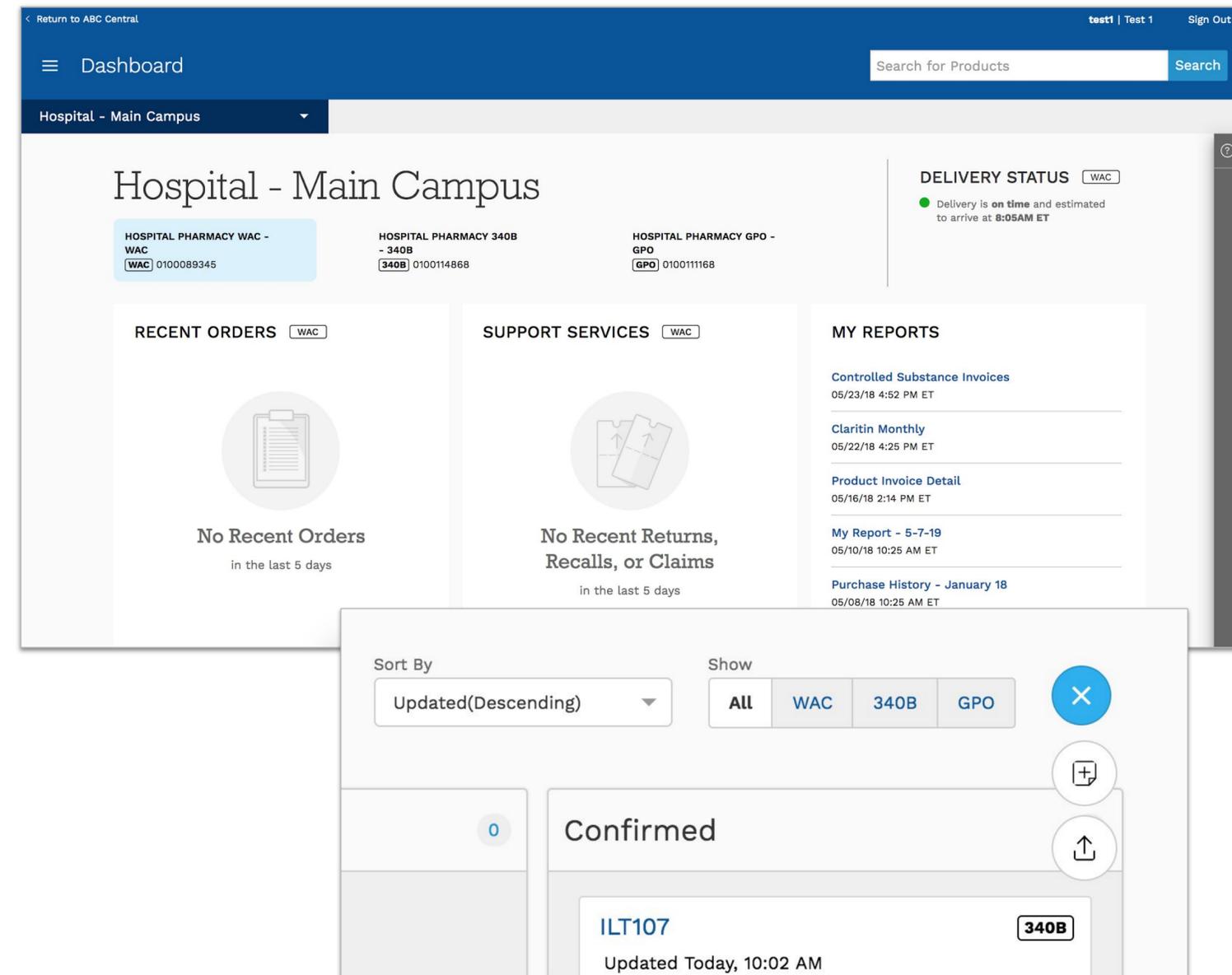
Recommendations

Make “create order” button more prominent and add possibility to create order from dashboard. Consider adding a tooltip or label to the “create order” button.

"On the old system, there was a screen for standard order. I don't see it here" - Richard

"Would I click into ordering? Is that where the account is? In Passport I go into ordering" - Alesha

"This plus symbol is a strange little symbol. It's not very intuitive. I would want a create new order indication on the side" - Richard



2 Product Indicators

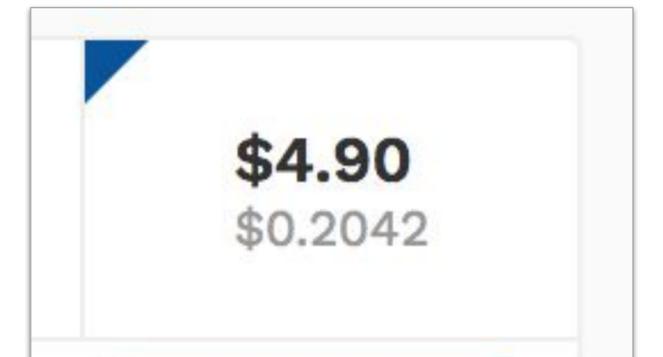
Users are struggling to understand product indicators (colored contract ribbons, formulary icon, usage icon). Color coding, formulary and usage icons, and contract ribbons are not clear to many users.

Severity

High

Recommendations

Consider simplifying the solution for contract indicators. Also, include a legend for icons and visual indicators.



"What's the blue and the green tab?" (thinks it means it's on contract or if it's almost out) - Erica

"The blue line must be on contract, but the green should also mean it's on contract" - Tarlesa

ISSUES

3 Navigation

Users have difficulty navigating within the system and between sections.

- Users are selecting “Return to ABC Central” to try to get to dashboard or other sections.
- Several users expressed difficulty trying to get to the dashboard or other sections.
- Some users are attempting to navigate to Order Details by clicking the order name on the active order bar.

Severity

High

Recommendations

- Highlight navigation in onboarding.
- Consider alternative UI treatments for hamburger menu and/or facility/account dropdown.

< Return to ABC Central

≡ Ordering

Hospital - Main Campus ▼

FACILITIES

Hospital - Main Campus

3 ACCOUNTS

DEFAULT

Hospital - Satellite

3 ACCOUNTS

ACCOUNTS

HOSPITAL OUTPATIENT PHARMACY RX

OP 0100052061

Updated Today, 09:29 AM

4 Filters in Consecutive Searches

Users are confused by filters staying selected from one search to the next.

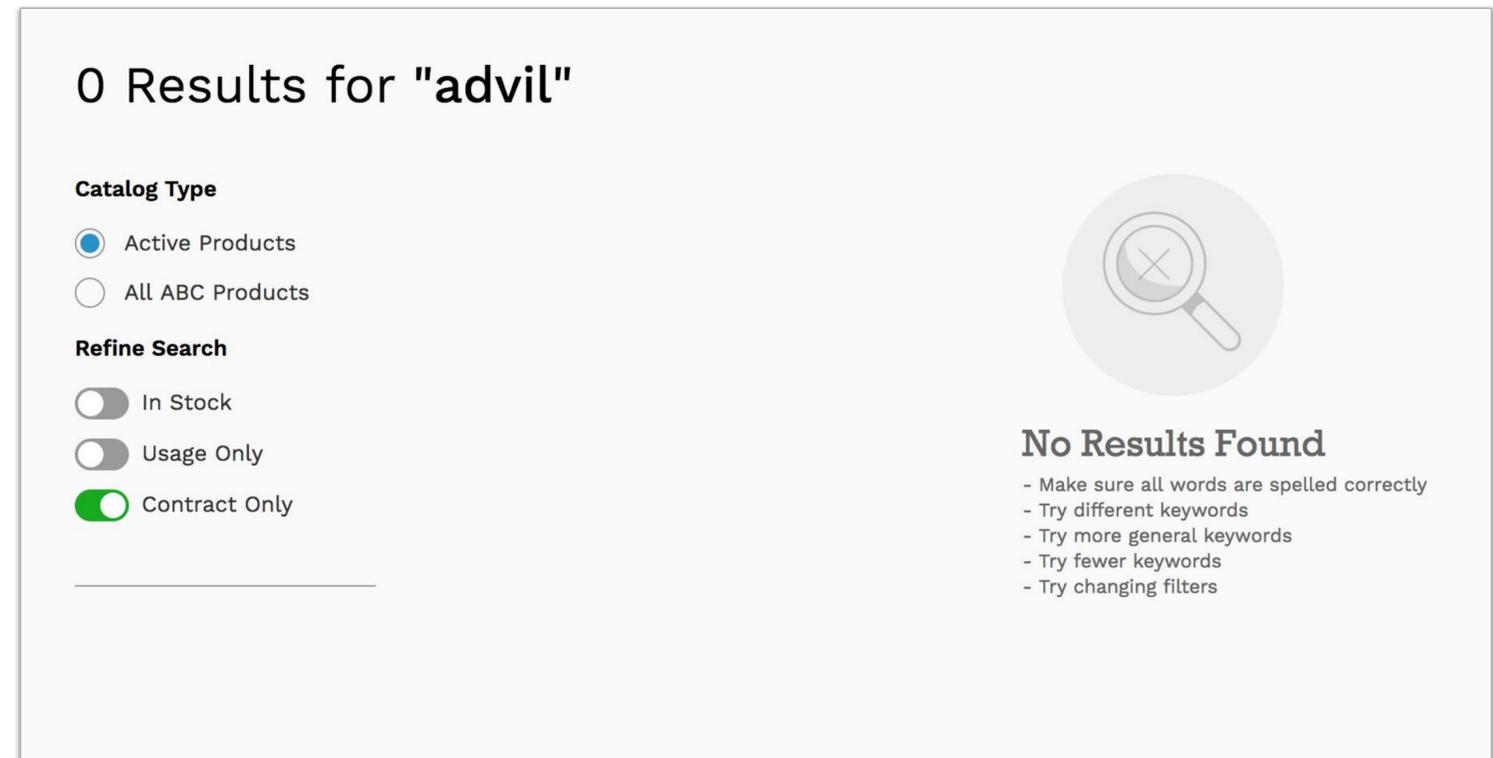
Some users searched for a product but received no results because the contract only filter was still on. Users often attributed this to a mistake in the search term, rather than having a filter selected.

Severity

Medium

Recommendations

Consider helper text/visuals for empty state search results with filters selected (similar to CSP).



5 Search Results Display

Some users expressed being overwhelmed by the amount of information in search results. Others desired the ability to view more products on screen at once.

Severity

Medium

Recommendations

Consider adding a list view or condensed view as an alternative.

| | | | | | | | | | | | | |
|---|--|------|--------|-----|--------|--------------------|---------------------|--------------------|-------------------|---|----|-----|
|  | TYLENOL PM EXTRA STRENGTH CAPLET 24CT ZB 10142572 00450-0482-25 J&J CONSUMER INC | 100+ | CAPLET | 24 | 338355 | \$3.51 \$0.1463 | \$3.56 \$0.1483 | \$3.03 \$0.1263 | Find Alternatives | 1 | EA | Add |
|  | TYLENOL COLD /FLU SEVERE CAPLET 24CT ZB 10104669 00450-0270-26 J&J CONSUMER INC | 100+ | CAPLET | 24 | 170647 | \$5.07 \$0.2113 | \$5.22 \$0.2175 | \$4.90 \$0.2042 | Find Alternatives | 1 | EA | Add |
| Product on Special | | | | | | | | | | | | |
|  | TYLENOL EXTRA STRENGTH CAPLET 100 CT ZB 10012983 50580-0449-09 J&J CONSUMER INC | 100+ | CAPLET | 100 | 130625 | \$8.43 \$0.0843 | \$8.86 \$0.0886 | \$8.00 \$0.0800 | Find Alternatives | 1 | EA | Add |
| Product on Special | | | | | | | | | | | | |
|  | TYLENOL PM EXTRA STRENGTH CAPLET 100CT ZB 10142573 00450-0482-11 J&J CONSUMER INC | 100+ | CAPLET | 100 | 338362 | \$9.85 \$0.0985 | \$10.01 \$0.1001 | \$8.48 \$0.0848 | Find Alternatives | 1 | EA | Add |

"It looks a little complicated to me" - Julie

"This is hard - you always want to make sure you're getting the best deal, scrolling through this since they're so spread out is going to take a long time" - Cathie

"A lot of the times, I just want unit dose" - Richard

REPORTING ISSUES

6 Report Titles

Several users were frustrated that they could not edit the report name. Some did not realize the title field was editable and entered titles in the description field.

Severity

High

Recommendations

Add an indicator showing that the title field is editable.

The screenshot shows a web interface for configuring a report titled "Controlled Substance Invoices". At the top, there is a back arrow and the title. Below the title is a text input field with the placeholder "Enter a description for this report". On the left side, there is a vertical navigation menu with the following items: "Report Type" (highlighted with a blue bar), "Date Range", "Accounts", "Filters", and "Column Layout". The main content area on the right is divided into two sections. The first section is titled "Report Type" with the instruction "Select a report type" and contains two buttons: "Purchases" (highlighted in blue) and "Accounts" (light blue). The second section is titled "Date Range" with the instruction "Select a date range for your report" and contains a date picker input field with a calendar icon and the text "Select a date".

"That (title) doesn't look like it's changeable" - Jill

"Okay, I don't see a report name" - Robert

7 Column Layout

Several users expressed difficulty changing column layout, and attempted to drag column in report preview section but navigated too quickly.

Some users clicked Product Description in the column layout section to attempt to move it.

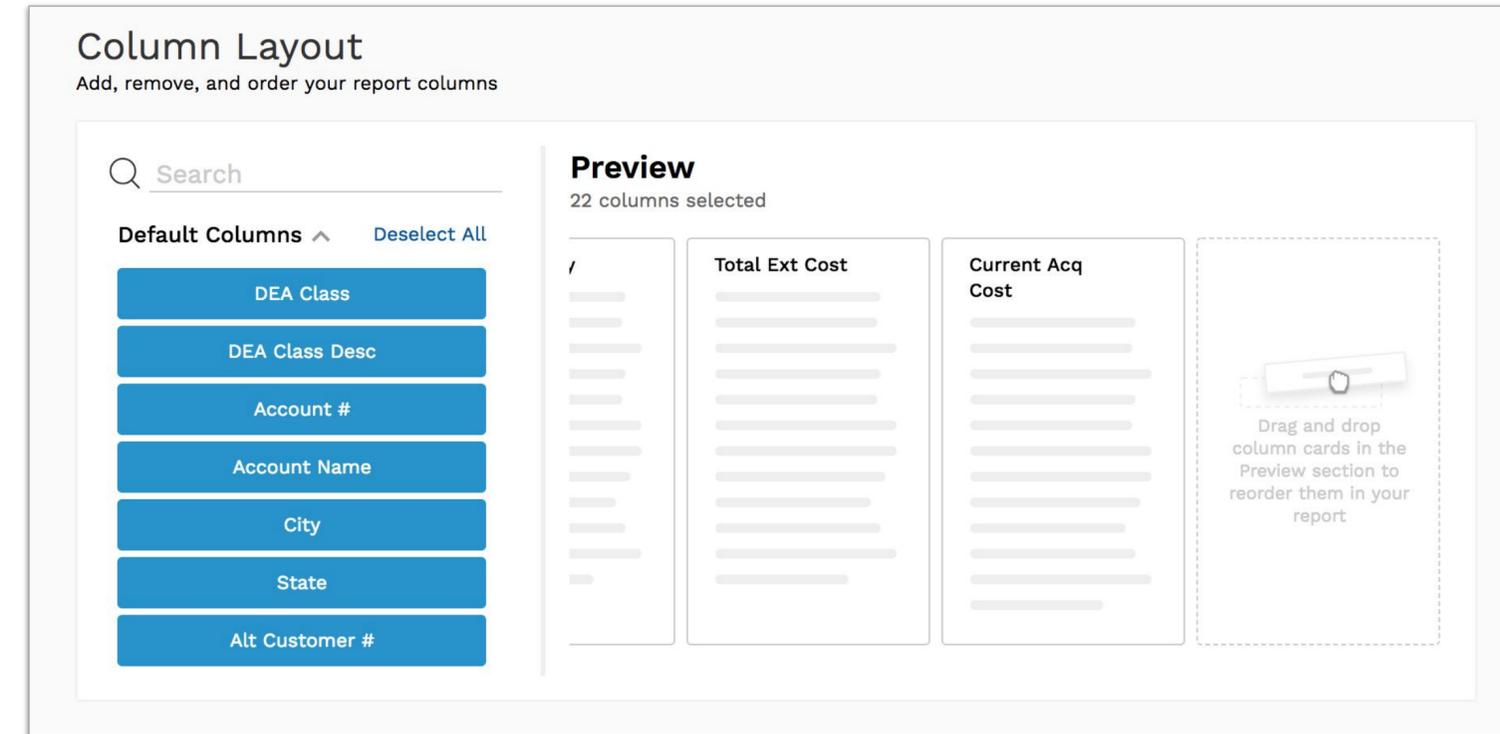
Severity

Medium

Recommendations

Consider enabling drag and drop functionality from left pane (“Default Columns”).

"Once you know that, it will be easy, Intuitive, it was not" (on how to move columns) - Cathie



8 Filters

Users are struggling to use report filters.

Severity

Low

Recommendations

- Consider making “Contains” default operator.
- Change “Equal To” to “Is Exactly”.

The screenshot shows a 'Filters' panel with the subtitle 'Add filters to narrow your report results'. In the top right corner, there are links for 'IMPORT SMART FILTER' and '1 Applied Filters'. The main area contains a filter configuration row with three dropdown menus: 'Product Description', 'Equal To', and a text input field containing 'Claritin'. To the right of the text input is a 'LOOKUP' button. Below the filter configuration is a blue button with a plus sign and the text 'Add Filter'.

"I don't understand what it's trying to tell me here. This is not intuitive" (having difficulty selecting the product description column) - Cathie

"I was trying to figure out how to pull up Claritin, but that's not what I wanted to do" - John

"How do I filter just Claritin?" - John

APPENDIX

1 Discussion Guide

Includes pre-task screening questions and specific tasks tested for Ordering, Receiving, and Reporting

Ordering

We're going to set the stage... You're a Buyer at *Hospital - Main Campus* and just arrived at work. You'll need to place a few orders today across the 2 facilities and 6 accounts you manage. Does this make sense?

| Task # | Functionality Tested | Prompt |
|--------|--|--|
| -- | | This is the home screen when you log in to ABC Order. Before we jump into specific tasks, what do you see here? How might you get started with some of your common ordering duties? |
| 1 | <ul style="list-style-type: none"> Catalog search | First, find a list of Tylenol products to choose from. What do you see/understand? |
| 2 | <ul style="list-style-type: none"> On contract filter | Next, find Tylenol products that are on contract for <i>Hospital - Main Campus</i> . |

2 Airtable Notes

Includes observations, insights, and customer profiles

| Name | Participant | Task | Type |
|--|----------------|---|--------|
| INSIGHTS | | | |
| Confusion about price display Count 2 | | | |
| 240 "I don't know how to tell if that would be the cheapest one" | Participant 12 | Tylenol search | Quotes |
| 240 "I don't know where I would see the actual cost that I would pay" | Participant 19 | Tylenol search | Quotes |
| INSIGHTS | | | |
| Difficulty finding add note button Count 3 | | | |
| 241 "More details?" - struggling to find where to leave a note | Participant 17 | Product note | Notes |
| 242 Scrolls around product details page and clicks on edit formulary - checks off GPO and 340B a... | Participant 17 | Product note | Notes |
| 243 Then clicks into the product and selects edit formulary, then exits after not seeing where to le... | Participant 9 | Product note | Notes |
| INSIGHTS | | | |
| Lookup button on reports being used after text is already entered Count 3 | | | |
| 244 In filters, selects for "product description" to "contain" "Claritin" - selects Lookup and types in... | Participant 10 | Create report from scratch (Claritin last m | Notes |
| 245 Selects product description "starts with" "claritin" - presses lookup and shows confusion abo... | Participant 16 | Create report from scratch (Claritin last m | Notes |
| 246 She types in claritin in the search box, then clicks lookup and expects it to look up there | Participant 6 | Create report from scratch (Claritin last m | Notes |

3 Highlight Reels

Short clips of users experiencing common successes and issues

