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| Form Approved  OMB No. 0935-XXXX  Exp. Date XX/XX/20XX |

Patient and Caregiver Usability Interview

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| Public reporting burden for this collection of information is estimated to average XX minutes per response, the estimated time required to complete the survey. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to: AHRQ Reports Clearance Officer Attention: PRA, Paperwork Reduction Project (0935-XXXX) AHRQ, 5600 Fishers Lane, # 07W41A, Rockville, MD 20857. |

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| **1.0 Usability Testing Scope** **Objective** |
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| This testing guideline will focus on the patient/caregiver -facing application.  This testing guideline will focus on the perspective of the treating clinician or team when managing patient data from multiple sources. Priority areas to focus on will be presentation of information and issues of aggregating and prioritizing data.  This testing guideline will focus on submitting responses to in-app questionnaires |

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| **2.0 Usability Testing Assumptions and Constraints** |
| **Assumptions** |
| Testers have access to a current version of the application at Oregon Health and Science University.  Navigation, number of clicks and time spent in application will be captured in log data.  The questions and tasks listed under each usability test are not meant to be read/reviewed verbatim. They are meant to provide an initial skeleton to guide the interaction.  The observer should encourage the patient to think aloud as they are navigating the application(s). |
| **Constraints** |
| Some data will not display, this guideline should try to address this constraint.  Data that will be available in the final version of the application may not be available in the version of the application tested.  The applications cannot write to the EHR. Clinicians and patients/caregivers are unable to edit the data contained in the EHR through the eCare Plan application. |

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| **3.0 Usability Testing Risks** | | | |
| **Description** | **Probability**  High|Med|Low | **Impact**  High|Med|Low | **Mitigation** |
| User cannot access the applications in the production site or the live site. | Low | High | Confirm access and credentials prior to testing |
| User cannot access data in external system when such data is present. | Medium | Medium | Confirm access and credentials prior to testing |

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| **4a.0 Usability Testing Team Roles & Responsibilities** | | | |
| **Name** | **Roles** | **Responsibilities** |  |
| Gina DeNoble | Interviewer | Schedule and conduct evaluation sessions |  |

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| **4b.0 Participating Patient Information** | | | |
| **Name** | **Location of Testing** | **Patient is comfortable using technology**  1-5 with 1 [strongly disagree], 2 [disagree], 3 [neutral], 4 [agree], and 5 [strongly agree] | **Patient is experienced with using care planning apps** **1-5 with 1 [strongly disagree], 2 [disagree], 3 [neutral], 4 [agree], and 5 [strongly agree]** |
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| **5.0 Usability Testing Introduction** | |
| **ID** |  |
| 5.0 | **Introduction:**  Before getting started, provide the participant with a brief overview:    **(**OBSERVER READ ALOUD) Thank you for taking the time to meet with us today. I am [OBSERVER NAME] and will be guiding you through your review of the apps. We will also be taking notes. The goal of today’s application review is to get your initial impression of the eCare plan application.    Today’s session will take about one hour. We will begin with an overview of four major concepts: shared care planning, care planning, care coordination and shared decision-making, and discuss your initial thoughts. After, you will review the patient-facing application with your own data and make some changes. As we move through each section, please say whatever comes to mind to help us understand how to improve your experience.  Concept Definitions:  **Shared care planning**1 - process of collaboration among people at risk for or living with MCC, clinicians, and healthcare teams to proactively discuss and record: (1) roles and tasks among care team members, including the individual, their family and caregivers; (2) plans for coordinating care within and across organizations and settings; (3) strategies for supporting and empowering patients to manage their own health; (4) plans for engaging in shared decision making.  **Care planning** - a collaborative process focused on discussing patient and clinical goals of care, conducting shared decision-making to identify strategies for clinical and self-management to achieve these goals based on evidence and patient preference, clarifying roles for different members of the care team, and empowering patients and caregivers  **Care coordination** - organization of patient care activities to facilitate appropriate and timely delivery of healthcare services by multiple clinicians in multiple care settings  **Shared decision-making** - when a health care provider and a patient work together to make a health care decision that is best for the patient |
| 5.1 | **Privacy:**  Your participation is completely voluntary. Your name and title will not appear in any report. There are no right or wrong answers, and we are interested in your observations for how to make the applications better. Are there any questions before we begin? (You may also stop at any point in the testing to ask questions). |
| 5.2 | **Introductory questions:**  Let’s start with the purpose of the eCare plan app. Our goal is to improve process of care planning between patients/caregivers, and clinicians, regardless of treatment location. When we say “care planning”, we mean how do we access and prioritize critical next steps, and how does one plan or priority impact another? For example, imagine a hypothetical patient who (Patricia Noelle bio). Would you mind sharing which institutions you receive care from? |
| 5.2a | When you think about the care you want to receive or the goals you have for your own health, how much of that is understood by your doctors at OHSU? Outside OHSU? What makes you say so?    What information would you want your doctor to know before your next appointment?  What would help ensure your doctor(s) consider your goals and preferences?    If they are unsure/unable to come up with items right away:    These can be technical, like clinician contact information for questions, or they can be social, like the importance of a trusted relationship with your clinician.    As we go through the app later, there will be plenty of opportunities to see what is already available and reflect on what might be helpful for care planning. |
| 5.2b | As you can tell, this is an ongoing process. Your input will help us expand and refine this app. Once we have an improved version, we’d like to hear your perspective again.    Would you be willing to participate in a test similar to this one later? |
| 5.2c | Next, you’ll log into the app, and then I will review some slides with you which go over the testing process. This is informal and conversational, but it’s best if you keep your health information private during the conversation. Accordingly, I will not be able to see your screen as we go through the testing process, so please think out loud wherever possible. |
| 5.3 | Entry Criteria (OBSERVER ASSIST WITH COMPLETING THESE STEPS)    Before completing the Test Cases the user must perform the following to access the application and the test patient.     1. Log into MyChart PROD Environment*.*      1. Navigate to Messages. Open the message title “eCare Plan Test.” Click on the link to open the eCare Plan Application.     After successful log in to the app, **review the eCP Patient Overview PowerPoint**:    As we review the app, please share with me which information you would share with your doctor when discussing goals and concerns about your care (and why).    The patient-facing application contains the following sections:   * Goals * Concerns * Meds * Activities * Health Status * Team   [NOTE: TBD Variant of these steps should be repeated for patient user to log into any other relevant Health System EHRs to review data from those sources as well.]  Now that you’ve had a chance to test this app, how might you use this it at your next doctor’s appointment? |

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| **6.0 Usability Testing** | |
| **ID** | **Test Cases** |
| 6.0 | Usability Testing Sections:   * Test 1. Load data from additional source (if applicable) * Test 2. Adjudicate data from multiple sources (if applicable) * Test 3. Review Goals, add a new goal * Test 4. Review Activities * Test 4. Review Care team * Test 5. Review Medications * Test 6. Review Vital signs and lab results * Test 7. Review Health concerns     **Observer to Note Rough Start Time: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**    **Observer to Note Rough End Time: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |