IA FINAL PRESENTATION

CONNECTICUT GASTROENTEROLOGY CONSULTANTS, PC

ctgastro

FRANCESCA PANULLO

BUSINESS GOALS

USER NEEDS

After discussing with the current stakeholders and business owners developed these as the main objectives

Previous research with interviews, surveys and usability tests determined what was most important to patient when using portals which is similar to the patient website. Also, getting demographics from the doctor about their patients I was able to triangulate what there needs were

1 Communicate tutorials/Informational videos for patient care

2 Grow patient relationships by including more about the doctors, do introduction videos about company and procedures to get to them know personally

3 Increase retention to patients who are existing customer

4 Increase conversion to new patients attract new patients

5 Decrease workload with Q+As to cut down on phone calls and workload. Have a directory in the FAQ system to easily find answers

1 Check to see if insurance is covered

2 Reviews of current doctor and practice

3 Online booking and scheduling

4 Prescription Refills online

5 Blood work and test results online

Link to Patient Survey   Link to: Patient Usability

INTRODUCTION	CARD SORTING	TREE TESTS	SITEMAP	COMPETITIVE ANALYSIS	WIREFRAMES & NAVIGATION	KEY TAKEAWAYS

Objectives | Personas | Site Audit | Tasks

PERSONA 1: NEW PATIENT

THE INSQUISTOR

Julie Shaw

"I want to be able to manage my health without disrupting my life"

Main Goal:

I want to be able to book appointments on the go whenever and wherever I am. So I can spend less time worrying about managing my health and back to focusing on my career.

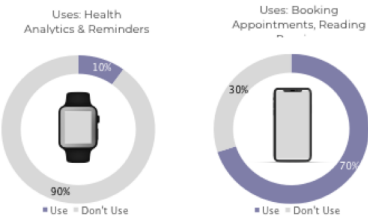| Age: 27 | Sales Manager at Startup | Single | San Francisco, CA |

Desired Features

👍 Easy way to find if doctors are covered by insurance plan

👍 Doctor nearby

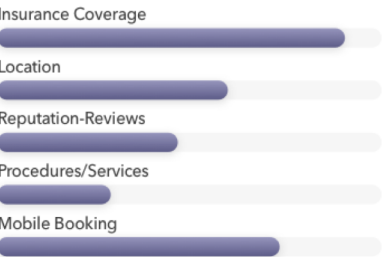👍 Doctor with positive reviews

👍 Payment and login through existing apps

Dislikes

👎 Sites that aren't mobile-friendly

👎 Filling out forms by hand, having to print them out

👎 Being on hold to schedule an appointment

Technology Use

Uses: Health Analytics & Reminders

10%

90%

■ Use ■ Don't Use

Uses: Booking Appointments, Reading R...

30%

70%

■ Use ■ Don't Use

Motivations

Insurance Coverage

Location

Reputation-Reviews

Procedures/Services

Mobile Booking

PERSONA 2: RECURRING PATIENT

THE LOYALIST

Michael Bennet

"I believe in person-to-person relationships I rely on my friends recommendations not what I read online"

Main Goal:

I want an easier way to pay and book appointments online. As well as see my test results. So I can spend less time on the phone and more with my family.

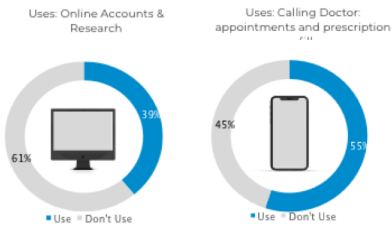| Age: 60 | Mechanical Engineer at Ford | Married with grandkids | Cleveland, Ohio |

Desired Features

👍 Receive reminders about prep for procedures

👍 Order prescriptions without having to call the office

👍 Easily review blod test and health records

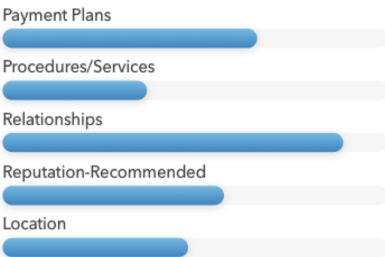👍 Automated appointment reminders added to his calendar

Dislikes

👎 Learning how to use patient portal

👎 Remembering all the things he needs to do for prep before a procedure

👎 Having to check one account for billing and another for his blood tests

Technology Use

Uses: Online Accounts & Research

61%

39%

■ Use ■ Don't Use

Uses: Calling Doctor: appointments and prescription fill

45%

55%

■ Use ■ Don't Use

Motivations

Payment Plans

Procedures/Services

Relationships

Reputation-Recommended

Location

INTRODUCTION	CARD SORTING	TREE TESTS	SITEMAP	COMPETITIVE ANALYSIS	WIREFRAMES & NAVIGATION	KEY TAKEAWAYS

Objectives | Personas | Site Audit | Tasks
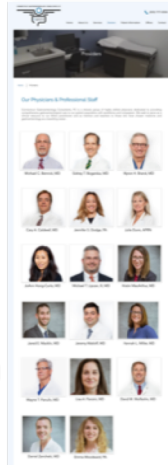
SITEMAP ORIGINAL TREE

Homepage

About Us

Offices

Doctors

Contact Us

Patient Info

New Haven

Guilford

Hamden

Insurance

Patient Forms

Procedure Prep

FAQ

Office Hrs & Cancellation

Patient Education

INTRODUCTION	CARD SORTING	TREE TESTS	SITEMAP	COMPETITIVE ANALYSIS	WIREFRAMES & NAVIGATION	KEY TAKEAWAYS

Objectives	Personas	Site Audit	Tasks

BUSINESS TASKS

1. Find service offerings, screenings and information about procedures *
2. Find directions to the closest office *
3. See the company accreditations/certifications/awards *
4. Read FAQ for clarification *
5. Read and write reviews about the offices and location *
6. Read and write reviews of the doctor *
7. Read about the prep you need for your procedure *
8. Fill out forms before you visit *
9. Read about doctors certifications and specialties *
10. Find hours of availability *
11. Find companies email *
12. Look up information about your condition and how to manage it *
13. Read articles & watch informative videos *
14. Follow the company on social media ~
15. Stay informed about company events and news ~
16. See affiliated hospitals the company works with *
17. Sign-up to schedule an appointment *
18. Set reminders of when to take your prep for procedures ~
19. Find information about cancellation policies *

USER TASKS

20. Book appointments and procedures ~
21. Enter your insurance to see if its covered and see which insurances the company accepts *
22. Refill your prescriptions online ~
23. Review your payment options ~
24. View your statements and pay your balance ~
25. See the doctors schedule ~
26. Email your doctor ~
27. Get live customer support & message customer service ~
28. Get reminders about your upcoming appointment ~
29. See lab and procedure results ~
30. Login to your account ~

High Priority

Med Priority

* New Patient

~ Recurring Patient

METHODOLOGY, DEMOGRAPHICS, OUTCOMES
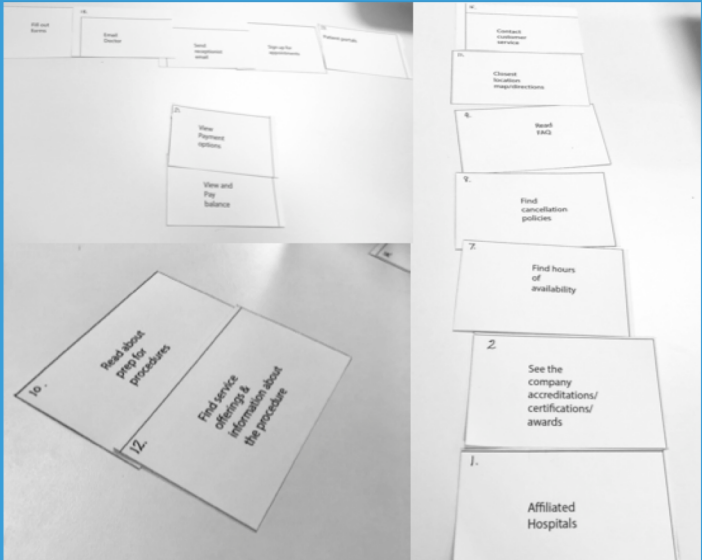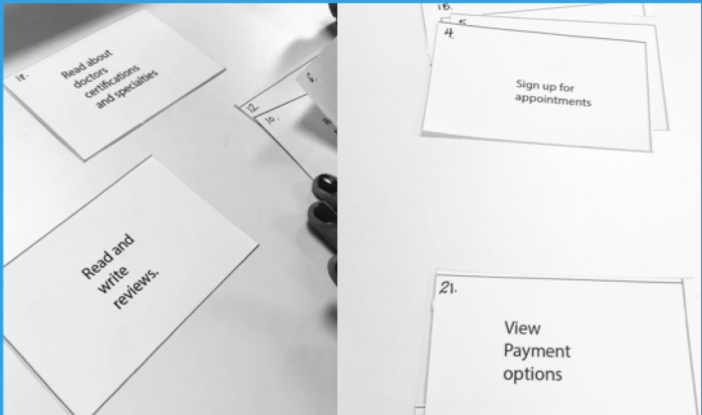
64%
Participants created **4-6 categories**

50%
of participants were between 25-36 years old and 29% were 57-77 years old

6
(of 14) **43%** Participants were from California

14
Total participants **13 remote** participants **1 moderated** participant

92%
Participants see **specialists 1-2 times a year** and a **general doctor 1-4 times** a year

28
Total tasks were asked to complete, taking on average **14 min 30 sec was** to complete

Overview | Tasks | Categorization &Standardization | Takeaways

CARD SORTING TASKS

1. Affiliated Hospitals
2. Company Accreditations/Awards
3. Condition Management
4. Sign-up for visit
5. Forms
6. Insurance Coverage
7. Cancellation Policies
8. FAQ
9. Procedure Prep
10. Office Locations
11. Find service offerings, screenings and information about procedures
12. Articles & Videos
13. Company Events & News
14. See the doctors schedule and email
15. Message Customer Support
16. Find hours of availability and companies email

** Paraphrased tasks minus the ones that were problematic for full tasks go to slide #5

17. Doctors Certifications & Specialties
18. Social Media
19. Reviews of Doctor
20. Payment Options
21. Statements & Pay Balance
22. Account Login
23. Lab & Procedure Results
24. Procedure Prep Reminders
25. Appointment Reminders
26. Book Appointments & Procedures
27. Prescription Refill
28. Office & Company Reviews

MODERATED TASKS WRITE-IN

11a. Find information about the procedure
11b. Find service offerings
14a. Email Doctor
14b. Find Doctor Schedule
16a. Find companies email
16b. Find hours of availability

■ User wrote in tasks that they thought should be separated in moderated card sort

■ Same tasks user wrote in during moderated testing 2 other remote users commented to separate

Next test separate tasks #11, 14, and 16. Make tasks only perform one action.

Overview | Tasks | Categorization &Standardization | Takeaways

HEADERS-MAIN CATEGORIES

	Appointments	Account Information	About Us	Procedures	Payment	News & Articles
Participants	64%	50%	43%	36%	36%	21%
Agreement	37%	47%	44%	60%	60%	77%
Groupings	Scheduling/Setting Appointments, Prepare, Schedule	Account Information/Info, My Account/My Profile/My Portal	About Us/About/About Doctor & Office	Procedures/Patient Procedures	Payment/Insurance, Payments, Patient Portal, Financial	Articles & News, Updates/News
Different Cards	19	11	17	6	4	2-3
Unique Cards	4-12	3-7 not enough frequency for each task	5-17	2-5	2-3	N/A

Link to: <u>All Tests</u>

INTRODUCTION	CARD SORTING	TREE TESTS	SITEMAP	COMPETITIVE ANALYSIS	WIREFRAMES & NAVIGATION	KEY TAKEAWAYS

Overview	Tasks	Categorization &Standardization	Takeaways

POTENTIAL ISSUES & INVESTIGATIONS

ISSUES

- Too complex of tasks need separate tasks
- Prompt understanding
    a. 2 users had issues understanding prompt based on categories
    b. 1 user: separate tasks into categories of what they use or do
    c. 1 user: believes would find information in all sites not just doctor site,
- **Issues of Remote Testing:** Subcategories not a feature but pertinent to have since during moderated testing user created several subcategories

SOLUTIONS

- Open sort with corrected complex task and separated tasks based on first card sort test
- Open Sort with prompt a bit clearer to users that testing website (not what they use or where they think information would be on any site)
    a. Users responses to some were "use all the time" use "often"

FURTHER STUDIES

- **Open card sort with tasks**: Open sort with options for users to:
    - Separate tasks into multiple categories
    - Duplicate tasks and put into more than one category
    - Add subcategories
- **Open card sort with summary word selection**:: for what each tasks shows, and then categorize these summaries
- **Closed Card Sort**: with main categories selected
- **Open card sort with titles instead of task names**: Run content test and then have them group content into categories instead of tasks

TASKS TREE TEST 1 & 2

1. Service offerings, procedures
2. Office Locations
3. Company Accreditations
4. FAQ
5. Doctor Certification/Specialties
6. Doctor Reviews
7. Procedure Prep
8. Forms
9. Insurance Coverage
10. Schedule Visit
11. Availability Hours

* Paraphrased to contain titles instead of tasks (for full tasks go to slide #5)

TASKS TREE TEST 2

1. Affiliated Hospitals
2. Condition Management
3. Cancellation Policies
4. Articles & Videos
5. News & Events
6. Doctors Email
7. Message Customer Support
8. Social Media
9. Payment Plans & Options
10. Statements & Balance
11. Lab & Procedure Results
12. Procedure Prep reminders
13. Appointment Reminders
14. Prescription Refill
15. Book Appointments & Procedures
16. Company Reviews
17. Procedure Information
18. Companies Email
19. Doctors Schedule

OVERVIEW

TESTS	TREE TEST #1	TREE TEST #2
OVERALL SUCCESS	45%	60%
	4.45	9
QUESTIONS OVER 50%	8/11 questions incorrectly	5/30 incorrectly
T1 vs T2 RANKING	Form	Higher All other tests
	Email Office	
NAVIGATION & CATEGORIZATION	Wide & Shallow Navigation	Narrow & Deep Navigation
DIRECTNESS	58%	74%
PARTICIPANTS	10	15
AGE	30% in each group: 18-24, 47-57, 57-77	N/A
LOCATION	More than one participant in only 2 locations: California & New York	33% California and that was majority
MOST IMPORTANT WHEN SEEING DOCTOR	50% thought Insurance Coverage most important when seeing doctor	27% valued reviews from other patients while 40% (20% each category) valued insurance coverage and valued referrals from other friends/family/current physician

Tasks for Tests   Overall   Abstract Structure #2   Takeaways

ABSTRACT STRUCTURE AFTER SCORECARD & TREE TEST #2

HOMEPAGE
3	Condition Management
17	Social Media
10 & 27	Service Offerings & Screenings & Procedures
2	Company Accreditations/Certifications
27	Company Reviews
24 & 30	Book Appointments/Procedure
5	Insurance Coverage

Contact Info
14	Message Customer Service
9	Office Locations
15	Availability Hours
28	Email Company
	Company Phone Number

ABOUT US
17	Social Media
1	Affiliated Hospitals
10 & 27	Service Offerings & Screenings & Procedure
24 &30	Book Appointments/Procedure
29	Find a Doctor

Contact Info
9	Office Locations
15	Availability Hours
28	Email Company

Accreditations
27	Company Reviews
18	Doctor Reviews
2	Company Accreditations/Certifications

CONTACT US
14	Message Customer Service
9	Office Locations
15	Availability Hours
28	Email Company
1	Affiliated Hospitals
	Company Phone Number

APPOINTMENTS & POLICIES
24 & 30	Book Appointments/Procedure
6	Cancellation Policies
4	Forms
29	Doctors Schedule
25	Get reminders About your upcoming Appointments
19	Payment Plans
5	Insurance Coverage
7	FAQ
2	Company Accreditations/Certifications
18	Doctor Reviews
27	Company Reviews

OUR SERVICES
10	Service Offerings & Screenings
9	Procedure Prep
24 & 30	Book Appointments/Procedure
27	Procedure Information
	Specialities
1	Affiliated Hospitals
	FAQ

PAYMENT & INSURANCE
PAYMENT
| 20 | View & Pay Balance |
| 19 | Payment Plans |

INSURANCE
| 5 | Insurance Coverage |

CARE TEAM
	Doctors
	Nurses
16	Doctors Certifications
16	Doctors Specialities
16	Doctors Education
29	Doctors Schedule
13	Email Doctor
	Doctors Phone
18	Doctor Reviews
24 & 30	Book Appointments/Procedure

SUPPORT
14	Message Customer Service
28	Email Company
	Company Phone Number
	Community Forum

FAQ
| 7 | FAQ |

NEWS & EVENTS
11	Articles & Videos
12	Newsletters & Events
17	Social Media
	Blogs

EDUCATION
11	Articles & Videos
3	Condition Management
7	FAQ
27	Procedure Information
9	Procedure Prep
10	Service Offerings & Screenings

MY ACCOUNT
25	Prescription Refills
21	Lab & Procedure Results
24 & 30	Book Appointments/Procedure
6	Cancellation Policies
4	Forms
29	Doctors Schedule
	Doctor email
	Doctor Phone number

Reminders
| 23 | Appointment & Procedure Reminders |
| 22 | Procedure Prep Reminders |

Patient Education
| 3 | Condition Management |
| 27 | Procedure Informatoin |

PAYMENTS
19	Payment Plans
20	View & Pay Balance
5	Insurance Coverage

Legend
- Both Importance
- Company Importance
- Patient Importance
- Not of highest important

Link to: All Tests (to see larger version and first abstract structure)

TREE TEST ANALYSIS

1. **Tree Test #2 outperformed Tree Test #1** however there were two tasks in which the first tree test did more successful.
   - **"Email company"** most went to "About Us" instead of "Contact US"
   - **"Book an appointment"** participants went to multiple places
2. "**About Us"** page seems to be the place where most people go for a lot of things (contact, review, location, doctors) about everything this is seen in the card sorting as well as in the second tree test
3. "**Community"** in **"Support & Community"** posed some issues since people thought this would also be where the blog was and events, social media, and reviews.
4. **Expectations of doctor schedule** to be in appointment and booking and while it is, it not necessarily visible until you enter form fields.
5. **Message Customer Support** task participant rarely went to "Support and Community"
6. **Email Doctor**: Participants went to "Contact Us" instead of "Doctors" page

RECOMMENDATIONS

1. Underperforming tasks in Tree Test #2:
   - Place **"Contact Us"** in **"About Us"**
   - Book an Appointment: **Rethink phrasing** of the task oddly worded in Tree Test #2 vs Tree Test #1
2. **Subcategories of "Doctors" in the About Us** page
3. **Remove "Community"** in Support & "Community"
4. **"Appointment & Policies"** needs to include **doctors schedule in progressive step-by-step** modal when booking
5. Consider putting **"Message Customer Support" in to the "contact us" page**
6. May need to consider **putting link or sub navigation within the "contact us" to the doctors page** so patients can access email.
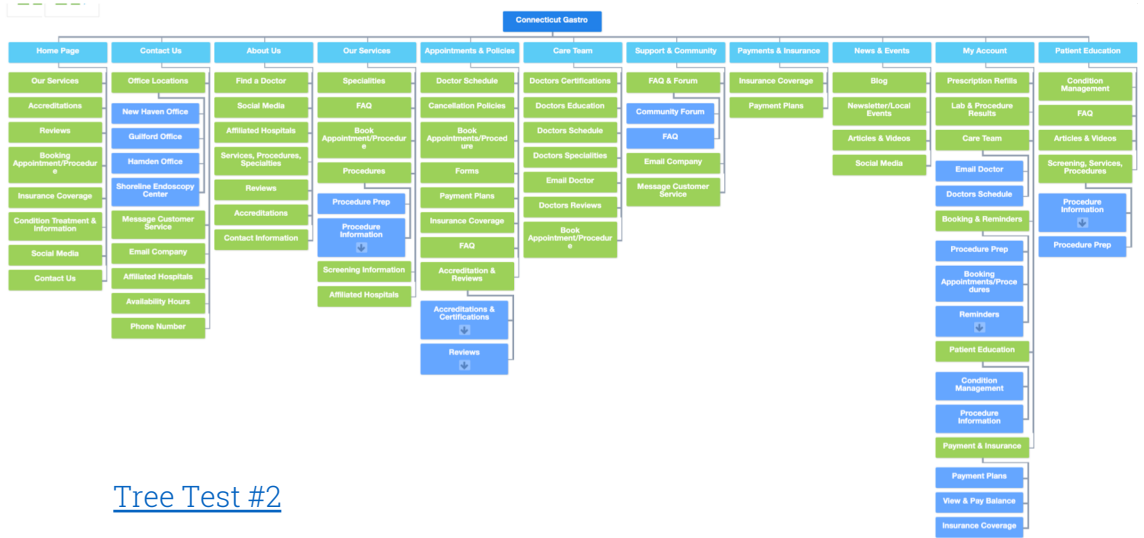
Tree Tests

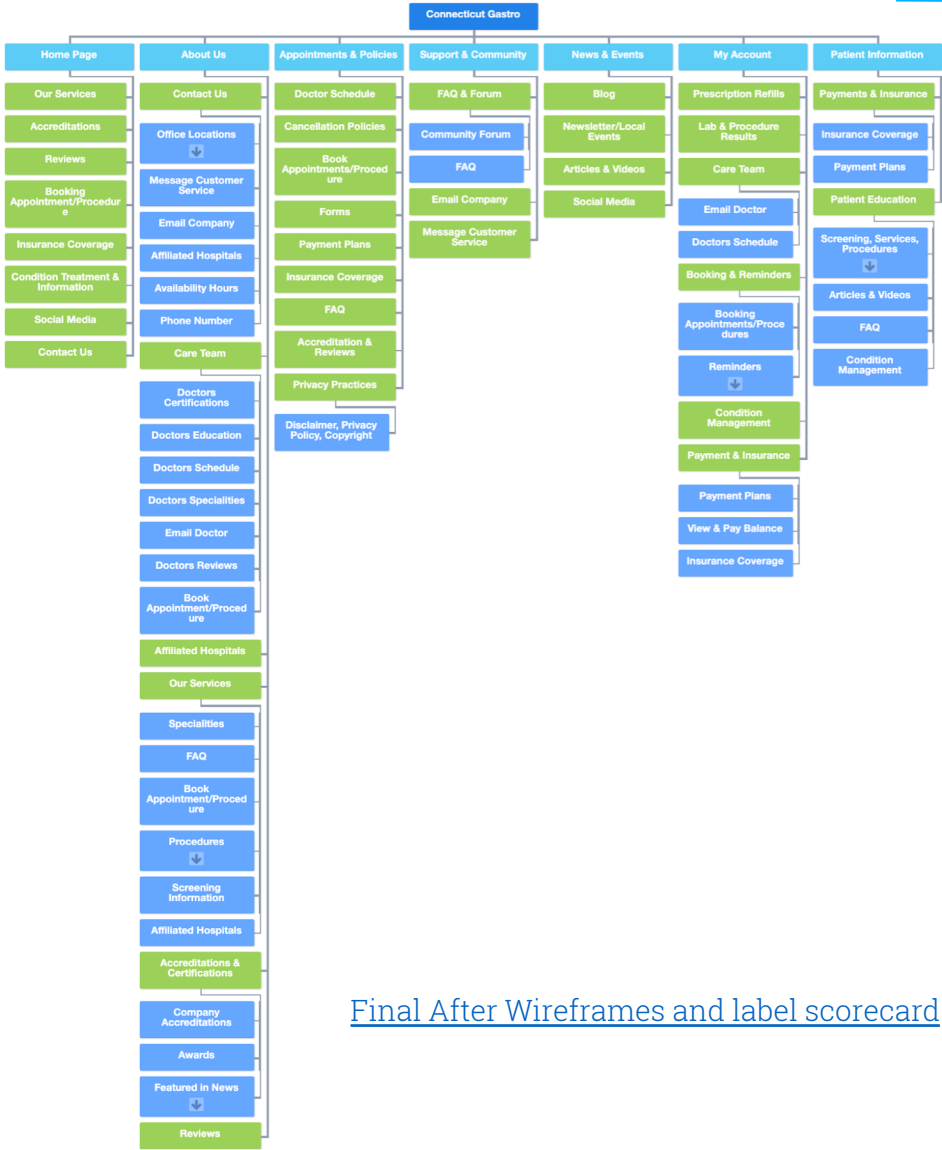After Scorecard & Wireframes

TREE TEST #2

TREE TEST #2

Tree Test #1

Tree Test #2

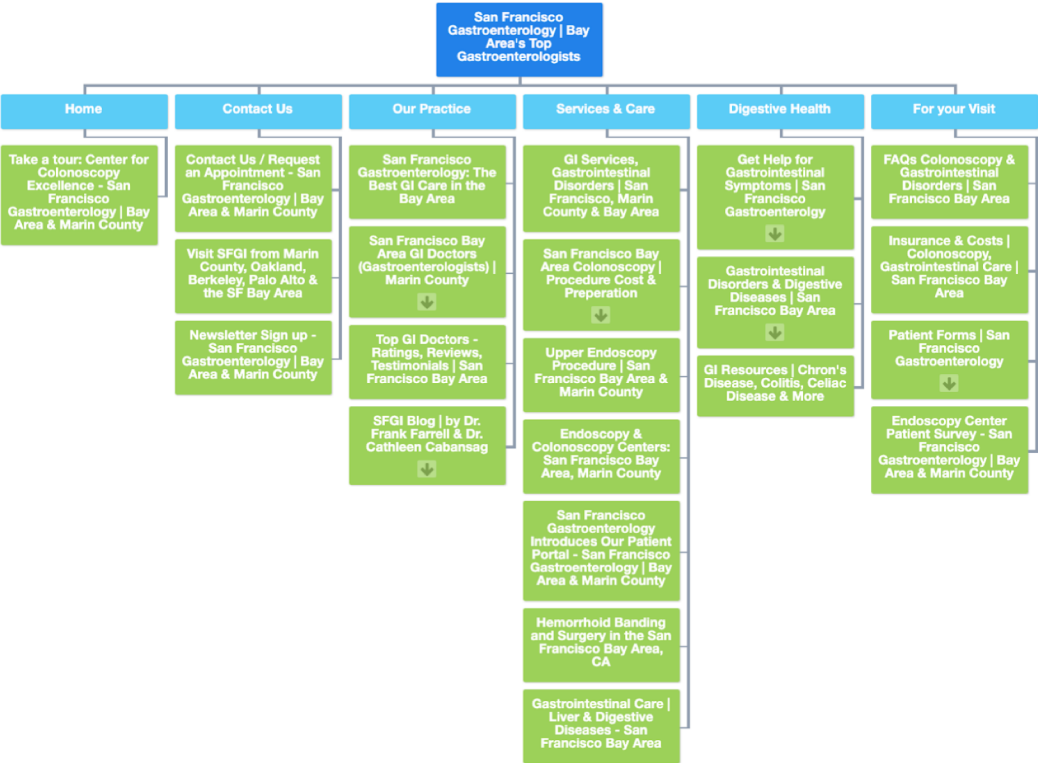Tree Tests

After Scorecard & Wireframes

Connecticut Gastro

Home Page
- Our Services
- Accreditations
- Reviews
- Booking Appointment/Procedure
- Insurance Coverage
- Condition Treatment & Information
- Social Media
- Contact Us

About Us
- Contact Us
- Office Locations
- Message Customer Service
- Email Company
- Affiliated Hospitals
- Availability Hours
- Phone Number
- Care Team
- Doctors Certifications
- Doctors Education
- Doctors Schedule
- Doctors Specialities
- Email Doctor
- Doctors Reviews
- Book Appointment/Procedure
- Affiliated Hospitals
- Our Services
- Specialities
- FAQ
- Book Appointment/Procedure
- Procedures
- Screening Information
- Affiliated Hospitals
- Accreditations & Certifications
- Company Accreditations
- Awards
- Featured in News
- Reviews

Appointments & Policies
- Doctor Schedule
- Cancellation Policies
- Book Appointments/Procedure
- Forms
- Payment Plans
- Insurance Coverage
- FAQ
- Accreditation & Reviews
- Privacy Practices
- Disclaimer, Privacy Policy, Copyright

Support & Community
- FAQ & Forum
- Community Forum
- FAQ
- Email Company
- Message Customer Service

News & Events
- Blog
- Newsletter/Local Events
- Articles & Videos
- Social Media

My Account
- Prescription Refills
- Lab & Procedure Results
- Care Team
- Email Doctor
- Doctors Schedule
- Booking & Reminders
- Booking Appointments/Procedures
- Reminders
- Condition Management
- Payment & Insurance
- Payment Plans
- View & Pay Balance
- Insurance Coverage

Patient Information
- Payments & Insurance
- Insurance Coverage
- Payment Plans
- Patient Education
- Screening, Services, Procedures
- Articles & Videos
- FAQ
- Condition Management

[Final After Wireframes and label scorecard](#)

ANALYSIS | Takeaways

WIREFRAMES FROM HOMEPAGES

SITEMAP: SF GASTRO

San Francisco Gastroenterology | Bay Area's Top Gastroenterologists

Home
- Take a tour: Center for Colonoscopy Excellence - San Francisco Gastroenterology | Bay Area & Marin County

Contact Us
- Contact Us / Request an Appointment - San Francisco Gastroenterology | Bay Area & Marin County
- Visit SFGI from Marin County, Oakland, Berkeley, Palo Alto & the SF Bay Area
- Newsletter Sign up - San Francisco Gastroenterology | Bay Area & Marin County

Our Practice
- San Francisco Gastroenterology: The Best GI Care in the Bay Area
- San Francisco Bay Area GI Doctors (Gastroenterologists) | Marin County
- Top GI Doctors - Ratings, Reviews, Testimonials | San Francisco Bay Area
- SFGI Blog | by Dr. Frank Farrell & Dr. Cathleen Cabansag

Services & Care
- GI Services, Gastrointestinal Disorders | San Francisco, Marin County & Bay Area
- San Francisco Bay Area Colonoscopy | Procedure Cost & Preperation
- Upper Endoscopy Procedure | San Francisco Bay Area & Marin County
- Endoscopy & Colonoscopy Centers: San Francisco Bay Area, Marin County
- San Francisco Gastroenterology Introduces Our Patient Portal - San Francisco Gastroenterology | Bay Area & Marin County
- Hemorrhoid Banding and Surgery in the San Francisco Bay Area, CA
- Gastrointestinal Care | Liver & Digestive Diseases - San Francisco Bay Area

Digestive Health
- Get Help for Gastrointestinal Symptoms | San Francisco Gastroenterolgy
- Gastrointestinal Disorders & Digestive Diseases | San Francisco Bay Area
- GI Resources | Chron's Disease, Colitis, Celiac Disease & More

For your Visit
- FAQs Colonoscopy & Gastrointestinal Disorders | San Francisco Bay Area
- Insurance & Costs | Colonoscopy, Gastrointestinal Care | San Francisco Bay Area
- Patient Forms | San Francisco Gastroenterology
- Endoscopy Center Patient Survey - San Francisco Gastroenterology | Bay Area & Marin County

ANALYSIS | Takeaways

TAKEAWAYS

HOMEPAGE

ABOUT US-CONTACT US

1. **Labelling Commonalities**
   a. Main Nav.
      ■ Home
      ■ About Us
      ■ Care Team/Doctors
      ■ Procedures
      ■ Conditions
      ■ Patient Resources
2. **Navigation Commonalities**
   a. Header: Login & Social Media
   b. Main Nav: 4-5 menu options with dropdown selections
3. **Sub-navigation**
   a. Full width Hero image with carousel indicators
   b. Cards in deck (3-4) with CTA/icons
   c. Sections
4. **Content Types**
   a. Forms, Portal, Modals
   b. CTAs , Icons, Images , Cards
   c. Links , Articles , Videos
   d. Q+A ,Forums
5. **Layouts Inspired**: by the competitive wireframes to help gauge placement and prioritization

Sitemap Ideation: Additional Sitemap Ideas and ideation about layout in PROCESS BOOK

Nav. Bars

Components & Pages

NAV BAR

SECONDARY NAV

FOOTERS

SIDEBAR

SNACKBAR

Competitor: Centura Health (5 Main Categories)
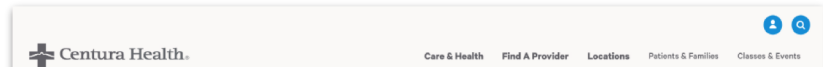
Wireframe: Condensing 9 categories into 5 main elements

Competitor: Rush Medical utilize search bar
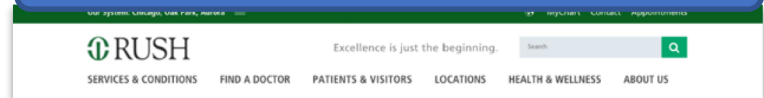
Wireframes: With Search Bar Options
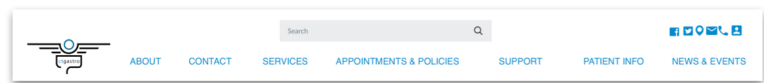
SECONDARY NAV: ABOUT US

Horizontal Drop Down
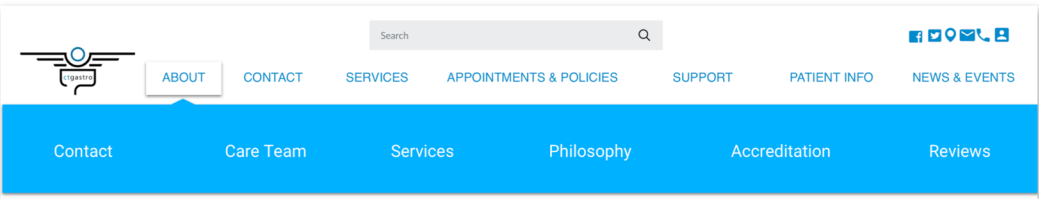
Vertical Drop Down
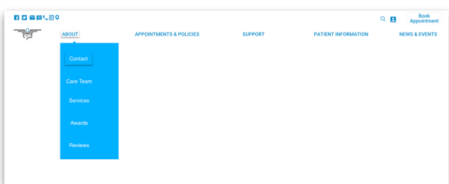
Current Site: Footer
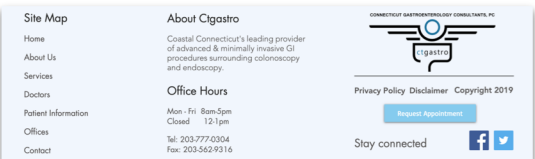
Med-Lo Fidelity: Footer

Sidebars
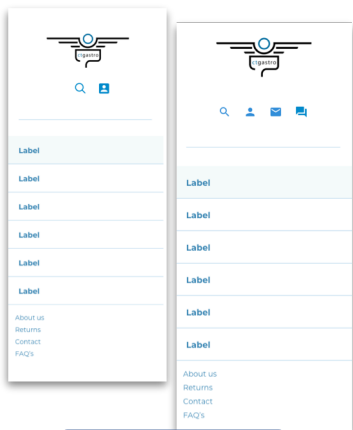
Snackbar
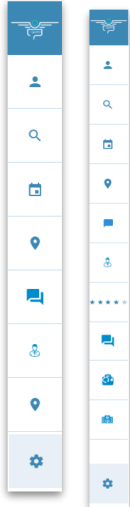
Nav. Bars   Components & Pages

DOCTORS   LOCATION

Competitor: Premier Medical Associates

Wireframes: Doctors Page

Competitor: Centura Health

Wireframes: Location
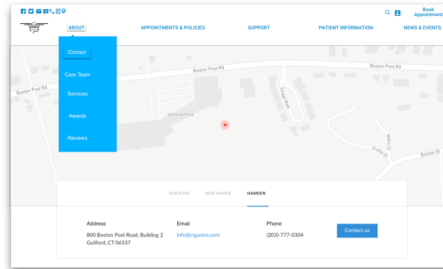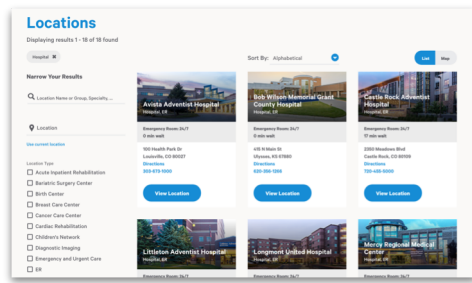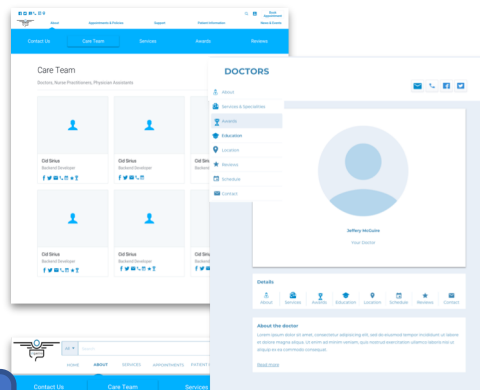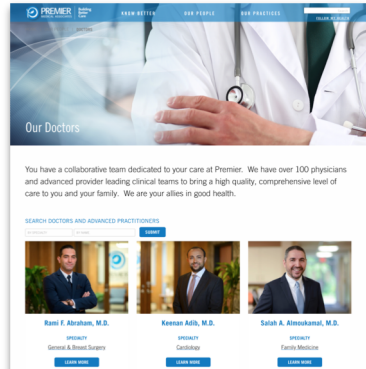
Competitor: Mayo Clinic

Competitor: One Medical Contact Us
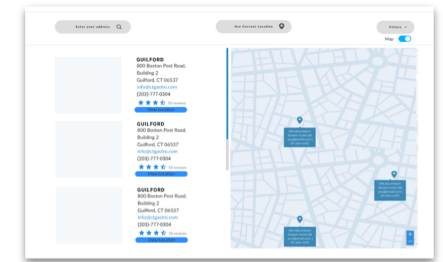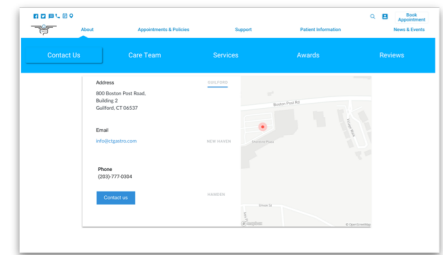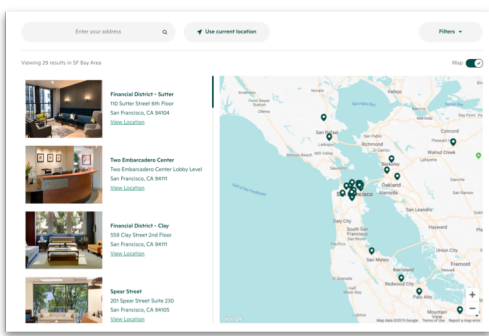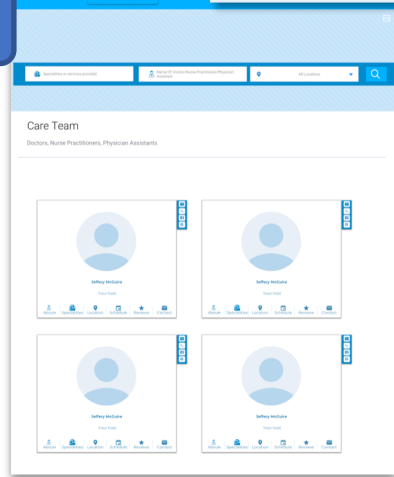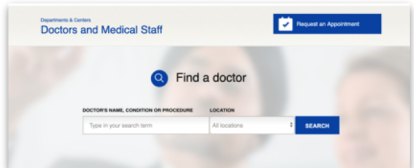
Key Takeaways

Final Prototype

HOMEPAGE

Current Site: Homepage
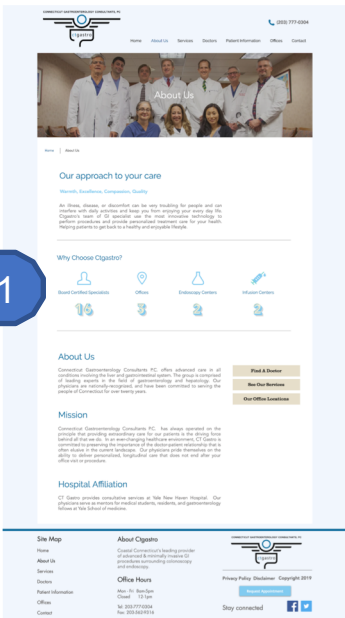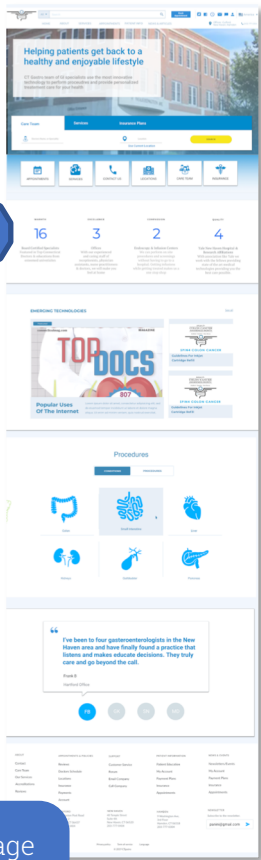
Hi Fi-Homepage

Hi-Fi Homepage-Header Options

Current Site: About Us

1
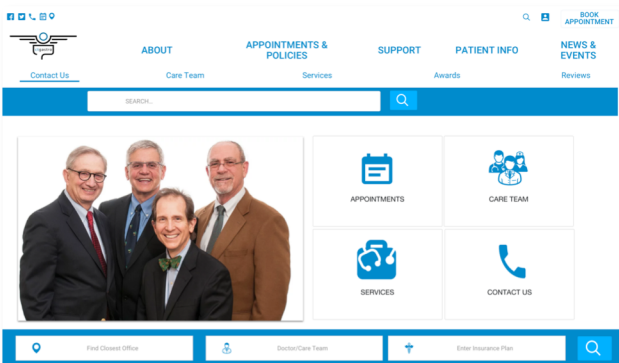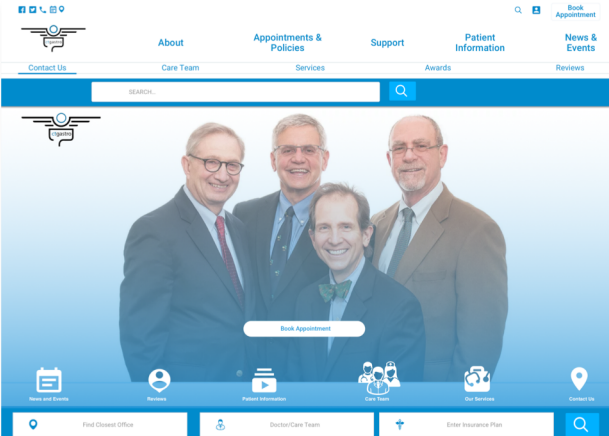
Added Accreditation in the Homepage which they did in About us page decided to put in both sections for users to help reinforce doctors status.

Key Takeaways

Final Prototype

DOCTORS/CARE TEAM

NEWS & EVENTS

Current Site: Doctors Page

Wireframe Doctor Page

Homepage (News & Events)

News & Events

1
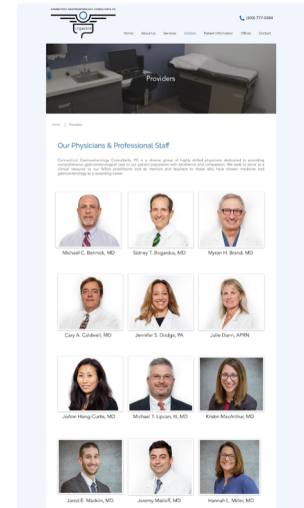
Current Site: Individual Doctor Page

1
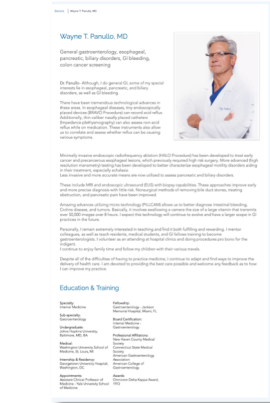
Here you can rotate tabs individually on each card instead of going to separate page

2

2
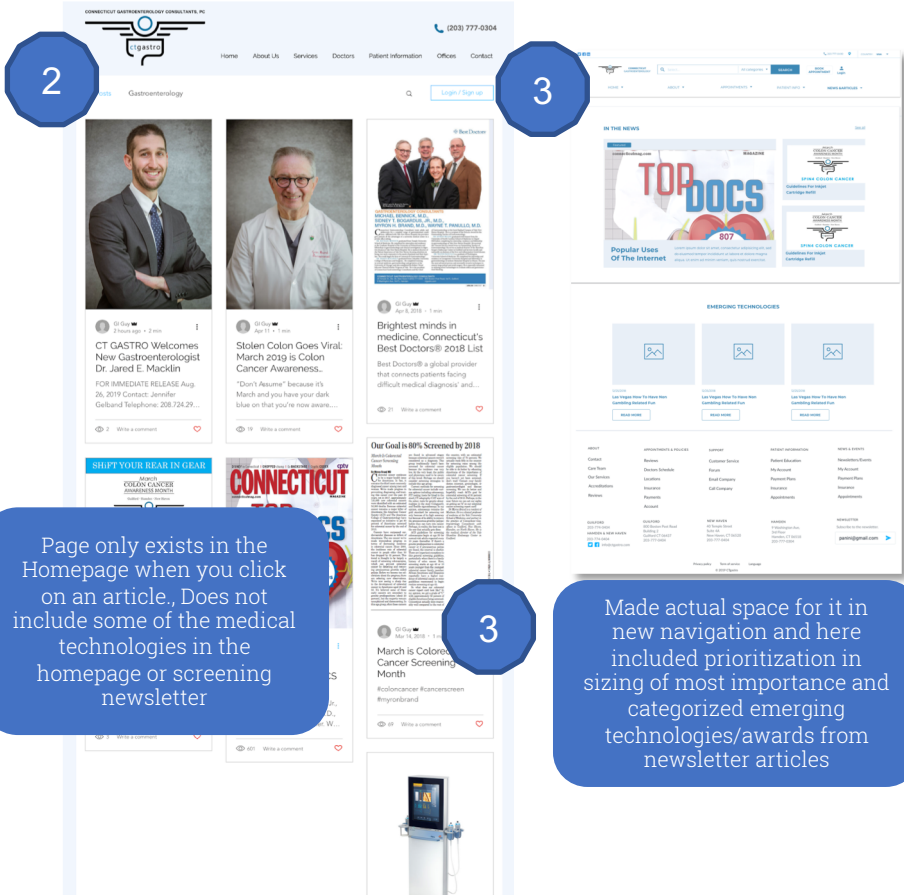
Page only exists in the Homepage when you click on an article., Does not include some of the medical technologies in the homepage or screening newsletter

3

3

Made actual space for it in new navigation and here included prioritization in sizing of most importance and categorized emerging technologies/awards from newsletter articles

Key Takeaways

Final Prototype

CONTACT US/LOCATION

REVIEWS

Current Site: Office Page
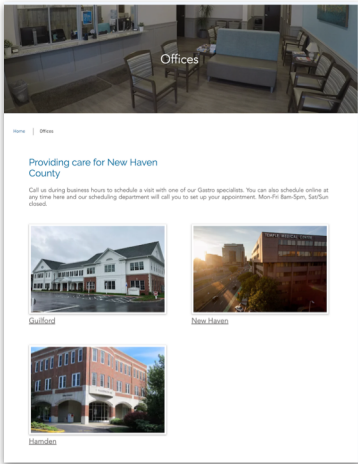
Wireframe: About Us-Contact Us

Current Site: About Us-Contact Us
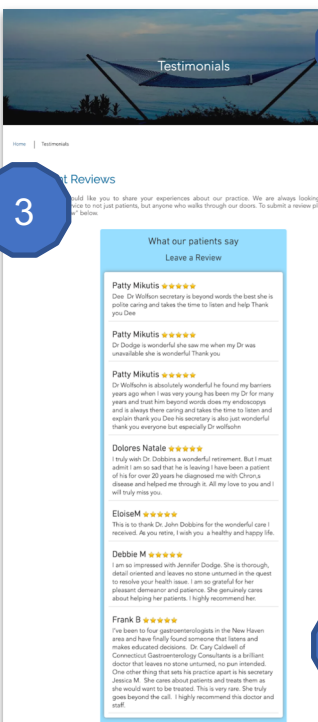
Wireframes: About Us: Reviews

2 Under the "About" is the Contact Us page which includes locations and ways to contact all in one page using the map view, condenses need for three different pages Contact Us, and Office Page with three separate pages for offices

1 Broken into three pages for offices each with individual location and location in Google maps not even always accurate. Office Page separate from contact us

4 Under about page included Reviews as an option in secondary nav. Also put reviews in homepage as well

3 Testimonial page only found on homepage if you click on the testimonials no visible area of navigation otherwise
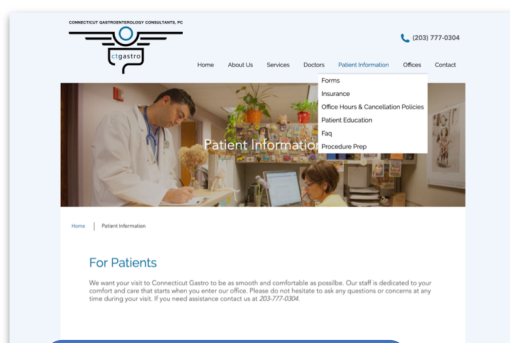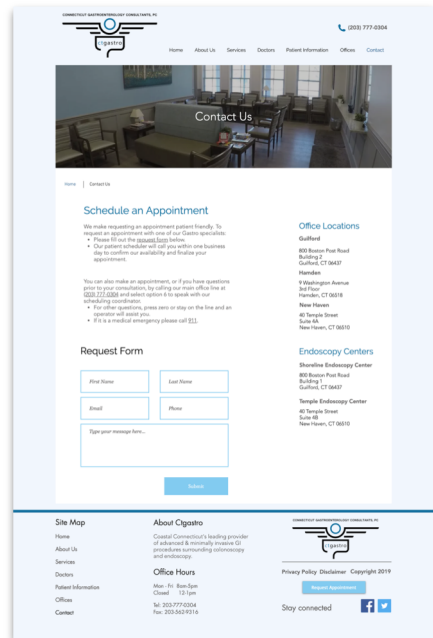
Key Takeaways   Final Prototype

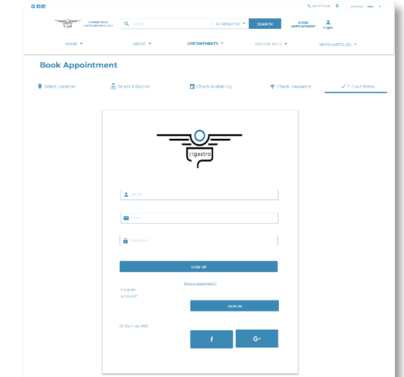## APPOINTMENTS (Insurance, Cancellation Policies)

Current Site: Contact Us

Current Site: Patient Info
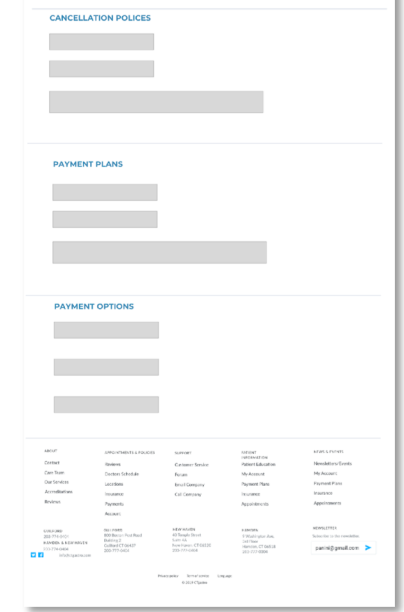

Current Site: Patient Info (Insurance)

Current Site: Patient Info (Office Hours & Cancellation Policies)

Wireframe: Appointments
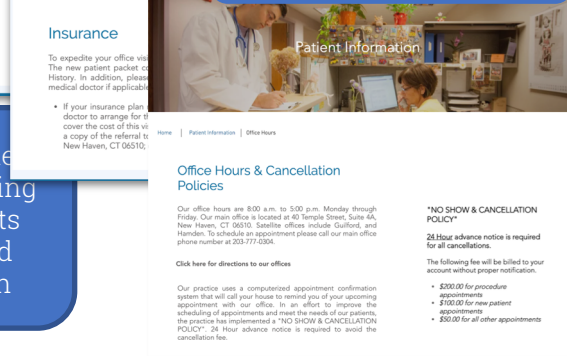
1 Enter insurance beforehand in the progress bar for appointment booking as well as signup information (puts information from patient info and from Contact Us into one location
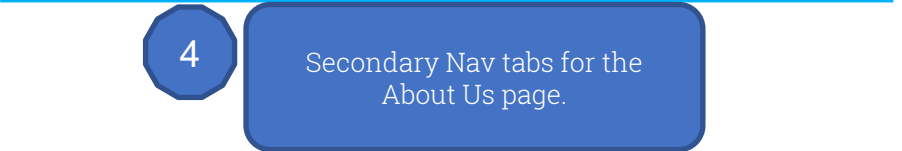
Key Takeaways

Final Prototype
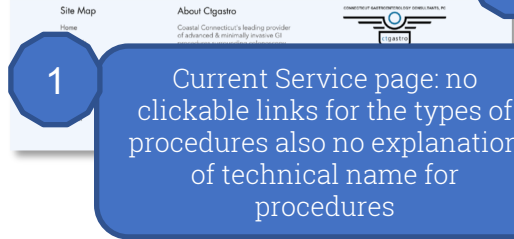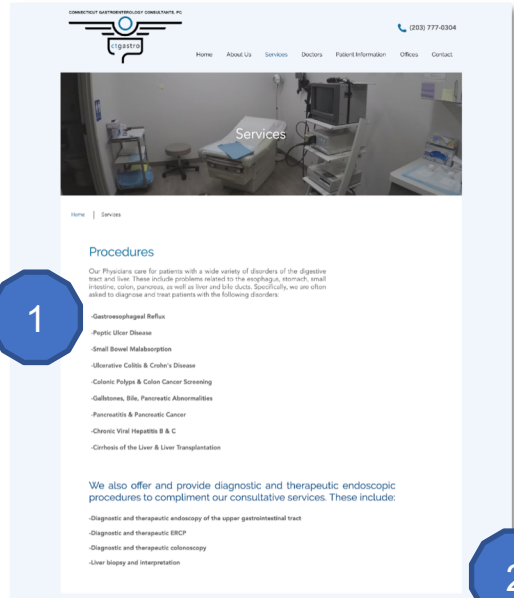
SERVICES

FINAL NAVIGATION

Current Site: Services

Hi-Fi: Services-

Navbar

1 Current Service page: no clickable links for the types of procedures also no explanation of technical name for procedures

2 Added rollover feature for condition and procedures

3 Included Search bar option to help increase findability.

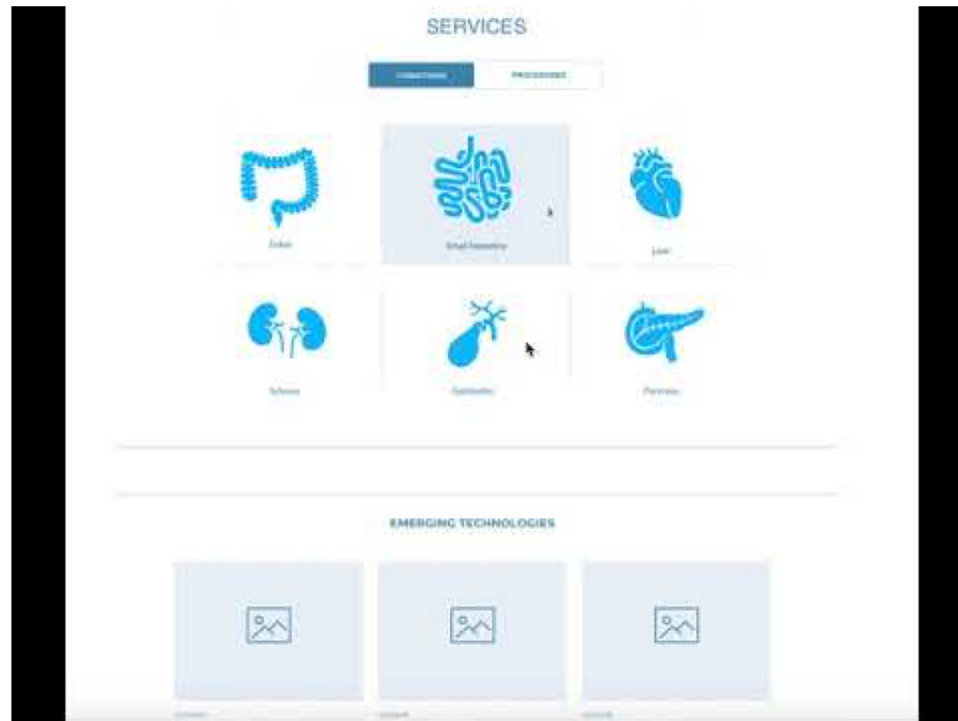**SECONDARY MENU: ABOUT US--REVIEWS**

4 Secondary Nav tabs for the About Us page.

INTRODUCTION | CARD SORTING | TREE TESTS | SITEMAP | COMPETITIVE ANALYSIS | WIREFRAMES & NAVIGATION | KEY TAKEAWAYS

Original vs. Edited Site | Key Takeaways | Final Prototype

Clickable Prototype

[Final Prototype](#) Video

THANK YOU!

Link to: [CT Gastro Case Study](#)