

Proxy Setup Round 1 Usability Test Summary Findings & Recommendations

When: May 25 & 27, 2010. Oakland, CA

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Study Goal

The goal of this study is to evaluate the usability of the Proxy setup pages. The primary questions this study addresses are:

Day 1

1. Where do they expect to look for the setup? *
 - Is the page findable? *
 2. Can they complete and understand each of the flows? *
 - Child (full access) at the same address *
 - Child (full access) at a different address *
 - Child (limited access) *
 - Adult for adult –give access *
 - Diminished capacity subject (requiring form) *
 3. Label testing of ‘diminished capacity’
 4. What do users understand about what they can see, control and perform for others? *
 5. “Cannot access all/any of child’s record due to state law” is understandable to users *
 6. What understanding do users have of what someone else can see, control, and perform for them? (i.e., answer some of the FAQs around why they won’t be able to access people’s record in certain circumstances). *
 7. Do users know how to find out what features they can see for their subject? *
 8. Do delegates understand if/why lists of features are different? *
 9. Do users understand different features availability based on ages? *
 10. Do users understand how to get back to the main page after proxy setup? Do they understand what information is available on the page and what they can do (e.g., design is going to be very important for this page b/c there is a lot going on and needs to be laid out in a consumable fashion). *
 11. What are users’ reactions to how the proxy setup steps are presented?
 - Step indicator (step indicator is for adult to adult delegate privilege)
 - Vertical presentation of steps
 12. Do users understand the HIPAA auth statement?
 13. Do users understand the notifications & messages associated with the processes?
 14. What are users understanding of privacy when it comes to their health information?
- Inferred information from testing
- Do users feel comfortable with the types of records their family member can view when they’re acting for them? How does that change if the subject is a child?
 - Do users understand/need to see the list of sensitive record types Legal wants adults to see when giving another family member access?

Day 2 (after 1 day break)

1. Where do they expect to look for the setup? *
 - Is the page findable? *
2. Can they complete and understand each of the flows? *
 - Adult for adult –give access *
 - Diminished capacity subject (requiring form) *
 - Adult for child (limited access) *
3. Label testing of ‘diminished capacity’
4. What do users understand about what they can see, control and perform for others? *
5. “Cannot access all/any of child’s record due to state law” is understandable to users *
6. What understanding do users have of what someone else can see, control, and perform for them? (i.e., answer some of the FAQs around why they won’t be able to access people’s record in certain circumstances). *
7. Do users know how to find out what features they can see for their subject? *
8. Do delegates understand if/why lists of services (features) are different? *
9. Do users understand different services (features) availability based on ages? *
10. Users are able to modify an existing proxy relationship. change expiration, service (feature) access *
11. What do users expect to see on the printout? Are they able to print any of the forms they’re likely to want or that legal requires they are able to print out? *
12. What do users expect to happen when they click on view features list in the success message?
13. What do users think of the services (features) list presented after clicking the jump link?
14. Do users understand the HIPAA auth statement?
15. Do users understand the notifications & messages associated with the processes?
16. What are users understanding of privacy when it comes to their health information?

Participants

Ten participants partook in the two-day study on May 25 & 27, 2010. The study was conducted by observing how participants perform core task scenarios. Additionally, participants were interviewed to garner subjective feedback related to the points listed above (relating to the testing objectives). Participants for this study consisted of 10 people 4 male and 6 female (females comprise approximately 60% of delegates program wide). We recruited from the 31-64 range and met with 6 who act for others for their medical care (proxy relationships). Each test session lasted about 45-minutes. The participants were recruited by Qualitative Insights of Sherman Oaks, California.

Conducting the Study

- Participants were asked to complete a scenario-based task.
- The test stimulus was an iRise (v.7.0) simulated prototype.
- Testing was conducted running on iRise Reader 7.
- Participants were asked to complete a combined User Experience and System Usability Survey (SUS – from Digital Equipment Corporation) at the end of the study session.

Study Results

Key Findings & Recommendations

The findings and recommendations in this section represent important usability issues that were uncovered during user testing. These issues garnered considerable user comments and/or errors, leading to issues of overall effectiveness, efficiency and/or user experience. It is strongly recommended that these issues be addressed prior to others to improve the usability and experience when engaging with this product.

- **Some users had difficulty finding and understanding all the links for actions on the summary page.** Once participants had added some family members they could then act for, the summary page changed and some elements were moved down. (See [fig 2 & 3](#)) During the first day of testing, the list of family members they could act for was at the bottom of the page, so when they were asked what they could see of their family member's medical records, they had difficulty finding the information. It was below the fold and they had to scroll to see the list. On the second day of testing, some text was removed from the summary page and the list of family members they could act for was moved up on the page. The result was that the action links to add additional family members were pushed lower on the page and some participants had difficulty finding them. **(Impact: Critical)**

Recommendation: Consider utilizing the left navigation for some of the most used links, such as add a new family member or act for a family member. Another option may be to place jump links at the top of the page that would link to actions the member could take to add new subjects. This would keep the list of family members they can act for above the fold as well. This issue has also brought into focus the possibility that the summary page is presenting many actions and it needs to provide guidance and instructions to users what is available to them and a clear path for each action. (See [fig 4](#)):

1. Adding additional family members
2. How to act for a family member who is already added
3. Editing family members- including entering authorization codes
4. Giving access to another member
5. Viewing and editing personal information

This may be done either through separating these actions onto new pages, a new graphic presentation of the information, clearer editorial, use of navigational elements (left navigation or jump links) or some combination of these solutions.

- **Users wanted an easy way to start acting for a family member after setting up access.** Once the participants had set up access for a family member, they were confused as to how they could start acting for that family member. Users wanted to be able to click on the list of services and begin acting for the family member immediately. There was some confusion as to what their next action might be if the list was not hyperlinks. **(Impact: Critical)**

Recommendation: Some strategy as to how to direct members how they can begin acting for family members from the proxy setup page should be identified. Some suggestions from the testing:

- Hyperlink the family member names. Clicking them would take the user to a page where the proxy switcher would be set at the subject's name and the delegate would be able to view and act for the subject
 - Hyperlink the services in the list under the subject, clicking would take the member to that area. The proxy switcher would change to the subject
 - Instructions in the success message as well as copy on the proxy summary page would direct the member to use the primary and secondary navigation to navigate to the page and instructions for using the proxy switcher would be included
 - Utilize the left navigation as a way for members to start acting for their subjects (names would be added once they had set up access)
- **Participants were confused by the limited access for older children.** The explanation for why an older child's services would not be viewable raised many questions for users. After the state privacy laws were either read by the participant (day 1) or the moderator explained the state law (day 2), participants still felt they wanted or needed additional information. **(Impact: Moderate)**

Recommendation: Leave the link next to the 'limited access' message next to the subject name (see [fig 5](#)), as presented on the second day of testing was much more findable (all participants easily identified it, as opposed to only 3 out of 5 on day 1 when it was above the subject section). Additionally, the [why?](#) link could contain text that outlines the state privacy law as well as additional resources that members might be interested in, such as how they might request full access for an older child, and/or links to the full text of the law for their state. The interactivity of the link itself is open to designers, as there was not a clear preference expressed by users.

- **The text for reviewing records before delegating another adult to view records should instruct members how to review their records more explicitly.** The text should explain to users where they can go (like primary navigation) to view their records. This is especially important if the list of services and features on that page will not be hyperlinks. The current text implies that the user can link directly to their records. (See [fig 6](#)). **(Impact: Moderate)**

Recommendation: In the section under 'View my Record' on the first page after users select 'Give access to my records to another adult' the text could be hyperlinked to allow the user to view each section. Alternatively, instructions about using the My Medical Record area to scan their medical records could be inserted, as well as instructions on returning to the proxy setup page afterwards (either through using the back button, or navigating through My Profile from the utility navigation). The editorial on this section could also be improved by removing the sections and focusing attention on links to [medical records](#) and [plan documents](#). (See [fig 1](#))

- **Users had a difficult time finding the proxy setup page.** 9 out of 10 participants were unable to find the proxy setup page from the home page. **(Impact: Moderate)**

Recommendation: The proxy setup page may be easier to find if additional labels are used, such as 'My Family' either in the utility navigation, under My Profile, or under My Health Manager. The use of notifications, alerts, or emails to members may help members to find the proxy setup page if they click on the link, however, it still may not be clear to members how to return to the page since they will not have navigated to the page on their own. If no changes to the main pages are possible, Kaiser may decide to institute an educational or promotional campaign to increase the visibility of the feature.

- **Users suggested they have the option to save the HIPPA agreement in addition to being able to print it.** People were interested in printing out the HIPPA agreement when delegating another adult to view their records, but there were some participants who suggested they would prefer to be able to save a file (PDF or DOC) to their hard drive or on the Kaiser server as a backup. **(Impact: Minor)**

Recommendation: In accordance with Kaiser’s goal of reducing the use of paper, it could be made clearer to members that a copy of the agreement would be available to them for future reference. Additionally, the digital copy could be made easier to download through a PDF & DOC link during the adult to adult delegation process.

Other Study Findings & Observations

The findings and observations below were uncovered during user testing. They should be considered and addressed to ensure a better user experience.

- Participants wanted the ability to select which services and features they would delegate someone to be able to view when delegating access to another adult. **(Impact: Minor)**
- There was some confusion on the part of 2 participants when delegating medical record access to another adult that the delegate might then have access to the records of their subjects as well (a transitive access might happen where the delegate would be able to see the subject, as well as all the people that subject has access to). **(Impact: Minor)**
- The term ‘diminished capacity’ was judged appropriate by all participants who were asked and appeared to be understandable.

System Usability Survey (SUS)

The System Usability Survey (SUS) was used to capture overall subjective assessment of usability of this product. A score of 70 and above is considered acceptable in terms of creating a satisfactory or better user experience according to industry standards. Kaiser Permanente Internet Services Group, as a leader in the digital health space, requires a score of 80 in order for a project to be considered acceptable.

The table below shows individual and group average results of SUS for this study. The scores between the first day and second day showed some improvement, however after analysis, the difference is not 'significant' (two tailed T Test & one tailed F Test) both returned results which showed a lack of statistical significance. [T Test = 0.771479, F Test = 0.361184]. This is most likely due to the small number (n) of participants.

The SUS scores for both days were both between 'excellent' (85.5+) and 'best imaginable' (90.9+).

DAY 1

Statement #	1	2	3	4	5	6	7	8	9	10	Total
Participant											
1	5	1	5	1	5	1	5	1	5	2	97.5
2	3	3	4	3	3	2	4	3	4	2	62.5
3	5	1	5	1	5	1	5	1	5	1	100.0
4	4	2	4	1	4	2	5	1	1	1	77.5
5	4	2	5	1	4	1	5	1	5	1	92.5
											Average 86.0
											std dev 15.77

DAY 2

Statement #	1	2	3	4	5	6	7	8	9	10	Total
Participant											
1	4	2	4	3	4	2	4	1	4	1	77.5
2	5	2	4	1	5	1	5	2	4	1	90.0
3	4	2	5	1	5	1	5	1	5	1	95.0
4	4	2	4	1	3	2	5	2	4	1	80.0
5	5	1	5	1	5	1	5	1	5	1	100.0
											Average 88.5
											std dev 9.62

A list of the SUS questions can be found in the Appendix.

Task Analysis

Key tasks (setting up an Adult for Child relationships) were completed more easily on the second day based on the time on task.

Day 1

	Task C (adult for child- full services)	Task F (adult for child- limited services)
Time on Task (Minutes)		
Mean	5.99	7.14
Standard Dev.	2.19	2.73

Day 2

	Task C (adult for child- full services)	Task F (adult for child- limited services)
Time on Task (Minutes)		
Mean	4.39	5.75
Standard Dev.	1.53	4.03

There were other improvements in perception by participants of ease of use, although the fact that participants were asked to do more difficult tasks on the second day reduced the task ratings (the scores participants gave based on their perceptions of 'ease of use'). I recommend retesting the usability of setting up adult to adult relationships, as well as the edit adult to adult relationship.

Appendix

View records

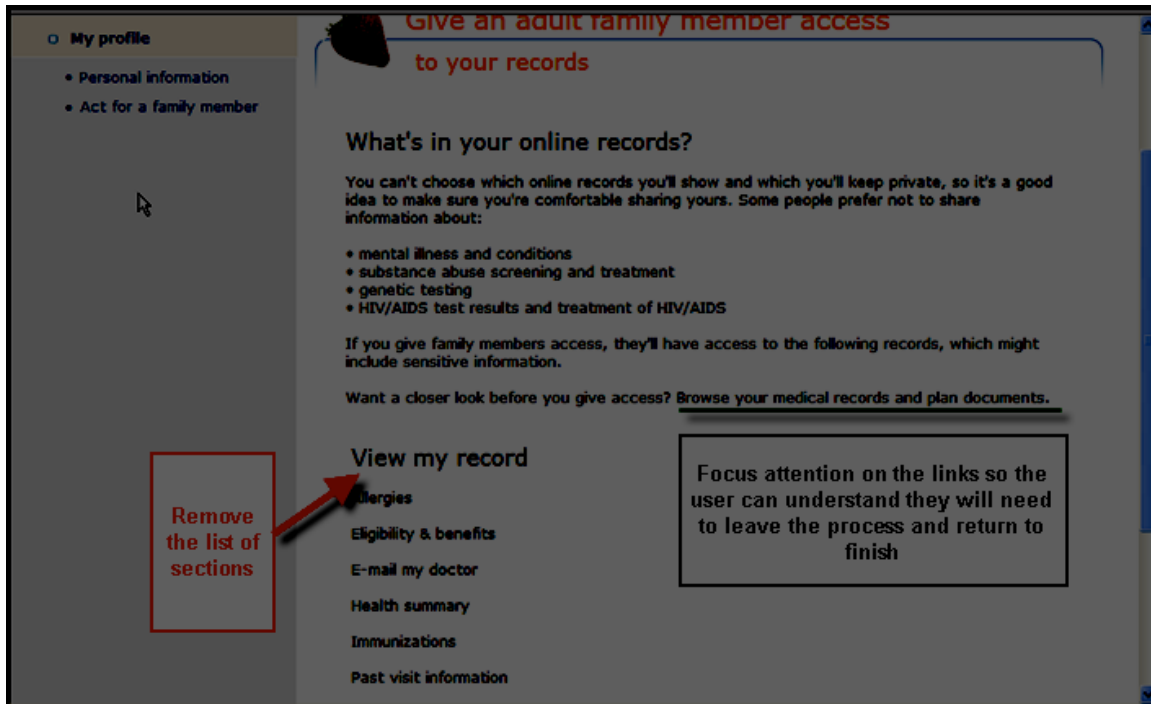


Figure 1 view records

Summary Pages

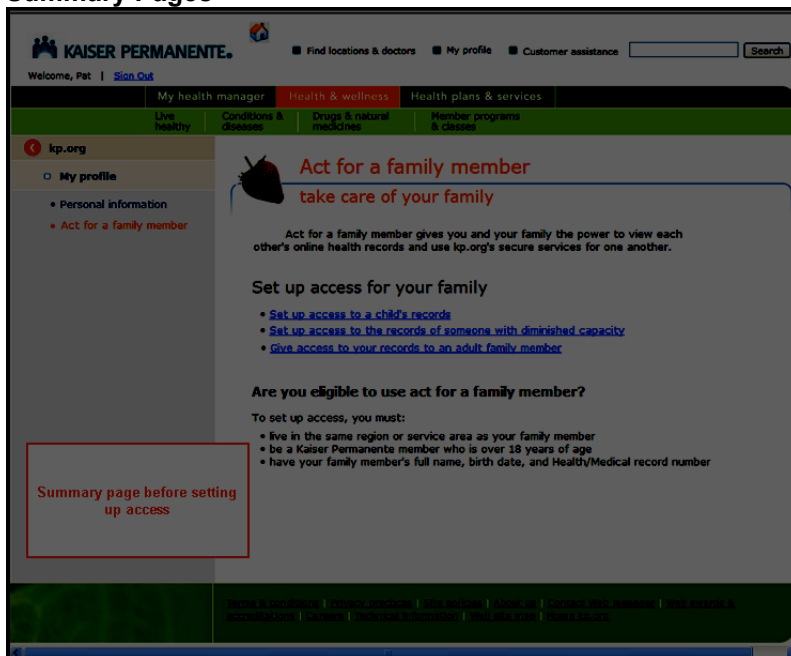


Figure 2 summary page A

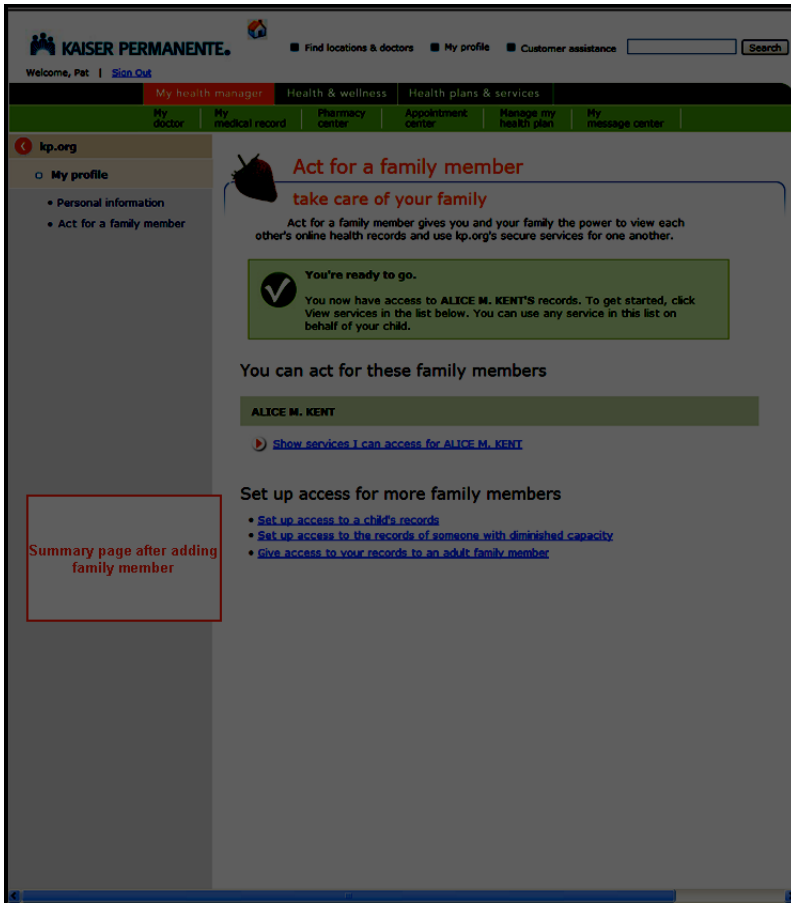


Figure 3 summary page B

Summary page actions

KAISER PERMANENTE. Find locations & doctors My profile Customer assistance Search

Welcome, Pat | Sign Out

My health manager Health & wellness **Health plans & services**

Our health plans Member discount programs Using our services Are you an employer?

kp.org

My profile

5 Personal information

Act for a family member

Act for a family member take care of your family

Act for a family member gives you and your family the power to view each other's online health records and use kp.org's secure services for one another.

Thank you

CHRIS P. KENT now has access to your records and will receive an e-mail confirmation with instructions on using kp.org on your behalf.

You can act for these family members

ALICE M. KENT

2 Show services I can access for ALICE M. KENT

DAVID A. KENT (Limited access Why?)

Show services I can access for DAVID A. KENT

These family members can act for you

CHRIS P. KENT

Access expires: May 31, 2012

3 Change expiration date | Revoke access | View/print agreement

Show services CHRIS P. KENT can access for me

Set up access for more family members

1 Set up access to a child's records

2 Set up access to the records of someone with diminished capacity

4 Give access to your records to an adult family member

Summary page has multiple actions that may be confusing for users

Figure 4 summary page actions

Limited access help link

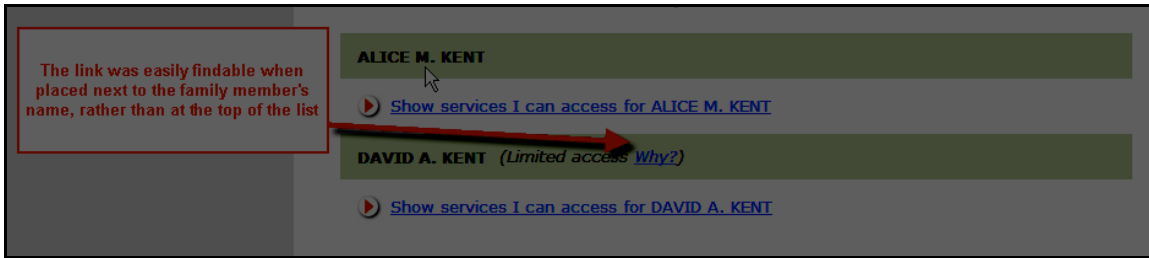


Figure 5 limited access link

Remove text

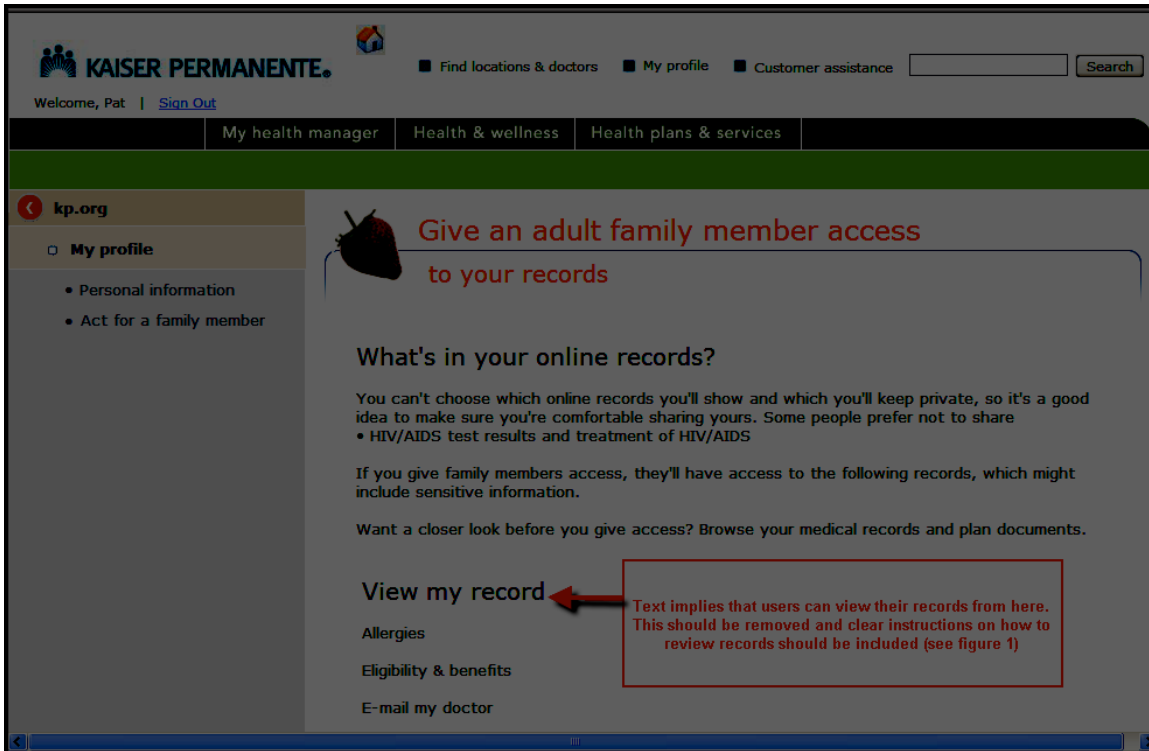


Figure 6 Unclear text

System Usability Survey (SUS)

Questions	Strongly Disagree				Strongly Agree
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1. I think that I would like to use this web site frequently.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I found the web site unnecessarily complex.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. I thought the web site was easy to use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I think that I would need the support of a technical person to be able to use this web site.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. I found the various functions in this web site were well integrated.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. I thought there was too much inconsistency in this web site.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. I would imagine that most people would learn to use this web site very quickly.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. I found the web site very cumbersome to use.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. I felt very confident using the web site.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. I need to learn a lot about this web site before I could effectively use it.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Proxy Setup Round 1 Day 1 Usability Testing Moderator's Guide

VERSION: 0.9

Date Prepared: 05/07/2010
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Study Overview

(DO NOT READ THIS SECTION OUT-LOUD TO THE PARTICIPANT)

Purpose

The overall objective for Proxy Setup usability testing is to confirm that all of the setup/extend access processes are usable.

Objectives that are considered higher priority have a * next to them

Round 1 Day 1

1. Where do they expect to look for the setup? *
 - Is the page findable? *
2. Can they complete and understand each of the flows? *
 - Child (full access) at the same address *
 - Child (full access) at a different address *
 - Child (limited access) *
 - Adult for adult –give access *
 - Diminished capacity subject (requiring form) *
3. Label testing of 'diminished capacity'
4. What do users understand about what they can see, control and perform for others? *
5. "Cannot access all/any of child's record due to state law" is understandable to users *
6. What understanding do users have of what someone else can see, control, and perform for them? (i.e., answer some of the FAQs around why they won't be able to access people's record in certain circumstances). *
7. Do users know how to find out what features they can see for their subject? *
8. Do delegates understand if/why lists of features are different? *
9. Do users understand different features availability based on ages? *
10. Do users understand how to get back to the main page after proxy setup? Do they understand what information is available on the page and what they can do (e.g., design is going to be very important for this page b/c there is a lot going on and needs to be laid out in a consumable fashion). *
11. What are users' reactions to how the proxy setup steps are presented?
 - Step indicator (step indicator is for adult to adult delegate privilege)
 - Vertical presentation of steps
12. Do users understand the HIPAA auth statement?
13. Do users understand the notifications & messages associated with the processes?
14. What are users understanding of privacy when it comes to their health information?

Inferred information from testing

- Do users feel comfortable with the types of records their family member can view when they're acting for them? How does that change if the subject is a child?

- Do users understand/need to see the list of sensitive record types Legal wants adults to see when giving another family member access?

Probable comps needed:

- *Simulations for each scenario:*
 - Finding the proxy setup page from:
 - login
 - homepage
 - or email notification (not sure what makes the most sense)
 - Child (under 11) at the same address*
 - Child (under 11) at a different address*
 - Diminished capacity subject (requiring form) NOT PRIORITIZED
 - Adult for older child (no access) NOT PRIORITIZED- but needed for testing access differences understanding
 - Adult for adult –give access*
 - linking to view medical information AFTER having set up a proxy relationship

Conducting the Study

45 min session/participant
5 participants
Oakland, CA
May 25, 2010

The study will be conducted by observing how participants perform core task scenarios. Additionally, participants will be interviewed to garner subjective feedback related to the points listed above (relating to the testing objectives). Participants for this study will consist of 5 people 2 male and 3 female (females comprise approximately 60% of delegates program wide). We will recruit from the 31-64 range and will specifically request at least 4 who act for others for their medical care (proxy relationships).

The participants will be viewing an iRise simulation using iRise reader 7.3.

They will view the iDocs through Firefox 3 in full screen on a 1028X764 resolution. Morae 3.1.1 will be used to record and log tasks.

Gathering Participant Data

Take note of the following instructions before beginning the actual testing procedures. Repeat the steps below for each of the participants.

- Date:
- Time;
- Participant #:
 - **1 = C E F**
 - **2 = E F G**
 - **3 = F G H**
 - **4 = G H C**
 - **5 = H C E**

- Additional priority tasks: H, C, F

Welcome and Introduction

READ OUT LOUD TO THE PARTICIPANT, BUT REMEMBER TO MAKE EYE CONTACT AND MAKE THEM FEEL AT EASE DURING THE TESTING SESSION. DON'T FORGET TO HAVE EACH PARTICIPANT SIGN THE CONSENT FORM.

[Turn on camera and begin recording]

I'll be guiding you through today's session...before we begin, would you mind signing the following consent form? The test is voluntary but you must sign form to take the test.

[Collect signed consent form]

During the rest of the session, I'll be working from a script to ensure that my instructions to everyone who participates in the study are the same.

A couple of things to keep in mind as we go through this...I'm interested in your honest opinions and impressions about the product:

- Keep in mind, we are not evaluating you in any way, so don't worry about making mistakes. There's no right or wrong answers.
- My job is to help the group in charge evaluate some of their thinking. So if you say something negative about anything you see today, it won't hurt my feelings. My job is to let the group know how to make the product easy for YOU to use.
- Throughout the session, I encourage you to say what comes to your mind, whether it's good or bad.

Do you have any questions before we begin?

To start, I'd like to ask you a few questions about yourself ...

Participant Interview

These generic questions should be asked of all participants.

Gender:	<input type="checkbox"/> Female <input type="checkbox"/> Male (do not ask, just notate)
Age Range:	<input type="checkbox"/> 18-29 <input type="checkbox"/> 30-39 <input type="checkbox"/> 40-49 <input type="checkbox"/> 50-59 <input type="checkbox"/> 60+
Profession:	
Hours on computer daily:	<input type="checkbox"/> 0 <input type="checkbox"/> 1-2 <input type="checkbox"/> 3-5 <input type="checkbox"/> 6-9 <input type="checkbox"/> 10+
Hours on Internet daily? (no email or chat)	<input type="checkbox"/> 0 <input type="checkbox"/> 1-2 <input type="checkbox"/> 3-5 <input type="checkbox"/> 6-9 <input type="checkbox"/> 10+



For generic members/non-members <i>What health insurance do you have? What has been your general experience with the insurance and their online services?</i>	
<i>In the past, what questions or issues did you go to the website for? Were you successful?</i>	

Tasks/Scenarios

List tasks, scenarios, and instructions that the users complete during the test here. Read the instructions out loud to the participant.

Reminder:

You may be viewing company and health plan member's information while using this web application. Rest assured, the company and member info you might see are not real. Although it is created to look like real data, don't be concerned that you're viewing or changing an actual company's or member's information.

TASKS

Task A: diminished capacity label testing test objectives: 1, 2, 3, 5, 7, 8, 9, 12, 13, 14, 15,

No simulation. Initiate discussion

For the purpose of testing today, you are Pat, the caretaker for a family. You have a father, Robert, who can't be held responsible for his behavior due to mental illness, disease, or extremely low intelligence. He isn't able to:



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- understand the consequences of their actions
- stop themselves from doing wrong

What would you call that? What would you call his condition? (**LABEL TEST diminished capacity**). 3

Have you had experience caring for anyone who would fit that description?

Task B: Log In/Proxy Setup location test objectives: 2, 6, 8, 11, 12,

Give scenario, family makeup, etc

You are Pat Kent, the caretaker for a family with a spouse, Chris, 2 children (David, a teen, & Alice, an 8 year old) as well as Robert Anderson, an elderly _____ parent all living with you. Your son, John, 10, who lives with your ex-spouse most of the time, although you attend to John’s health care needs as well.

Open simulation to home page

What do you usually do when coming to the Kaiser web site? Where would you click normally?

If you wanted to arrange to view and manage your family’s health care through the Kaiser website, show me how you would do that for the first time.

Expectation that participant will navigate to act for a family member

Where would you expect to find their information?

You do not need to do it yet, but tell me how would you set it up for the first time?

Rating

Tester Rating

Task Completion?

0=Failed/Incomplete 1=Completed w/ trial and error 2=Succeeded, no errors

User Rating

On a scale of 1-5, how would you rate the website (this page) overall in helping you find the answer to this question? (1=poor, 5=excellent)(This feature is also available in Morae (a pop-up asks the participant how they would rate the difficulty of each task)

What made it a ___?

Navigation completed?

0=Failed/Incomplete 1=Completed w/ trial and error 2=Succeeded, no errors



Task C: Adult for Child (all features) test objectives: 1, 2, 10, 12,

You wish to view records and test results for your 8 year old daughter, Alice. Here is the information you know about her.

Provide Alice information

Show me how you would setup to act for Alice

Upon process completion

How does that feel for you?

What did you think of that process?

How would you improve it?

Rating

Tester Rating

Task Completion?

0=Failed/Incomplete 1=Completed w/ trial and error 2=Succeeded, no errors

User Rating

On a scale of 1-5, how would you rate the website (this page) overall in helping you find the answer to this question? (1=poor, 5=excellent)(this feature is also available in Morae (a pop-up asks the participant how they would rate the difficulty of each task)

What made it a __?

Navigation completed?

0=Failed/Incomplete 1=Completed w/ trial and error 2=Succeeded, no errors

Task D: View feature after setting up proxy test objectives: 2, 4, 6, 8, 9, 10, 11, 14, 16, 17, 18

How would you look at the services you can see and control for Alice? What can you do for Alice? 4, 7, 11, 13

What would you want to do next?



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How would you use this list?

Rating

Tester Rating

Task Completion?

0=Failed/Incomplete 1=Completed w/ trial and error 2=Succeeded, no errors

User Rating

On a scale of 1-5, how would you rate the website (this page) overall in helping you find the answer to this question? (1=poor, 5=excellent)(this feature is also available in Morae (a pop-up asks the participant how they would rate the difficulty of each task)

What made it a __?

Navigation completed?

0=Failed/Incomplete 1=Completed w/ trial and error 2=Succeeded, no errors

Participant #____ Task completed? 0 1 2

Task E: Adult for child (all features) different address test objectives: 1, 2, 3, 5, 12, 14,

Set up access to medical records for your 11 year old son, John, who lives with your ex-spouse **2, 11**

Please talk me through the process

What happened? (**response to pending setup**) **2**

What do you expect to happen next?

You want to continue with the process.

What is '**request expires**' for?

What is the '**cancel access request**' for?

Reset to E2- You have received a letter from your ex-spouse with an authorization code on it. It is several days later and you need to sign back into the website.

Hand participant authorization code

Talk me through how you would do to complete the process to act for John on the Kaiser website.

What did you think about that process?



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Anything you would change about it?

What kinds of things can you do for John on the Kaiser website now that you have set up proxy? 4, 7

Rating

Tester Rating

Task Completion?

0=Failed/Incomplete 1=Completed w/ trial and error 2=Succeeded, no errors

User Rating

On a scale of 1-5, how would you rate the website (this page) overall in helping you find the answer to this question? (1=poor, 5=excellent)(this feature is also available in Morae (a pop-up asks the participant how they would rate the difficulty of each task)

What made it a ___?

Navigation completed?

0=Failed/Incomplete 1=Completed w/ trial and error 2=Succeeded, no errors

Participant # _____ Task completed? 0 1 2

Task F: Adult for child (limited features) test objectives: 1, 2, 3, 5, 8, 9, 10, 12, 14

You have an older child who lives with you, David. Show me how you would set up access for David 2, 11

What can you see or do for David on the Kaiser website? 4, 5, 7, 8, 9,

Wait for participant to notice if here are differences in available features

Why can you see different features for Alice & David?

What do you think about that?

Is it understandable?

Rating

Tester Rating

Task Completion?

0=Failed/Incomplete 1=Completed w/ trial and error 2=Succeeded, no errors



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User Rating

On a scale of 1-5, how would you rate the website (this page) overall in helping you find the answer to this question? (1=poor, 5=excellent)(this feature is also available in Morae (a pop-up asks the participant how they would rate the difficulty of each task)

What made it a ___?

Navigation completed?

0=Failed/Incomplete 1=Completed w/ trial and error 2=Succeeded, no errors

Participant #____ Task completed? 0 1 2

Task G: Adult for diminished capacity adult or child

What would be your expectations about how you set up access for Robert?

Show me how you would set up so have access for your father's medical records 2,

What do you think the **request KP.org access** link is?

What would happen next?

What do you think about that process?

Rating

Tester Rating

Task Completion?

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User Rating

On a scale of 1-5, how would you rate the website (this page) overall in helping you find the answer to this question? (1=poor, 5=excellent)(this feature is also available in Morae (a pop-up asks the participant how they would rate the difficulty of each task)

What made it a ___?

Navigation completed?

0=Failed/Incomplete 1=Completed w/ trial and error 2=Succeeded, no errors

Participant #____ Task completed? 0 1 2



Task H: Adult for adult delegation test objectives: 1, 2, 4, 5, 12, 13, 14, 15

Show me how you would set it up so your spouse, Chris, would be able to access your medical information. 11

What can Chris see, control and perform for you? 6, 12, 13, 14

Gather expectations/reactions

~~Possibly take the participant to feature and back to process (test results?)~~

Please continue to set up for Chris to have access for your medical records.

What are navigation behaviors of participant?

Give participant information

Prompt for response throughout, expiration setting.

What do you think of the process?

HIPPA understanding- What are you supposed to do? What does it say?

Signed HIPPA

What do you think about this page? What would you use it for? How would you print the HIPPA agreement?

Success message

What would you do next?

How would you improve it?

What is the 'change expiration date' link for? and 'revoke access'?

What can Chris see, control and perform for you? 6, 12, 13, 14

Gather expectations/reactions

Rating

Tester Rating

Task Completion?

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User Rating

On a scale of 1-5, how would you rate the website (this page) overall in helping you find the answer to this question? (1=poor, 5=excellent)(this feature is also available in Morae (a pop-up asks the participant how they would rate the difficulty of each task)



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What made it a ___?

Navigation completed?

0=Failed/Incomplete 1=Completed w/ trial and error 2=Succeeded, no errors

Participant #_____

Task completed?

0 1 2

Task Q:

Follow up Questions

Any information you think is missing on these pages?

How's the language on this page for you? Did you notice it, read it?

If you could make just 3 changes to anything you saw today, what would the changes be?

Do you have any other comments/feedback about anything you saw today that we didn't talk about already?

Administer SUS

Thank you for you help and feedback!

[Administer the incentive]