

Member setup

Let's get started, Elena.

Help us direct you to the best appointment by choosing an option below.

Set up a primary care appointment

To begin, enter a symptom, condition, or a type of appointment, such as eye exam or physical exam.

Next

Follow up with a specialist

Schedule an appointment for an ongoing or existing condition. New conditions require an evaluation first with your primary care physician in order to obtain a referral for specialized care.

Cancel **Back**

When would you like your appointments?

Update now
Last updated: 9:49 am

APPOINTMENT FOR

Elena Martinez Pearl Martinez William Martinez

DATE: 02/01/2018

TIME OF DAY: Morning Afternoon Evening

LANGUAGE: Any GENDER: Any

Remove appointment

Cindy Woods, MD
FAMILY MEDICINE
View information

Baldwin Park Medical Center
View other locations

NEXT AVAILABILITY
Wed, Feb 2

	Tue Feb 1	Wed Feb 2	Thur Feb 3	Fri Feb 4	Sat Feb 5	Sun Feb 6	Mon Feb 7
		9:00 am	8:00 am	9:30 am	9:00 am	9:00 am	9:00 am
		10:00 am	11:00 am	10:30 am	3:00 pm	1:00 pm	10:00 am
		10:30 am	11:30 am	11:00 am		2:00 pm	1:00 pm
		11:00 am	12:00 pm	11:30 am		2:30 pm	1:30 pm
		11:30 am	12:30 pm	12:00 pm		3:00 pm	2:00 pm
		12:00 pm	1:00 pm	12:30 pm			3:00 pm

ACAA KPATH 2.0 Multiple Appointments (Round 4) Study : Findings

April 25, 2018

User Research Overview

Purpose

Evaluate a revised design model for scheduling multiple appointments focusing on ...

- Progress tracking across the multiple appointments booking workflow
- Effectively triaging users given different reason for appointment scenarios
- Providing examples and language in attempts to train users how to use the “symptom search” field
- Selecting a location instead of selecting a specific provider
- New layout and interactive approach to scheduling dates and times

Participants

8 users including 7 members registered on Kp.org and 1 non-member who schedule appointments for themselves and children or other family members

What & When

Usability sessions held remotely, primarily with SCAL and NCAL participants, to evaluate a desktop prototype of a multiple appointments booking experience between April 17th and April 18th

User Research Overview: Key Research Questions

1. Reason Step:

- Can users readily self-triage given different reasons for appointment?
- Does the revised header and copy above symptom search field help guide users how to use it?

2. Visit Type:

- How do users perceive phone and video visits types? Who do users expect to speak to or see?

3. Location Selection:

- What are user expectations when selecting a location? Do they miss selecting a specific provider?
- What information do users want to see when selecting a location?

4. Progress Tracking:

- Does the progress tracker help users understand the steps in the workflow?

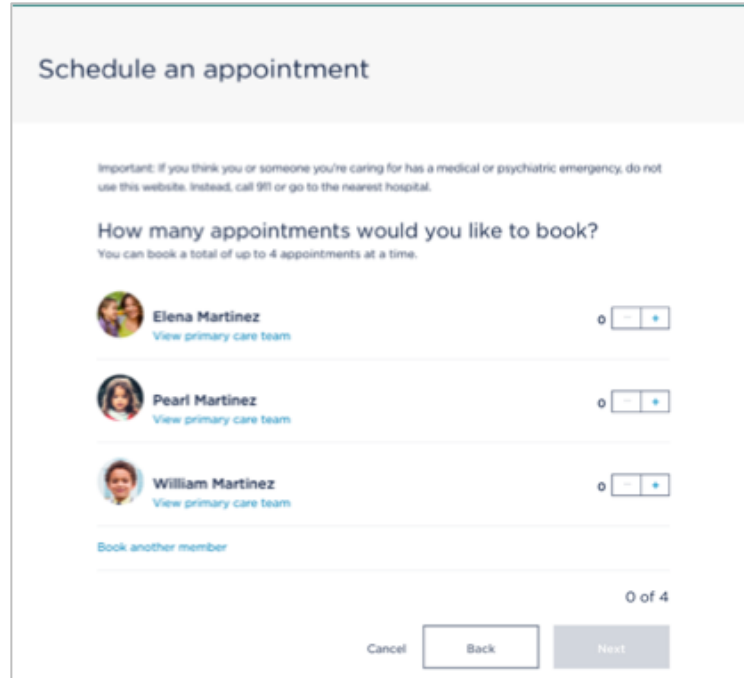
5. Date and Times:

- How do users intend on viewing times specific to or across different physicians and members?
- Do users understand how to view other providers' schedules?
- Do users understand how to view other appointments for themselves or other members?
- How useful is it to access other locations within the scheduling step (i.e. specific or non-specific to a provider)?

Member Appointment Set-up: Appointment Selection

Ticker appointment set-up model was easy to use and intuitive

- All users were able to quickly use without any issue
- “Add another member” link was understandable as an option to schedule other members not already linked to their account or for whom they were not already serving as a proxy



The screenshot displays a web interface for scheduling an appointment. At the top, the heading "Schedule an appointment" is followed by a disclaimer: "Important: If you think you or someone you're caring for has a medical or psychiatric emergency, do not use this website. Instead, call 911 or go to the nearest hospital." Below this, the question "How many appointments would you like to book?" is posed, with a sub-note: "You can book a total of up to 4 appointments at a time." Three provider cards are listed, each with a profile picture, name, and "View primary care team" link. To the right of each card is a selection control consisting of a radio button and a small box with minus and plus signs. At the bottom left, there is a "Book another member" link. At the bottom right, it shows "0 of 4" appointments selected. At the very bottom, there are three buttons: "Cancel", "Back", and "Next".

Member Appointment Set-up: Reason Step

Initial self-triage at start of appointment set-up was intuitive

- Most users understood difference between primary care and follow-up with specialist
- “Set up primary care appointment” spoke to different symptom, visit type and physician specific scenarios upfront

Function and flexibility of symptom search field was unclear

- Optional? → A couple users ignored it all together, instead progressing by choosing “Next”
- Free-form text entry? → Others expected they could write more elaborate descriptions of symptoms, conditions, etc.

The screenshot shows a multi-step appointment setup process. At the top, a progress bar indicates the current step: 'Member setup' (active), followed by 'Elena Martinez', 'Pearl Martinez', 'William Martinez', 'Date & Time', and 'Book'. Below the progress bar, the text reads: 'Let's get started, Elena. Help us direct you to the best appointment by choosing an option below.' There are two radio button options: 'Set up a primary care appointment' (selected) and 'Follow up with a specialist'. The primary care option includes a text input field and a 'Next' button. The specialist option includes a 'Cancel' button and a 'Back' button.

Observations:

- ✓ Sub-text was not always read
- ✓ Size of field invited more expressive writing

Suggestions:

- ✓ Ghost text to guide users
- ✓ Reduce size of field to max character count

Member Appointment Set-up: Reason Step

Users had concerns and questions about scope and limitations of symptom search

- Complete context? → Some users expected to provide more information about their symptoms or reason for visit with the intent to better inform the pre-appointment triaging as well as communicate concerns to their physician
- Exhaustive? → Some users were concerned with not being able to describe or select symptoms or reason for visit; two users sought an “Other” option to further describe their symptoms or reason for visit

“Sometimes it is not as simple as a single symptom.” Krysti, 27

“If the precise symptom wasn’t available I would expect a place to explain it.” Lisa, 57

Let's get started, Elena.
Help us direct you to the best appointment by choosing an option below.

Set up a primary care appointment
To begin, enter a symptom, condition, or a type of appointment, such as eye exam or physical exam.

COMMON SYMPTOMS & CONDITIONS

COMMON SYMPTOMS & CONDITIONS	COMMON APPOINTMENT TYPES
Cough/Cold	Physical exam
Fever	Eye exam
Sinus congestion	Contact lens exam
Headache	
Back pain	

One user thought the common searches box represented all his choices

Let's get started, Elena.
Help us direct you to the best appointment by choosing an option below.

Set up a primary care appointment
To begin, enter a symptom, condition, or a type of appointment, such as eye exam or physical exam.

Urinary|

RESULTS

- Urinary Tract Infection
- Urinary Fistula
- Urinary Incontinence
- Urinary Reflux
- Urinary Retention

Member Appointment Set-up: Triage and Visit Type

Care providers associated with other visit types thought to provide both advise and treatment

- “Doctor or other care provider” text was thought to refer to either another doctor, a nurse practitioner or regular nurse depending on Kaiser’s assessment of the severity of the member’s symptoms or reason for appointment
- Phone visits were often associated with the Advise Nurse which could then lead to further care if needed as opposed to an “appointment”

“It could be a doctor, nurse or a midwife if I was pregnant, but usually when I have called I talk to an RN.” Ruth, 37

Member setup

Elena Martinez Pearl Martinez William Martinez Date & Time Book

Select the type of appointment you prefer

Note: Your primary care physician may not offer all visit types.

Office visit
See a doctor at one of our facilities.

Phone visit
Speak with a doctor or other care provider about minor conditions.

Video visit
Get care with a doctor or other care provider for minor conditions over a smartphone, tablet or computer.

Self care instructions

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco Duis aute exericitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure... [Show more](#)

Cancel **Back** **Next**

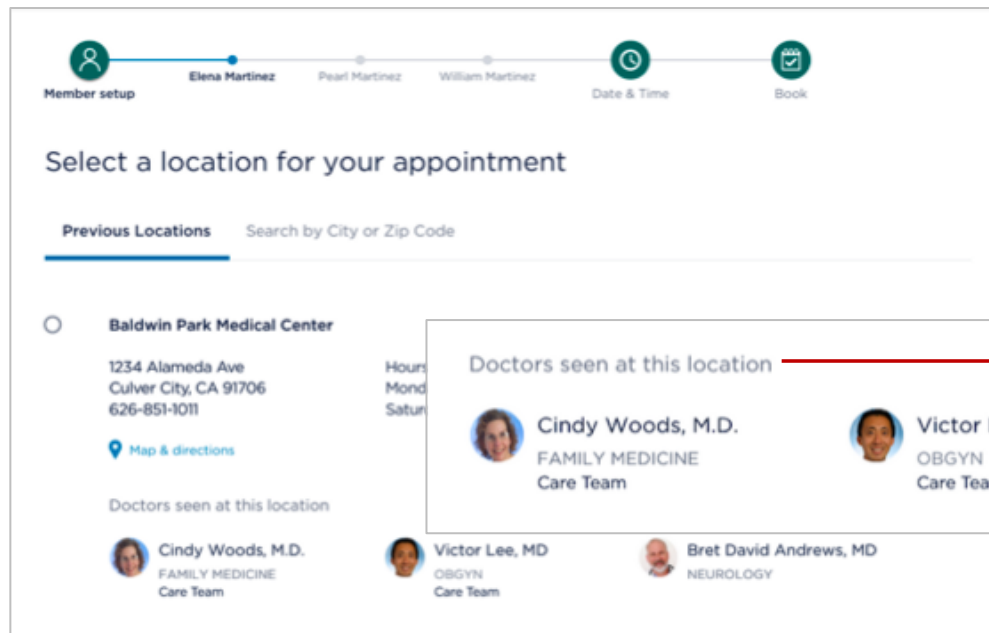
Additional Insights:

- ✓ It was not clear if other visit types were restricted to appointment that involved treatment
- ✓ Going through a triage process led some users to think Kaiser may not recommend an appointment

Member Appointment Set-up: Select Location

Presenting doctors at location invited both interaction and questions about its purpose

- Half of users expected to click doctors to see their schedules as a next step
- Users valued seeing doctors they have seen before when selecting a location
- Yet, some users were not clear why specific doctors were displayed and the purpose of displaying them given ...
 - ✓ An inability to interact in any way with the doctors displayed
 - ✓ “Doctors seen at this location” label was somewhat vague



*“Showing them would help, as I was given an OBGYN once before but they had left Kaiser.”
Katey, 40*

- ?
- ... doctors I have seen before?
 - ... doctors available to be seen?
 - ... doctors recommended I see given symptoms or reason for appointment?

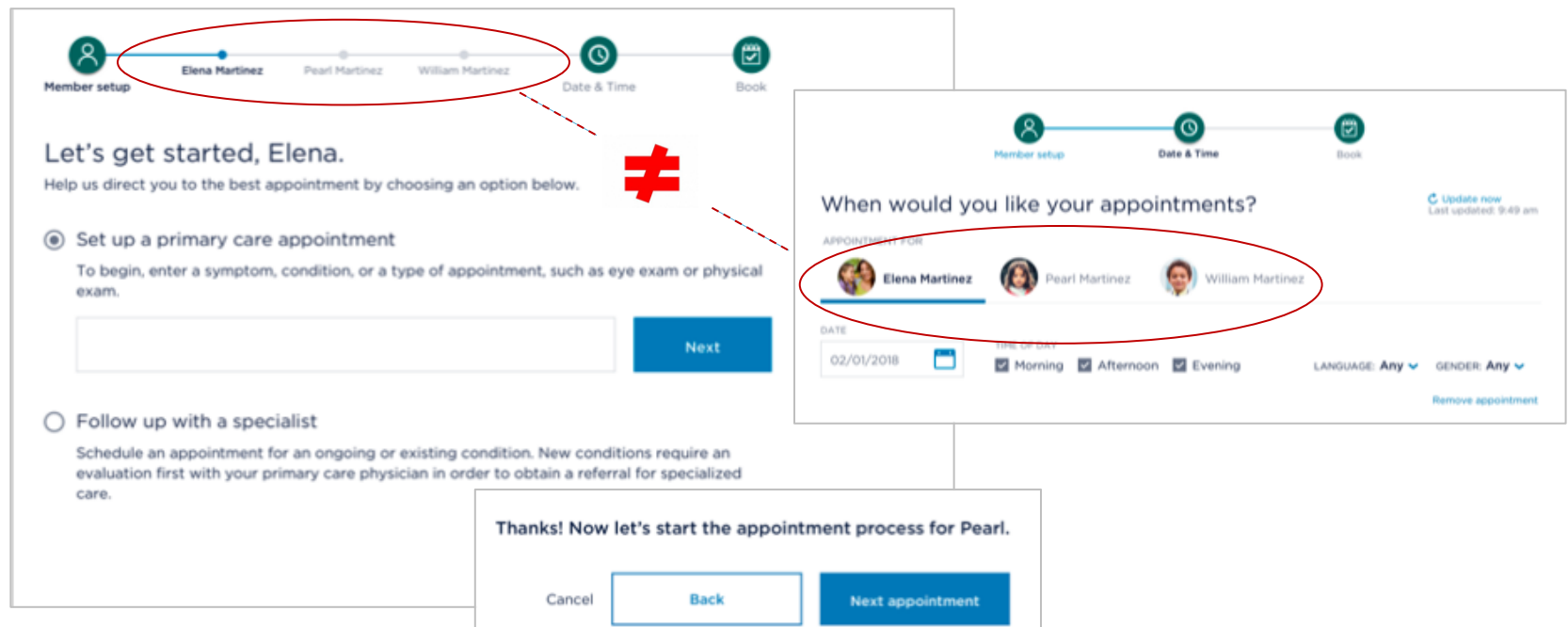
Member Appointment Set-up: Progress Tracker

Progress tracker intuitively communicated appointment scheduling occurs after set-up

- The linear format of the progress tracker was readily understood once users saw it

Date & Time step was expected to contain similar sub-steps as Member Setup in a linear progression

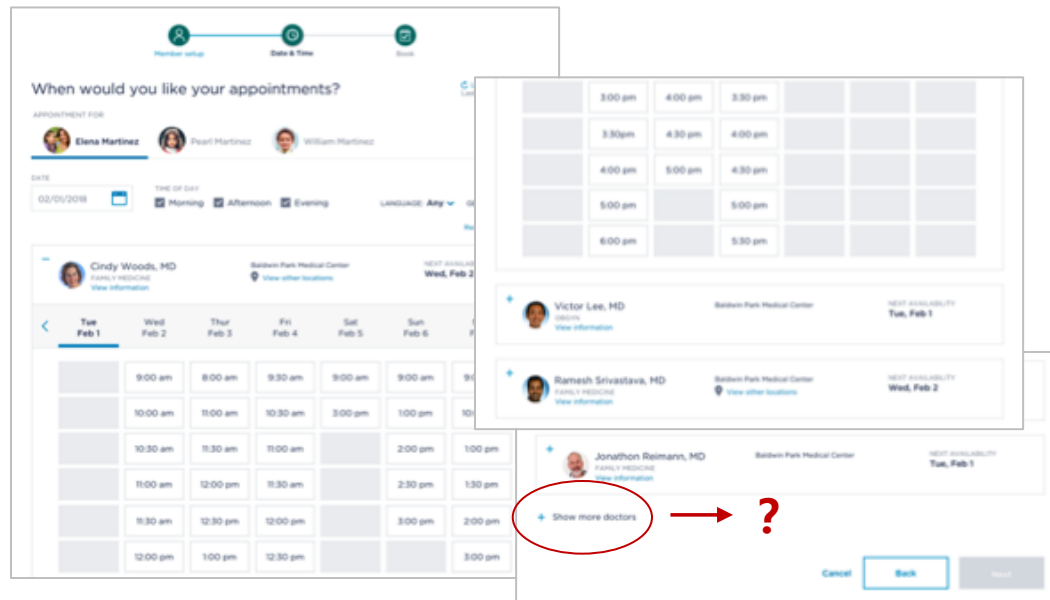
- Linear progression of steps within Member Setup likely contributed to expectations of a more linear process for scheduling times once users came to the Date & Time step



Date and Time Selection: Scheduling an Appointment

Discoverability of other doctors was an issue for some users; yet intuitive when discovered

- These users perceived only one block of times either for a single doctor or for the location they previously selected
- There was not an immediate sense of context (i.e. one doctor, doctors at facility, doctors beyond a single facility/location); a couple users thought “Show more doctor” might include doctors beyond a single location
- The ability to expand physician schedules one at a time was considered a useful, manageable approach to considering additional physician schedules as opposed to allowing users ability to scan multiple physician schedules at once



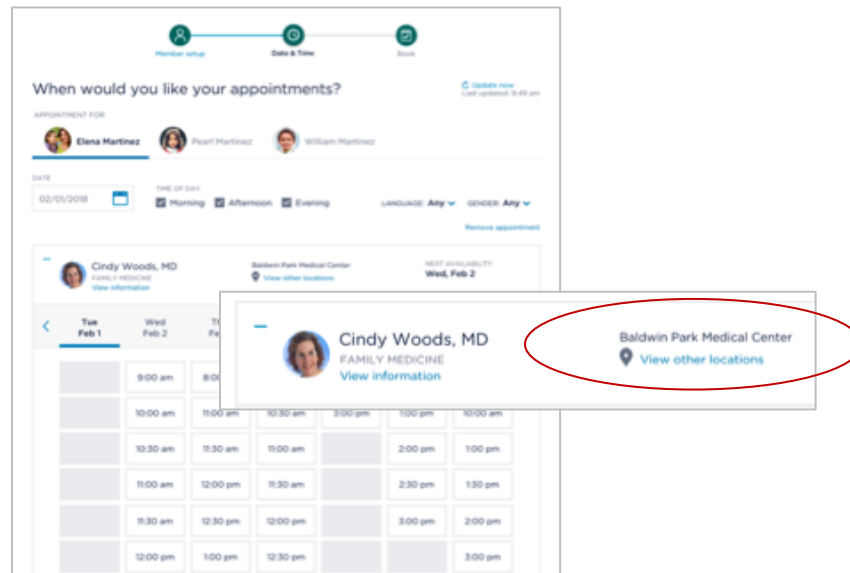
“If you showed all the times for every doctor it would be too much and confusing.”
George, 33

Date and Time Selection: Viewing Other Locations

Viewing times at other locations perceived to be associated with specific or edge case scenarios

- Overall, access to a care team physician at another location was thought to be a more likely scenario than looking for times at other locations regardless of physician preference
- Doctor practicing at other location → If appointment is personal in nature and can't see doctor at original location
- Accessing other locations → If there are opportunities to be seen at another location sooner when time is a factor

"If I needed to be seen sooner I might check another location, like if I live in Oakland but work in SF and might be able to squeeze in an appointment during the day or something." Katey, 40



"If I just needed to be seen I would switch to another day or see another doctor (at that facility). But I would go see my doctor at another location if it was more of a personal matter."

Katey, 40

Date and Time Selection: Scheduling Next Appointment

Most users sought to click “Next” to progress to the next appointment

- This expectation was consistent to how users progressed from one member to another in the Member Setup step
- Most users did not notice or focus on design elements, including member names and photos, above the filters
 - One users thought she was asked to select one appointment time for all three members, highlighting a lack of awareness of which member the appointment times pertained to

When would you like your appointments?

APPOINTMENT FOR
Elena Martinez Pearl Martinez William Martinez

DATE: 02/01/2018
TIME OF DAY: Morning Afternoon Evening
LANGUAGE: Any GENDER: Any

Cindy Woods, MD
Barbican Park Medical Center
NEXT AVAILABILITY: Wed, Feb 2

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9:00 am							
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3:00 pm							

Theodore Austin, MD
Barbican Park Medical Center
NEXT AVAILABILITY: Tue, Feb 1

Jonathon Reimann, MD
Barbican Park Medical Center
NEXT AVAILABILITY: Tue, Feb 1

Show more doctors

Cancel Back Next