

WISE Prescription Reimbursement Dashboard

Remote, Unmoderated Usability Test Results

Presented by Theresa Wilkinson



WISE Prescription Reimbursement Dashboard

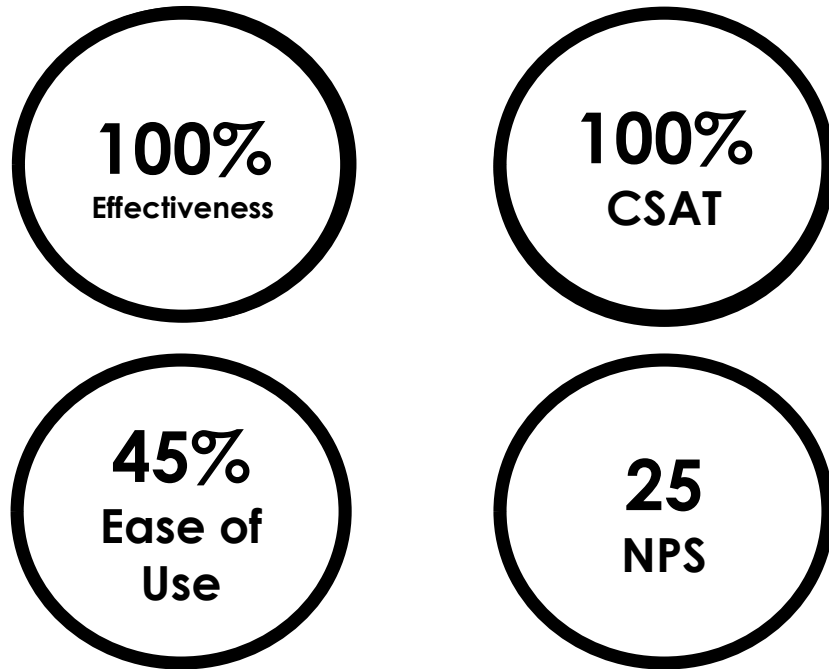


Agenda

1. Executive Summary
2. Feedback from the Survey
3. Feedback from Testing
4. Appendix

WISE Reimbursement Tool Dashboard

Overall Ratings



Recommendations

- Consider usability changes on the Waterfall screen.
- Consider screen-specific changes to give customers more information to positively impact their prescription reimbursements.

Executive Summary

- Today's prescription reimbursement complexities prohibit stores from knowing what their true reimbursement is and how to positively impact it.
- A tool to help pharmacies identify ways they can improve profitability and cash flow to remain open and financially successful.
- Users successfully completed tasks but struggled to understand chart information and identify key metrics, resulting in low ease-of-use and satisfaction ratings despite 100% task completion.

Key Insights

Testing: 11 participants

Technical Issues

- Axure side panel created confusion

UserZoom Issues:

1. Question bar at bottom of screen *may* have caused some users to not scroll
2. Screen freeze
3. 30 second delay on correct answer screen to progress to next question
4. Five-minute time limit (considered error) to progress to next question

Online User Behavior

- Impatient
- Did not read
- Short attention span *may* have prevented scrolling

Overall Ratings

- **100%** (11 of 11) of the participants were able to complete the tasks (Effectiveness)
- **45%** (5 of 11) of participants found the dashboard to be moderately easy to extremely easy to use
- **36%** (4 of 11) of participants were moderately satisfied to extremely satisfied (CSAT) with their experience
- **NPS 25** - Anything above 20 is considered "favorable"

Executive Summary



Task 1*

- 63% (24 of 38) Positive
- 21% (8 of 38) Missing Feature
- 16% (6 of 38) Usability

Recommendations

Usability Issues:

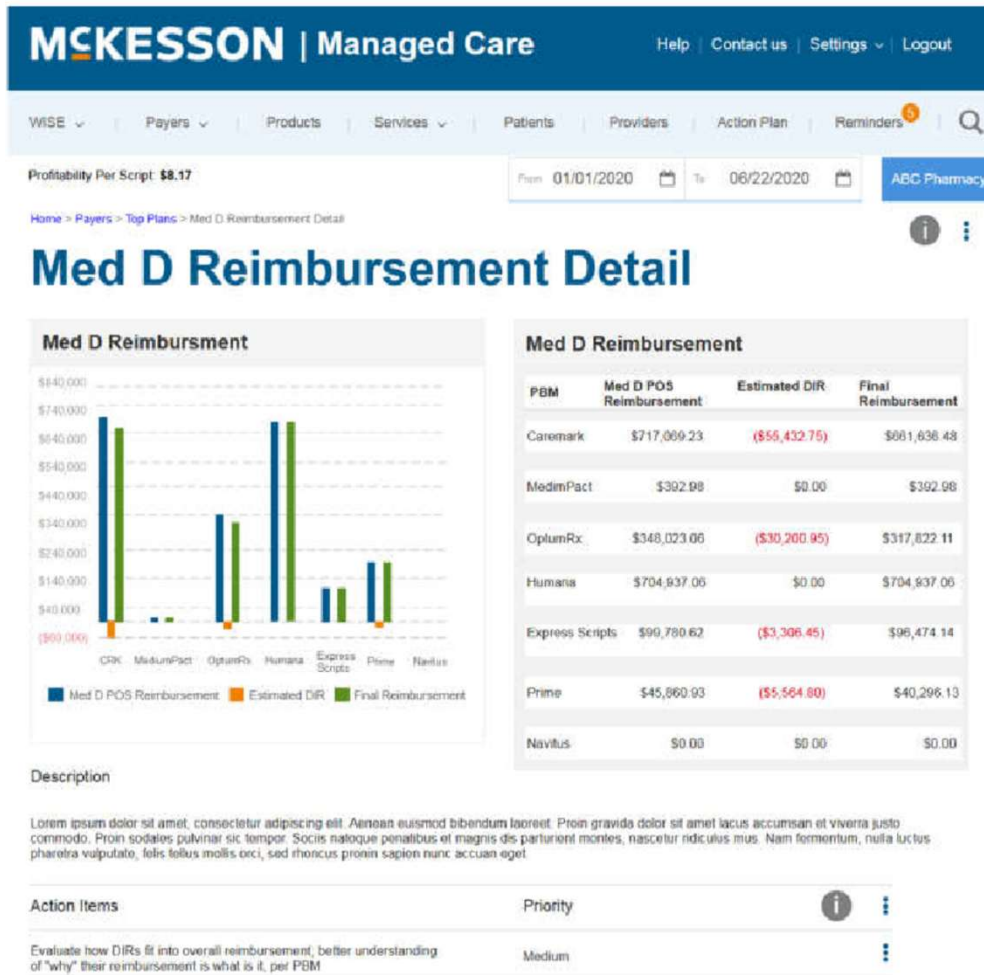
- Chart information is not clear
- Confusion understanding bar labels
- Not all bars have roll-overs
- More difference in waterfall colors

Recommendations for this screen:

- Do not mix total profitability and per script information on page
- Provide specific totals and equations used for waterfall chart
- Add costs and reimbursement to Underwater Claims
- Add Payer (NDC) information to Underwater Claims
- Add roll-over definitions on bars
- Aggregate by different lines of business
- Aggregate by top payers

*Not all information displayed so percentages may not add up to 100.

Executive Summary



Task 2*

- 50% (11 of 22) Usability
- 27% (6 of 22) Missing Feature
- 14% (3 of 22) Positive

Recommendations

Usability Issues:

- Chart names/information is not clear

Recommendations for this screen:

- Add table with total (#s) or roll overs on charts with totals
- Display overall profitability per claim
- Display profitability break out plan
- Display individual payer POS information
- View claim volume by total claims and by Payer
- Make charts drillable into detailed information
- View claim volume by profitability per script

*Not all information displayed so percentages may not add up to 100.

Executive Summary

MCKESSON | Managed Care Help | Contact us | Settings | Logout

WISE | Payers | Products | Services | Patients | Providers | Action Plan | Reminders

Profitability Per Script: \$8.17 From: 01/01/2020 To: 06/22/2020 ABC Pharm

Action Plan

Category	Subcategory	Chart/Table	Priority
Payer	Claim Growth	% Growth	High
Payer	Claim Growth	% Extended Day	High
Payer	Claim Growth	Avg Claim Volume Month	High
Payer	Top Plans	Reimbursement	High
Payer	DIRs	Estimated DIRs	High
Payer	DIRs	Estimated DIR Accrual	High

Actions | Chart/Table | Details

+ Add New Action Item

Action Items	Due Date	Assigned	Frequency	Progress	Notes
Manage cashflow, anticipated accruals					
Understand top PBMs performance requirements to impact dollars earned/improve performance efforts					

Product	MAC at the GPI	High
Patient	% Med D	High

< Prev 1 | 2 | 3 | 4 | 5 Next >

Task 3*

- 60% (15 of 25) Positive
- 24% (6 of 25) Usability
- 12% (3 of 25) Missing Feature

Recommendations

Usability Issues:

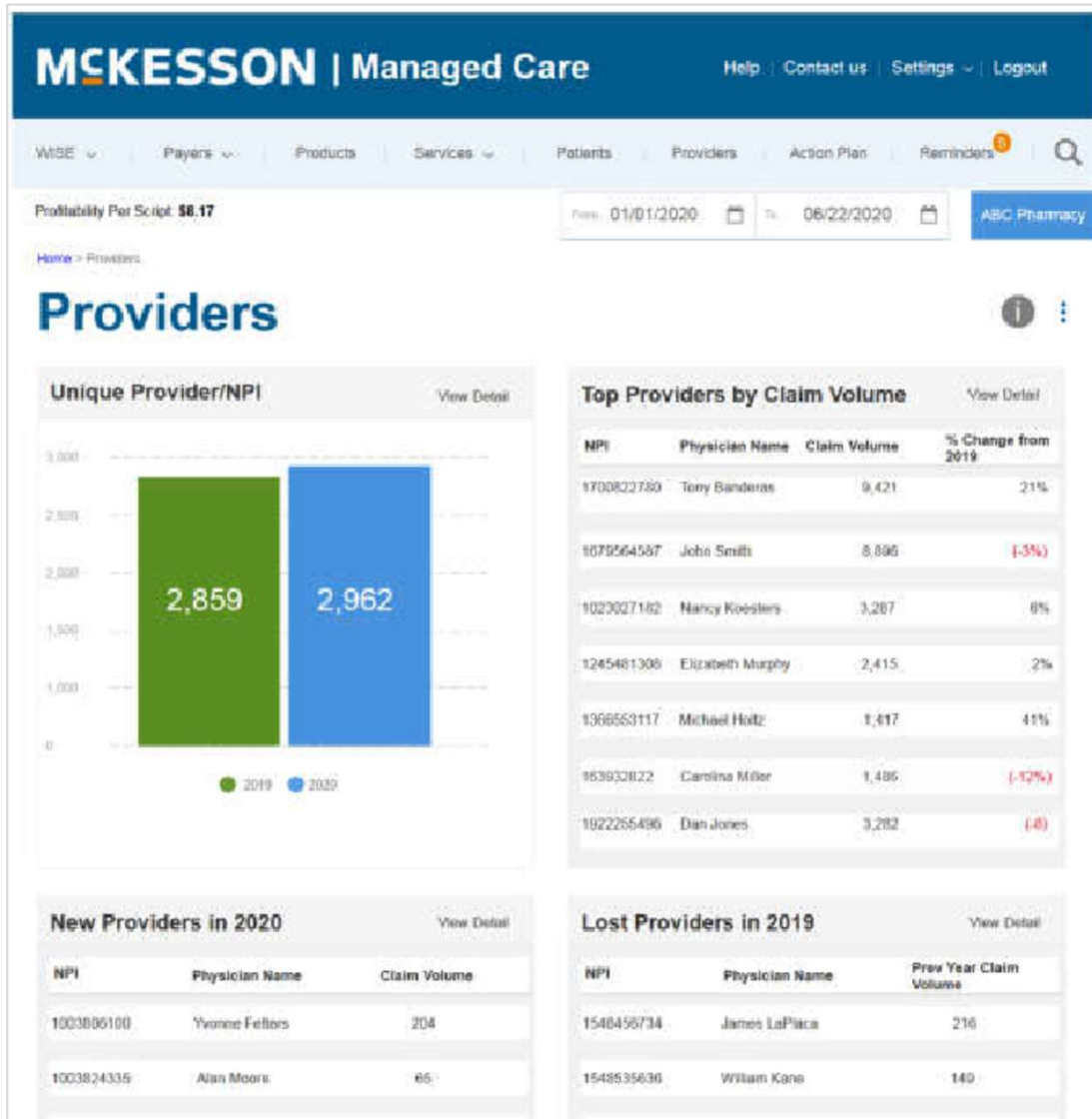
- Chart names/information is not clear

Recommendations for this screen:

- Add table with total (#s) or roll overs on charts with totals
- Display overall profitability per claim
- Display profitability break out plan
- Display individual payer POS information
- View claim volume by total claims and by Payer
- Make charts drillable into detailed information
- View claim volume by profitability per script

*Not all information displayed so percentages may not add up to 100.

Executive Summary



Task 4*

- 69% (9 of 13) Positive
- 33% (3 of 9) Navigation (positive)
- 23% (3 of 13) Missing Feature

Recommendations

Usability Issues:

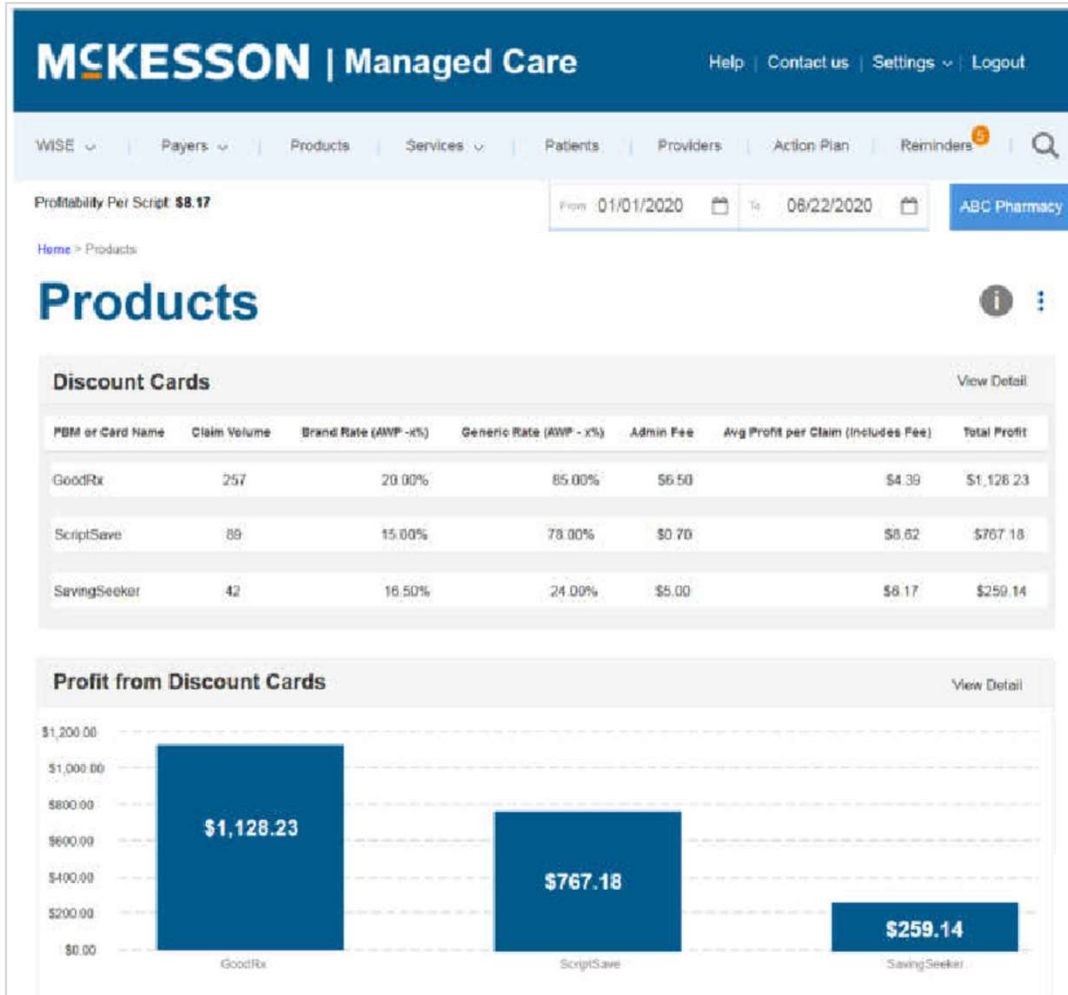
- Chart names/information is not clear

Recommendations for this screen:

- Add New patients by provider
- Add Number of patients by provider
- Define lost provider parameters

*Not all information displayed so percentages may not add up to 100.

Executive Summary



Task 5

- 90% (9 of 10) Usability
- 10% (1 of 10) Missing Feature

Recommendations

Usability Issues:

- Chart names/information is not clear
- Provide totals in charts

Recommendations for this screen:

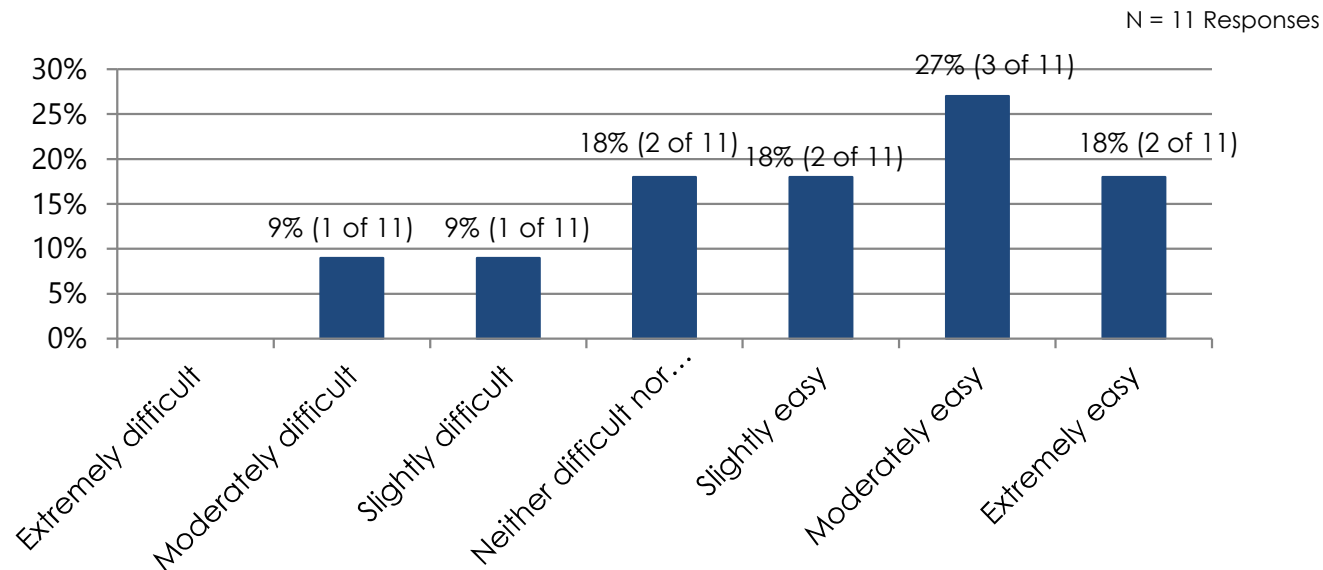
- Display discount cards as cost per script
- Rename category - "Products" is not obvious category for Discount Cards

Feedback from Survey



Ease of Use

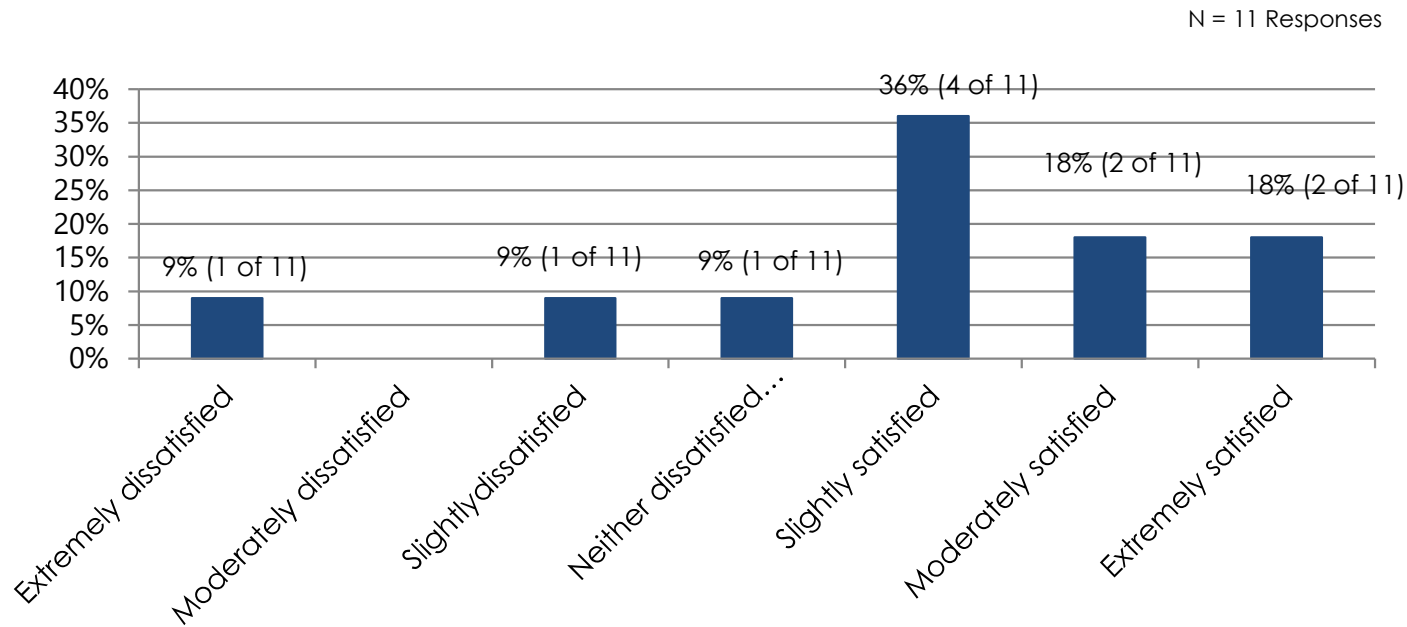
How would you rate the ease of using this dashboard?



- Measure: Evaluate product using SUPER User Experience Principles: Simple, User-Friendly, Predictable, Engaging, Reliable
- Goal: The percentage of users that rated ease 6 or 7
- **45%** (5 of 11) of participants found the dashboard Moderately easy or Extremely easy

Satisfaction

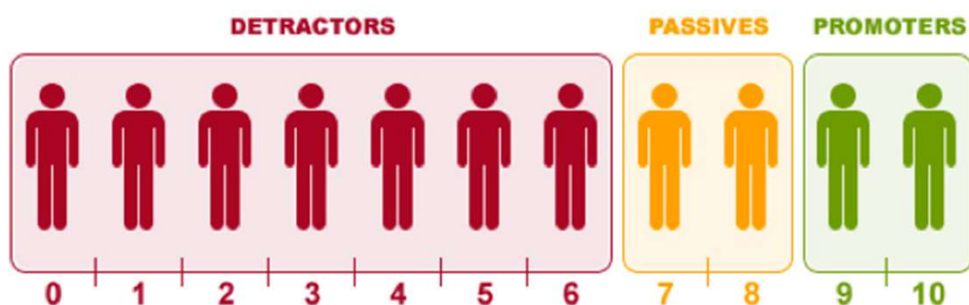
How would you rate the ease of using this dashboard?



- **36%** (4 of 11) of participants rated their Customer Satisfaction (CSAT) with the dashboard as either moderately satisfied or Extremely satisfied

Net Promoter Score (NPS)

How likely are you to recommend this website to a friend or colleague?



$$\text{Net Promoter Score} = \% \text{ Promoters} - \% \text{ Detractors}$$

NPS Score	% Promoters	% Detractors
25	50% (6)	25% (3)

This score, used jointly with comments, can help to discover problems and pain points within the product.

NPS stands for Net Promoter Score. It's a customer satisfaction benchmark that measures how likely your customers are to recommend your business to a friend.

NPS is a typical benchmark companies measure to evaluate and improve customer loyalty. NPS is different from other benchmarks, such as customer satisfaction score or customer effort score, in that it measures a customer's overall sentiment about a brand, versus their perception of a singular interaction or purchase.

Any NPS score above 0 is "good". It means that your audience is more loyal than not. Anything above 20 is considered "favorable". Bain & Co, the source of the NPS system, suggests that above 50 is excellent, and above 80 is world class.

Net Promoter Score (NPS) Improvements

Is there anything else we can do to improve your experience?

- 83% (15 of 18) Missing Feature
 - 66% (10 of 15) Chart information
 - 33% (5 of 15) Training
- 13% (2 of 18) Positive - Easy to understand; Easy to use
- 7% (1 of 18) Negative - Volume multiplier can be misleading

Recommendations

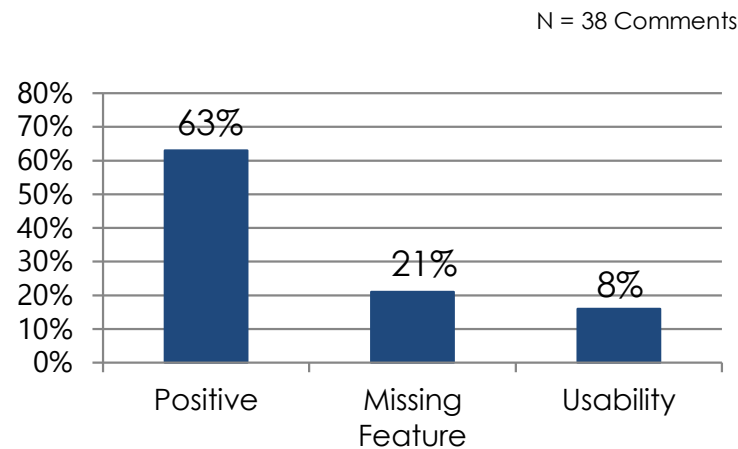
- Add Effective Rate Reports
- Add hover information on charts
- Add how my pharmacy is trending on a month-to-month basis
- Ensure charts are drillable into detailed information
- Display explanation for terms
- Display metrics used for totals
- Display profitability per script history
- Define volume multiplier
- **Training on how to use the dashboard**

Feedback from Testing



Task 1

What are your impressions of this dashboard?



*Information creates cognitive load meaning unnecessary demands are imposed on the user, making the task of processing information overly complex

Most participants did not scroll.

63% (24 of 38) Positive

- 17% (4 of 24) Waterfall Chart – Easy to understand
- 13% (3 of 24) Date Range – Easy to find
- 13% (3 of 24) Look & Feel - Pleasing
- 13% (3 of 24) Organization – Easy to understand
- 8% (2 of 24) Color Scheme - Pleasing

21% (8 of 38) Missing Feature

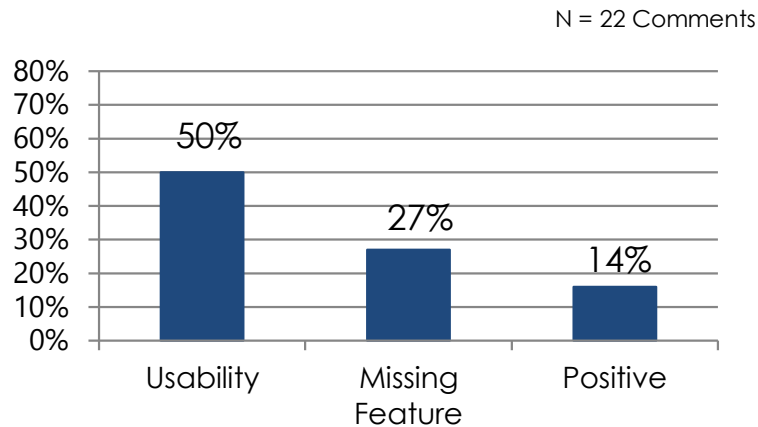
- 38% (3 of 8) Chart Information*
- Add costs and reimbursement to Underwater Claims; Add Payer (NDC) information to Underwater Claims; Roll-over definitions on bars
- 25% (2 of 8) Profitability per Script
- Aggregate versus by different lines of business; Aggregate versus by top payers

16% (6 of 38) Usability

- 67% (4 of 6) Chart Information*
- Chart information is not clear; Confusion understanding bars; Difficult to understand*; It's hard to tell what's the positive and the negative; Not all bars have roll-overs; More difference in waterfall colors

Task 2

What is your YTD POS reimbursement amount from Express Scripts?



*Information creates cognitive load meaning unnecessary demands are imposed on the user, making the task of processing information overly complex; Most participants did not scroll

50% (11 of 22) Usability

- 73% (8 of 11) Chart Information
 - 75% (6 of 8) Ensure users can find/understand desired information*
 - 13% (1 of 8) Define abbreviations
 - 13% (1 of 8) Chart names are not clear
- 18% (2 of 11) Organization - Search
 - Finding answer on 2 charts added to confusion*
 - "Quick look did not call out total ESI reimbursement. Assumption was all plans and had to dig for information."

27% (6 of 22) Missing Feature

- Chart Information
 - Display overall profitability per claim; Display profitability break out plan; Individual payer POS information; Add table with totals or roll over on charts with totals; View claim volume by total claims and by Payer; Make charts drillable; View claim volume by profitability per script

14% (3 of 22) Positive

- Chart Information – Easy to understand
- Underwater Claim Chart – Easy to understand; Easy to find

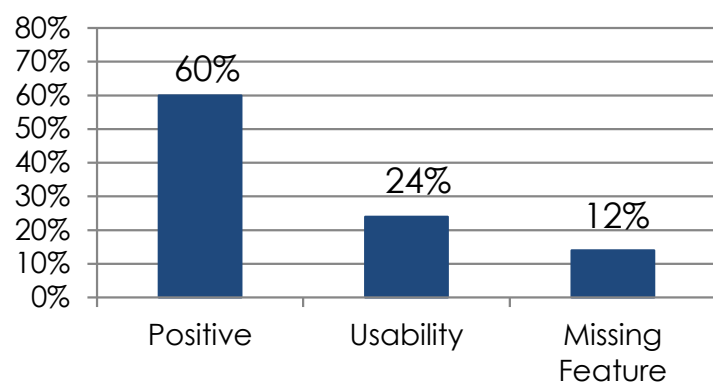
55% (5 of 11) of users looked for answer in the waterfall chart.

Not all information displayed, so percentages may not add up to 100%

Task 3

Please add your expected (\$6300) DIR accrual dollars for Q3 to your action plan.

N = 25 Comments



60% (15 of 25) Positive

- 40% (6 of 15) Page Information
- 67% (4 of 6) Clicked Add Action Item button
- 13% (4 of 14) Navigation

24% (6 of 25) Usability

Does not understand charts/labels meanings**:
Estimated DIRs, Billed DIRs and Worst to Billed DIRs;
Things you can work on to improve your profitability per script;
Did not understand label**;
Not intuitive**

12% (3 of 25) Missing Feature

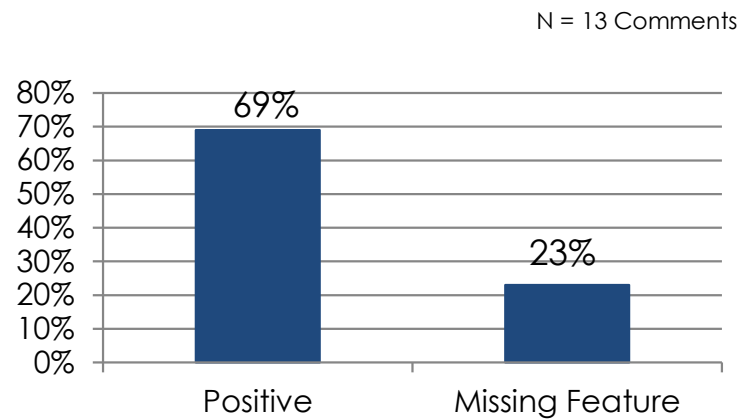
List the accrual amount needed for each Payer in table;
Display primary categories to monitor and enable users to add subcategories;
Display profitability per script history

Not all information displayed, so percentages may not add up to 100%

**On this task, participants did not remember the directions that "Some links and areas may not be fully functional" text (See WISE Usability Testing Research Plan Discussion Guide Final) and were frustrated when things did not work. Most participants did not scroll

Task 4

How many providers did you lose in 2020 compared to 2019?



69% (9 of 13) Positive**

- 33% (3 of 9) Chart Information
- “I can look by Claim Volume so that's kind of cool”
- “Can easily see that I'm up in four providers and down and three”
 - **23%** (3 of 13) Navigation
 - “So we're wanting provider information. So I will go to the Provider tab -- pretty straight forward”
 - “I will click on Providers, which was in the dashboard. They're easy to find again”

23% (3 of 13) Missing Feature

- Chart Information

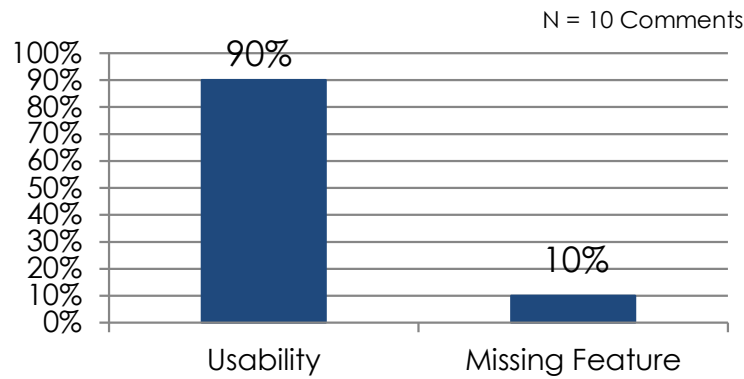
New patients by provider; # of patients by provider; Define lost provider parameters

Not all information displayed, so percentages may not add up to 100%

Most participants did not scroll

Task 5

How much money did you make with cash discount cards so far in 2020?



90% (9 of 10) Usability

- 82% (7 of 9) Navigation Label
 - Products is not obvious category for Discount Cards
 - “I’m going to go to Payers because I think I sell this under Claim Groups. So I think overall, this is, um, a really great dashboard. I don’t know if it makes sense (discount cards) to go under Products.”
 - “So it looks like discount cards are the only product so that is confusing to me. It’s almost like it’s a product that McKesson’s trying to offer that those two -- essentially another Payer type. So I don’t know...”
 - 27% (2 of 9) Chart Information*

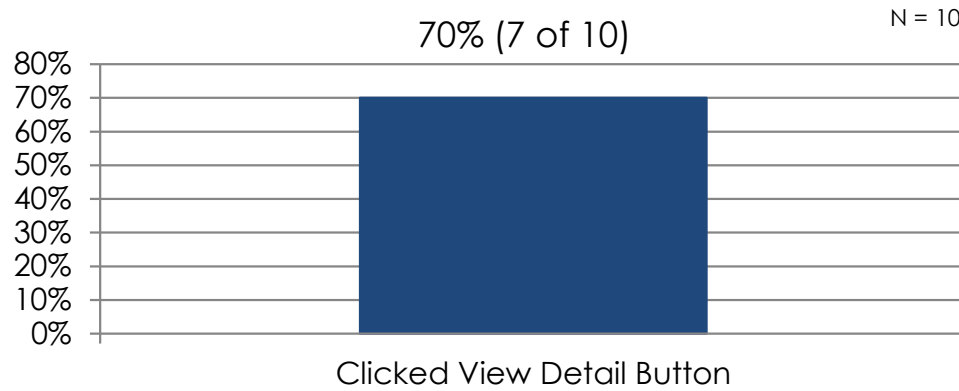
10% (1 of 10) Missing Feature

- Chart Information
 - Display discount cards as cost per script

*Information creates cognitive load meaning unnecessary demands are imposed on the user, making the task of processing information overly complex
Most participants did not scroll

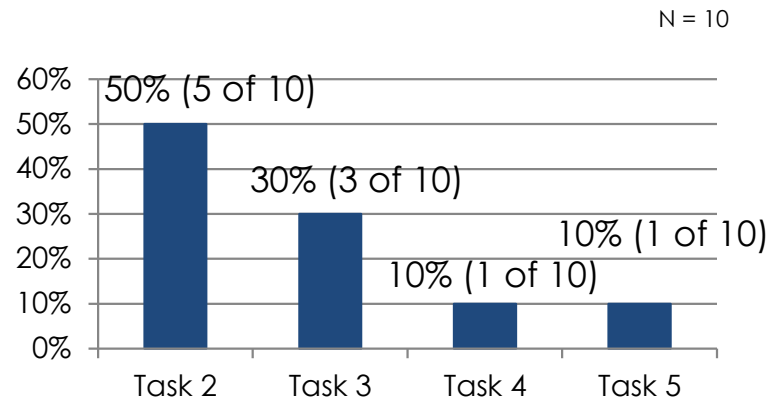
Clicked View Detail Button

How many participants clicked the View Detail button on a task?



Find Answer in Waterfall

How many participants tried to find task answer in the waterfall chart?



Research Questions & Answers

Research Questions & Answers

Research Question	
Can participants successfully complete the tasks?	Task 1 100% (11 of 11) completed the task. Task 2 100% (11 of 11) completed the task. Task 3 100% (11 of 11) completed the task. Task 4 100% (11 of 11) completed the task. Task 5 100% (11 of 11) completed the task.
How easy or difficult is it to complete a task?	Task 1 100% (11 of 11) of participants found the task to be moderately easy to extremely easy to complete. Task 2 27% (3 of 11) of participants found the task to be slightly easy to moderately easy to complete. Task 3 36% (4 of 11) of participants found the task to be slightly easy to moderately easy to complete. Task 4 18% (2 of 11) of participants found the task to be slightly easy to moderately easy to complete. Task 5 27% (3 of 11) of participants found the task to be slightly easy to moderately easy to complete.
How easy or difficult is it to use the prototype?	45% (5 of 11) of participants found the dashboard to be moderately easy to extremely easy to use

Research Questions & Answers

Research Question	
Are the labels easy to understand?	<ul style="list-style-type: none"> • Add roll-over definitions on bars • Chart names/information is not clear • Ensure chart labels are easy to understand • Rename category - "Products" is not obvious category for Discount Cards
Were participants satisfied with their experience using the prototype?	<p>36% (4 of 11) of participants were moderately satisfied to extremely satisfied (CSAT) with their experience</p>
Would the participant recommend the product to a friend or colleague?	<p>NPS 25 - Anything above 20 is considered "favorable"</p>
Did participants identify any improvements for any screens?	<ul style="list-style-type: none"> • Add Effective Rate Reports • Add hover information on charts • Add how my pharmacy is trending on a month-to-month basis • Ensure charts are drillable into detailed information • Display explanation for terms • Display metrics used for totals • Display profitability per script history • Define volume multiplier • Training on how to use the dashboard

Methodology
Test Questions
Survey Questions
Customer Satisfaction (CSAT)
Technical Issues
Videos

APPENDIX

Methodology

A usability testing is a UX research method that refers to evaluating a product or service by testing it with representative users. Typically, during a test, participants will try to complete tasks. The goal is to identify any usability problems, collect qualitative and quantitative data and determine the participant's satisfaction with the product.

Remote, unmoderated usability testing is not monitored or guided, so there's no one else present during the study except the participant. The participant completes any tasks and answers questions at their own pace, on their own time, at a time and location of their choosing.

Unmoderated testing tends to be faster as participants can complete their tests at any time without any disruption to your daily workflow. Everything about the interaction can be recorded, including a recording of what the testers did on-screen, and their facial expressions captured by their webcam.

Test Questions

1. What are your impressions of this dashboard?
2. You own a small pharmacy that processes only 3,000 claims per month. On Monday, you serviced five different patients that had Express Scripts as their insurer and it seems like you lost money on all of them. You are wondering if Express Scripts is a big part of your business or can you afford to drop it and turn those patients away. **What is your YTD POS reimbursement amount from Express Scripts?**
3. You are very adept at managing cash flow, and already know that Caremark is one of your biggest plans. Since Caremark collects for four months of DIRs over an eight-week period, you see a big drop in your bank deposits during Caremark's collection period. You don't want to be caught short and not be able to make payroll. **Please add your expected (\$6300) DIR accrual dollars for Q3 to your action plan.**

Test Questions - Continued

4. You have made special efforts to show the providers in your area the benefits of having their patients fill prescriptions at your store. You have shared your adherence scores with them and highlighted some of the support literature you have for your diabetic patients. You are wondering if your top providers from 2019 still sending you as many patients. **How many providers did you lose in 2020 compared to 2019?**
5. You have been in business for over 20 years and really don't like using cash discount cards. You know they are necessary, but still harbor some resentment over getting a rather large bill from Envision for admin fees for a patient who was using a card he didn't even realize was a cash discount card. You are wondering how many claims you are processing for that are based off a cash discount card and if they are all that profitable. **How much money did you make with cash discount cards so far in 2020?**

Survey Questions

Q 1 – How would you rate the ease of using this dashboard?

Extremely Difficult	Moderately Difficult	Slightly Difficult	Neither Difficult nor Easy	Slightly Easy	Moderately Easy	Extremely Easy
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Q 2 – Overall, how satisfied are you with your experience?

Extremely Dissatisfied	Moderately Dissatisfied	Slightly Dissatisfied	Neither Dissatisfied nor Satisfied	Slightly Satisfied	Moderately Satisfied	Extremely Satisfied
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Q 3 – Overall, how likely are you to recommend this dashboard to a friend?

Extremely Dissatisfied	Moderately Dissatisfied	Slightly Dissatisfied	Neither Dissatisfied nor Satisfied	Slightly Satisfied	Moderately Satisfied	Extremely Satisfied
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Q 4 – Is there anything else we can do to improve your experience with this dashboard?

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Customer Satisfaction (CSAT)

Customer Satisfaction is calculated by adding the percentage of participants that rated the question as moderately (6) or extremely (7); it is reported as a percentage from 0 to 100%.

While CSAT scores vary by industry, a good score will typically fall between 75% and 85%. Since CSAT measures only your promoter scores, it's difficult to obtain a near-perfect score. Having a score of 75% means that three out of every four customers gave you a positive score instead of a negative or neutral one.

	Rating	# of Participants
	1	1
	2	0
	3	2
	4	2
	5	4
	6	2
	7	2
Total		11

} 36%

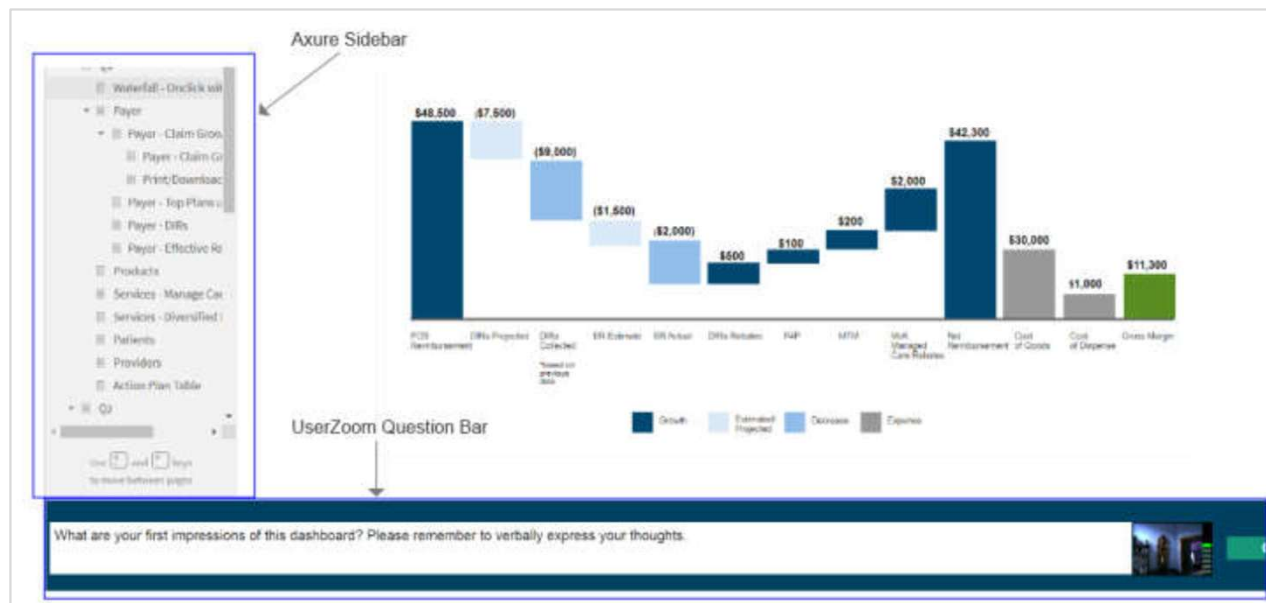
Technical Issues

Axure Prototype

- Axure side panel created confusion

UserZoom Issues

1. Question bar at bottom of screen caused some users to not scroll down the screen
2. Screen freeze
3. 30 second delay on correct answer screen to progress to next question
4. Five-minute time limit (considered an error) to progress to next question



Technical Issues - continued

Hi!

Thanks for your interest in this study. Before we get started, let's review some key points and tips.

1. Make sure you're in a **quiet environment** with good lighting and a stable surface.
2. If required for the test, make sure **your audio is turned on** to record your comments.
3. We will ask you to **verbally express your thoughts**, to think out loud, while you are experiencing a website or an interactive prototype.

There are no wrong answers - we want your honest and thoughtful feedback. It's what helps us improve, so be loud and proud!

Tip: Prototypes are concepts that are not live websites yet. Some links and areas may not be fully functional, but do not dwell too much on these.

This study should take about 15 minutes. There are four tasks to complete including an introductory question. Please remember to **read all tasks aloud and verbally express your thoughts**.

Ready? Click "Agree and Continue" to start!

[START STUDY](#)

Videos

Task 1

- Positive
- Negative

Task 2

- Positive
- Use Waterfall
- Cognitive Load

Task 3

- Positive
- Negative
- Chart Labels
- Use Waterfall
- Add Action Item Button Not Functioning

Task 4

- Positive
- Screen Freeze
- 30 Second

Task 5

- Positive
- Cognitive Load
- Use Waterfall
- Navigation Label