

Jotter Research Plan

Purpose/Problem Statement

This research will inform the new designs for the Jotter tool. We will seek to understand how users use the Jotter tool and how the Jotter tool might be improved.

Overall Research Objectives:

- How do providers currently use the Jotter tool?
 - When do they use the Jotter tool and what do they document?
 - Are they using our global jotter images? Is there any pattern/consistency to the types of images that they use?
- What changes to the Jotter tool might improve the user experience?
 - Would providers want to upload their own templates or images to use with jotter?
 - Would the ability to view multiple images at once be beneficial?
 - Would having a location for more extensive documentation related to the drawing be useful?

Approach

- Analysis of existing research
- Interviews with clients

Feature set and problem statements

Feature	Key Problem	Impact	Status
New Jotter Interface & drawing pane.	Users currently have a small drawing space with limited functionality.	High	IN PROGRESS
Multi-select dropdown to select pre-uploaded templates	All pre-uploaded drawing templates saved to jotter local table are displayed as a checkbox for which users must go through before selecting a template. The list of templates further reduces the drawing space.	High	IN PROGRESS
Uploading Patient/Procedure Images or Custom Templates onto Jotter.	Users cannot draw on patient images which they upload through AthenaCapture. Users cannot draw or annotate on a patient image that they upload in an encounter using the add document section. Further they need to manually tie in the image after uploading to the current encounter.	High	IN PROGRESS
Zoom-in/out of a Jotter Drawing.	Users do not have adequate drawing precision due to the small size of the drawing space.	High	IN PROGRESS
Drawing tools to draw shapes such as line, arrow, triangle & circle.	Users cannot draw different shapes such as boxes, arrows, triangles and circles. They waste precious time by manually drawing such shapes even for small annotations.	Medium	IN PROGRESS
Redoing and Undoing a previous action.	Users cannot undo/redo an action. If they make small errors while drawing, they either need to use the eraser tool, which is difficult to use, or they must clear the entire drawing and start again. Consequently, users need to manually draw small items while marking repeat annotations, which wastes time and increases user clicks while documenting the image.	Low	IN PROGRESS
User defined labels for marking frequently annotated terms such as Lesion, Biopsy etc. (labels defined at practice level)	Clinicians (esp. dermat) waste precious time labeling their marks with qualifiers like biopsy, lesion etc., often resorting to shorthand/acronyms to describe their drawings. These clinicians often use the same cases where they will reutilized/reuse the same annotation repeatedly for each encounter.	High	RESEARCH
Copy Jotter drawing from a previous encounter to a new encounter.	Clinicians waste precious time when they need to open a previous encounter and refer to the Jotter drawing for a patient when the patient comes back for a later visit. Sometimes clinicians want annotations from a previous encounter to be copied to a new Jotter drawing made during a new encounter.	Medium	RESEARCH

Data Collection

First Name/Last Initial/date	Role	Practice Type/Size	Document	Highlights
Jon Azzariti 14 Jun 2022	Internal Provider, Patient Safety Lead		Jon Azzariti 6-14 Interview Notes.docx	
Jill Fields 15 Jun 2022	PAC, Clinical Quality Director			Meeting Cancelled.
Todd Clark 15 Jun 2022	Internal Provider		Todd Clark 6-15 Interview Notes.docx	
Janice Johnson 24 Jun 2022	Physician (Gyne)			No Show
Peter Sutherland 01 Jul 2022	Physician (General Practice)			No Show
David MacGregor 29 Jun 2022	Physician (Dermatology)		Dr MacGregor Interview Notes.docx	
Michael Rossen 24 Jun 2022	Physician (Neurology)		Michael Rossen Interview 6-24.docx	

Milestones

PO	Yash Vardhan Kasana
Designer(s)	Colby Cho
Elevator Pitch	This research will inform the new designs for the Jotter tool. We will seek to understand how users use the Jotter tool and how the Jotter tool might be improved.
Status	DOING
Related initiative or design project	
JIRA	
Timeframe	6.24
Relevant Zone	Clinicals

Key Artifacts

Document Name	Last Updated
Jotter Interview Script.docx	
Jotter Feature List + impact.xlsx	
Jotter Survey Results.pdf	

Activity	What and Why	Current Status	Target Delivery	Files
Planning/kickoff	Define research objectives and recruiting strategy/needs	DONE		
		DONE		
VoC Analysis	Identify themes from VoC reports, client issues, etc.	WIP	12 Jun 2022	
Internal documents analysis	Desk research related to the topic	WIP		
Recruiting	Internal and External Providers, specialists who use Jotter	DONE		
Internal Interviews		DONE		
Problem Identification/Analysis	Final feature set and problems that the features will be solving.	DONE		