

## Creating a Clinical Reminder Dialog Template

This Playbook will help you apply a Human Centered Design Process as you create a Clinical Reminder Dialog Template.

As part of organizing your project, review the Process and associated Methods. Use the Guidance at each phase of the process to help determine where your time and effort is best spent based on your own project goals, time lines and competing priorities.

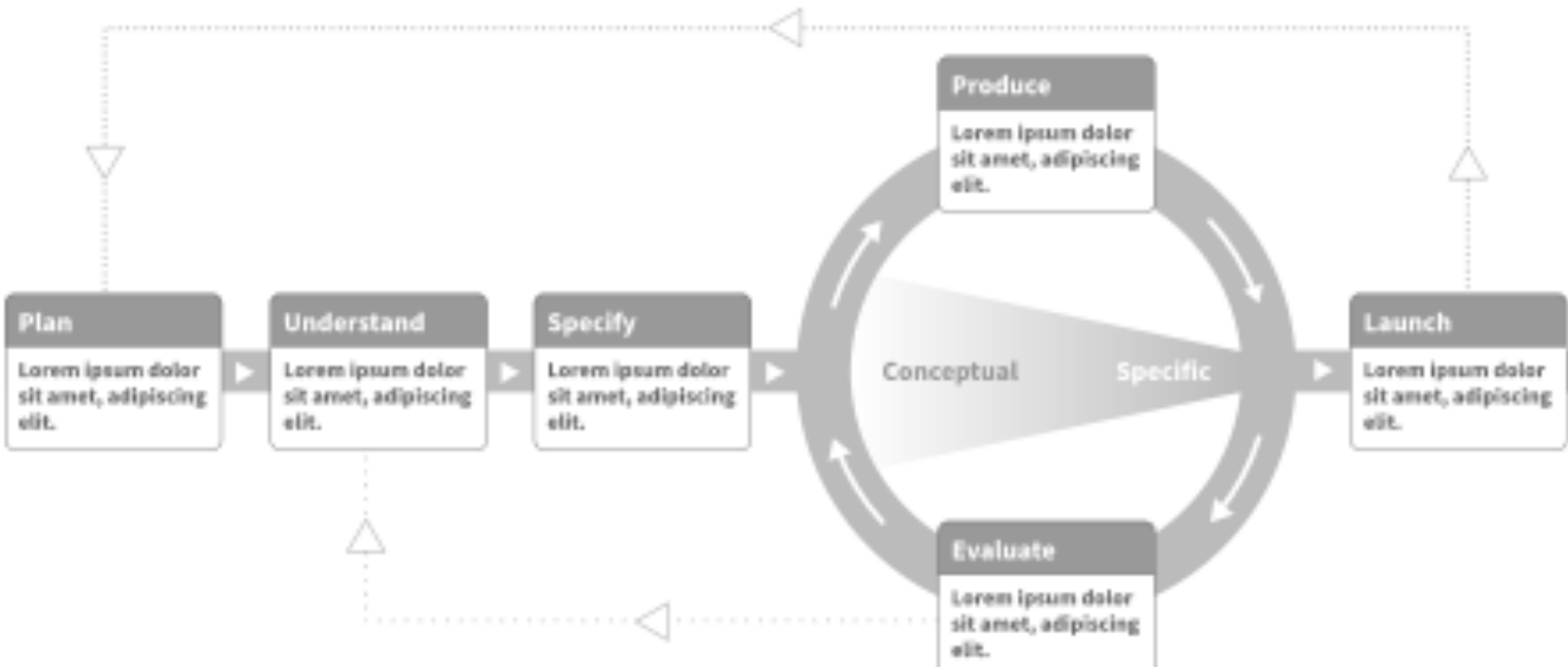
### OVERVIEW

#### Adhering to a Process

It is important to adhere to a process! If your desired outcome is a safe, usable, effective, and/or efficient Clinical Reminder Dialog Template, then you must organize your project with a process that aims to achieve any one of these desired outcomes.

The UX process is illustrated below. It is a basis for including human-computer design activities. As a Clinical Reminder Dialog Template is defined, designed, and developed, certain phases of the UX process should be carried out — sometimes several times in a project life cycle.

Some phases can be repeated, as the result of iterative refinement of the solution. Phases are performed whenever certain outcomes are needed, and the degree of rigor when performing each phase can vary based on risk, context, and overall requirements.



### Plan

The plan phase is focused on identifying the project’s objectives and setting the stage for successful project completion.

Planning entails getting answers to fundamental questions:

- What is the problem that the CRDT aims to solve?
- What is the scope of the project?
- What is the timeline?
- What activities and resources will be needed to see the project through?
- By what measure will the team know in the end that the project was a success?

The first step is to identify the stakeholders. The stakeholders will likely include the individual(s) making the work request. Other stakeholders may include individuals that will use the template and/or those that will use the generated note. Sometimes management will need to be included to determine if there are impacts to other areas that need to be considered.

Next, schedule and conduct a kick-off meeting, and develop a problem statement. Although these activities are probably familiar to you, the information provided here is meant to best practices and tools that will support your work.

The kick-off meeting is a good time to:

- Clarify the work request and document the details.
- Draft a problem statement.
- Gain stakeholder agreement on the scope of the project
- Establish a timeline to set expectations.
- Inform stakeholders of their responsibilities, and when their input is needed.
- Identify additional inputs that are required.

If some stakeholders are not able to attend the meeting, you can meet with them individually. However, this approach is not ideal. The group setting best supports the most important activity - getting everyone to agree the task, the timing, and the responsibilities.

Finally, it is of utmost importance that the decisions and agreements made in the kick-off meeting are communicated in writing to all parties involved.

In the sections below, there are links to methods, examples of completed work products (artifacts), and tools, including a template for setting an agenda for a kick-off meeting. Use these to move through the plan phase.

**Checklist:** When you are finished with the Plan Phase, you will have —

- ☐ Identified stakeholders.
- ☐ Conducted a kick-off meeting.
- ☐ Drafted a problem statement.

#### Recommended Methods

[Problem Statement](#)

#### Example Artifacts

[Sample problem statement](#)  
[Sample kick-off meeting agenda](#)  
[Sample timeline](#)

#### Tools

[Agenda template](#)  
[Timeline template](#)  
[Problem statement template](#)

### Understand

### Specify

### Produce

### Evaluate

### Measure

#### Other playbooks you might be interested in:



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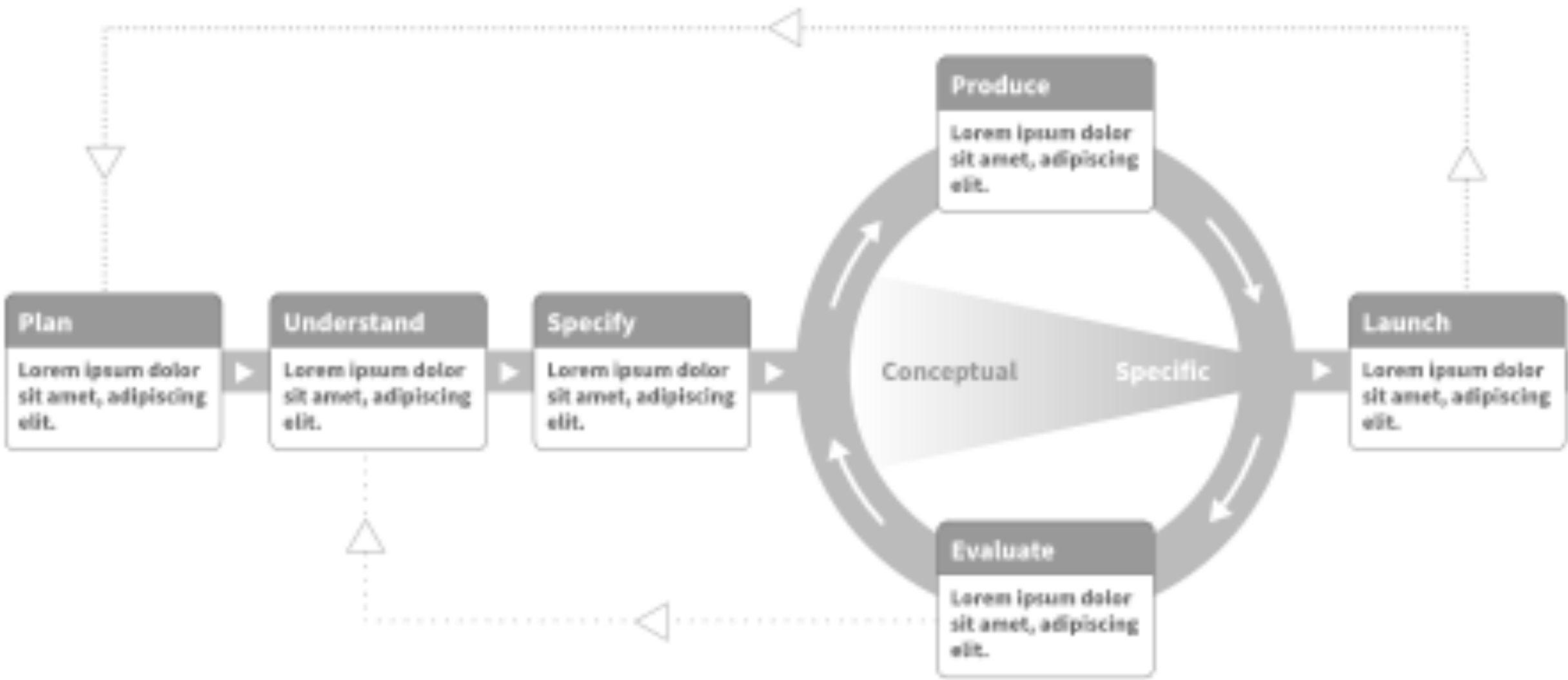
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Plan

Understand

Specify

Produce

Evaluate

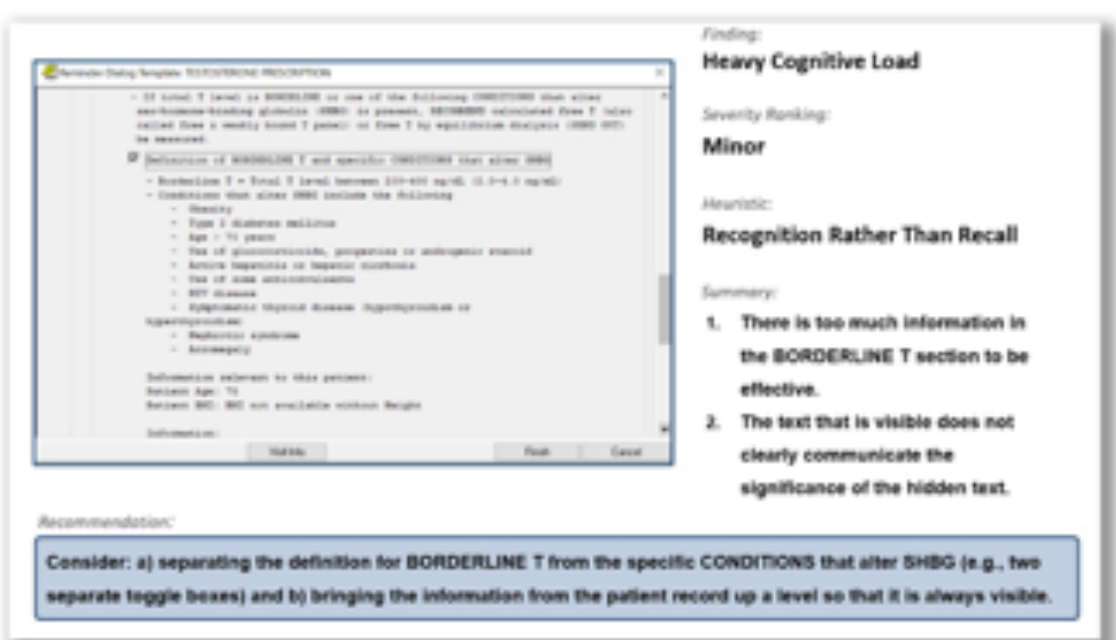
The evaluate phase is focused on determining the degree to which the current design is meeting the quality objectives set by the team at the start of the project.

Human-centered design is generally thought of as an iterative process. As a result, evaluations of one kind or another are often conducted at several stages in the development of the design, from the early mockups all the way up to a fully coded product.

Evaluation supports CRDT development by providing the following:

- A check against the original set of requirements.
- A check to see if it meets best practices for clinical reminders.
- A check to see if there are any usability concerns.
- A set of recommendations for design improvements.

The evaluation method recommended in this playbook is called a Heuristic Evaluation. With this method, the CRDT is evaluated against a set of principles or rules of thumb called heuristics. When elements of a CRDT violate one or more of these principles, the expectation is that usability issues will likely be encountered if the product is deployed without repair.



**Figure:** A heuristic evaluation is typically delivered in a report with screenshot, a description of the issue, the heuristic that was violated, a severity ranking, and a recommendation.

**Checklist:** When you are finished with this step, you will have —

- ☐ Verified that the reminder produces the intended data for reporting.
- ☐ Evaluated each screen to identify usability concerns and issues.
- ☐ An action plan to improve the design.
- ☐ A report that documents these activities for the stakeholders.

Recommended Methods

Heuristic Evaluation

Example Artifacts

[Sample data and test protocols](#)

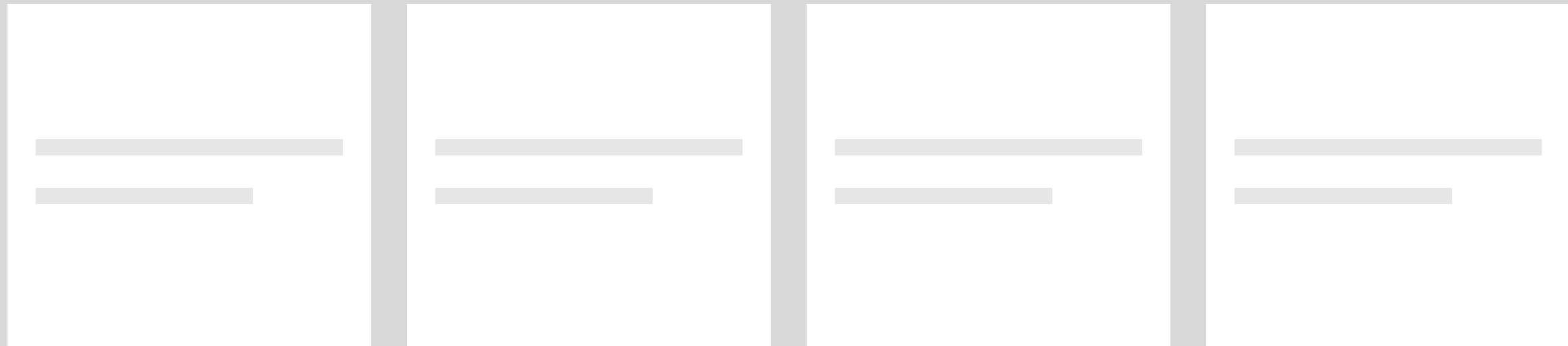
[Heuristic reports](#)

Tools

[Heuristic checklist](#)

Measure

Other playbooks you might be interested in:





< Back to CRDT Playbook

Heuristic Evaluation Method

A usability evaluation method in which one or more reviewers, preferably experts, compare a software, documentation, or hardware product to a list of design principles (commonly referred to as heuristics) and identify where the product follows and does not follow those principles.

Recommended Uses:

To identify issues within the operational environment of the system when pre-existing design solutions and/or those of the competitors are available. When: during the Understanding Phase.

To evaluate versions of the user interface at one or more timepoints during the iterative design cycle. When: during the Evaluation Phase.

Outcomes:

A list of potential usability problems along with their associated design violations, typically categorized by severity and illustrated with screenshots.

Limitations:

Does not include interaction with intended users of the product or application. As a result, it may identify issues that are not pertinent to the intended user and may miss issues that impact end user performance.

Not a substitute for a usability test, as the two methods often uncover different types of usability issues.

Skills and Experience:

Usability experts identify more issues than non-experts, but with training, non-experts are able to identify usability problems.

A domain expert is needed to assess technical applications or products.

Approach

Do It Yourself

See how to do it with our How-To guide:

Learn How

Need a hand? HFE offers consultations and assistance. Contact us to learn how we can help.

Get Help

How To Do It

Introduction

To conduct a heuristic evaluation, evaluators walk through a set of tasks or scenarios with the user interface to identify violations of usability principles, or "heuristics." Researchers and usability practitioners have developed sets of heuristics that focus on different user interaction goals. These principles should be considered guidelines or "rules of thumb" for designing the user interface, not standards or requirements.

A heuristic evaluation is generally conducted with at least two evaluators. Each evaluator completes their review independently. One evaluator might see problems that the other misses, or they each may have different thresholds for what constitutes an issue in their mind.

The reviews will be merged into one final document. The merging process should be done in a meeting with all evaluators present. All evaluators should have the opportunity to weigh in on what does and does not get included in the final draft. Although the lead may have final say on disputed issues, the group should strive to arrive at consensus.

As a preliminary step, it is highly recommended that evaluators acquaint themselves with the heuristics that will be used in the evaluation. The set of heuristics employed is the research team's choice — there are options. However, we strongly recommend using the General Design Principles for EHRs because it was specifically designed with health IT applications in mind.

When studying the heuristics, it helps to consider how they will be put into use. For each step in a given task, the evaluator should consider whether the design violates any of the 14 heuristics. In other words, for every step the user is expected to take with the interface, the evaluator must ask themselves 14 questions. Does this step honor or violate principle No. 1? Does this step honor or violate principle No. 2? The process will quicken and become more automatic with practice.

Procedure

Foundational Steps (typically the responsibility of the lead evaluator)

1) Identify the intended user and the scenario of use.

Who will use the product and in what context?

2) Identify a set of fundamental tasks

that the users must be able to accomplish to make the product successful.

3) Ideally, break down the task into the required steps in advance of the review (e.g., in a task analysis).

If this step is not completed, the evaluators will be required to do this less formally while completing the evaluation.

4) Select an instrument

Typically a Microsoft Word or PowerPoint template — including the set of heuristics that will be employed and the criteria for severity ratings. (Samples are provided below.)

5) Distribute materials to the evaluators.

Evaluation Steps

1) Walk through the task steps

For each step make a judgment as to whether a heuristic has been violated.

2) When a heuristic is violated, describe the issue

on a Findings Page in the chosen instrument. The description should be accompanied by a:

a. Screen shot of the issue

b. Severity ranking that indicates the severity of the issue in terms of its expected impact on successful use of the product. The template should provide criteria to calibrate these judgments

c. Recommendation for how to resolve the issue

Compile the Findings

1) Meet to walk through each evaluator's findings.

Each evaluator should describe the issues he or she found.

2) Come to consensus in the meeting

on the quantity and severity of issues, the heuristics violated, and design recommendations.

3) Compile a final document

that represents the group's review.

4) Deliver to customer and/or to the design team.

Tools

Below are two instruments that can be used to conduct a heuristic evaluation. Both are the same in terms of underlying approach (heuristics used, criteria for severity rankings, and the general procedure). Choose according to the format preference for your team.

Heuristic Evaluation Data Collection Instrument (Word)

Heuristic Evaluation Data Collection Instrument (PowerPoint)

Beginners may find it challenging to keep all the heuristics in mind while stepping through the task. An alternate approach is to search the interface for usability issues, and then associate the issue with a heuristic violation. Download a cheat sheet that can be printed while conducting your review.

Heuristic Evaluation Cheat Sheet (PDF)

Author

Sources

References

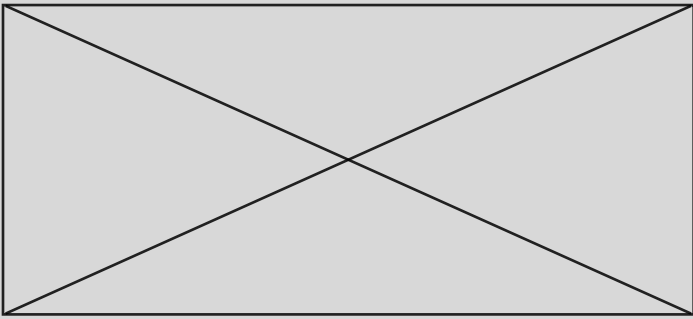
Glossary Terms

Similar Methods:

The User Experience Guide for Veterans Health Administration (VHA) Systems helps VHA project teams create easy-to-use health information technology (HIT) systems by focusing on users and their needs.

- Explore **user experience** (UX) and learn how consideration of a user’s perceptions and responses to a system, product, or service can be leveraged to improve design.
- Incorporate principles and practices of **human-centered design** (HCD), an approach to systems design and development that aims to make interactive systems more usable.
- Improve the value of your products.

How to Perform Heuristic Evaluation



Watch a video that shows how to identify usability flaws based on visual design principles and best practices.

Research Users

Understand how people want to use what you build by studying their goals and environment — and increase satisfaction and efficiency.

Create Designs

Produce products that are accessible to all types of people and follow design best practices so they can achieve their goals.

Test Designs

Get feedback from users and experts throughout the development process to improve the end result.

Get Started with UX

Learn how user experience practices can benefit you and the people who use what you produce.

Fundamental Concepts

UX Process

Training

Establish a UX Program at Your Facility

Make UX a part of your strategy and you’ll quickly see the value it adds. Training programs can help.

Establishing Value

Team Training

Share Your Ideas

Send us feedback to help us better serve you.

Get in touch

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Submit your ideas

[Home](#)

## Underlying Principles

## Establishing Value

## Design Thinking

- 

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## Training

Make UX a part of your strategy and you'll quickly see the value it adds. Training programs can help.

## Team Training

Send us feedback to help us better serve you.

Interested in contributing to the UX Guide?

## Submit your ideas

# User Experience Guide for VHA Systems

## Overview

## Plan

## Evaluate

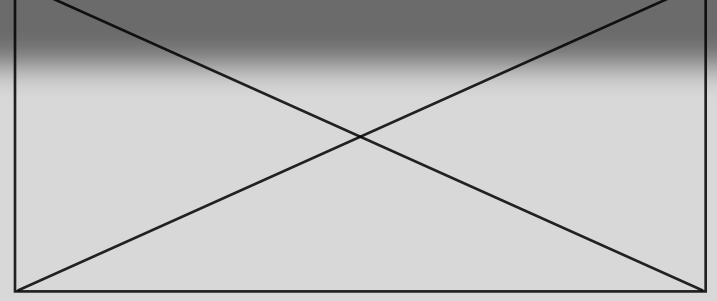
## Iterate

Produce

## Understand

## Measure

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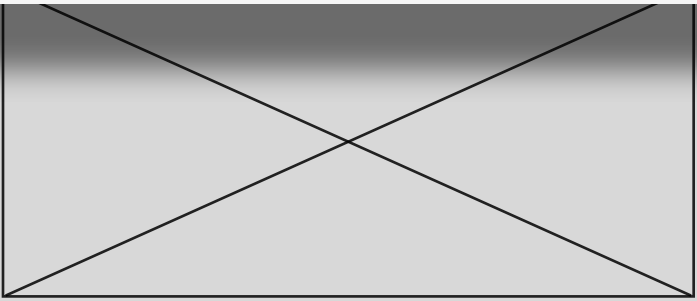
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Fundamental Concepts

UX Process

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## Fundamental Concepts

## UX Process

## Training

The diagram consists of a light gray rectangular background. At the top center, the text "Establish a UX Program at Your Facility" is written in a bold, dark gray font. Below this text, centered horizontally, is the sentence "Make UX a part of your strategy and you'll quickly see the value it adds. Training programs can help." in a smaller, regular dark gray font. At the bottom of the diagram, there are two light gray rectangular boxes with thin dark gray borders. The box on the left contains the text "Establishing Value" in a bold, dark gray font. The box on the right contains the text "Team Training" in a bold, dark gray font. The two boxes are positioned side-by-side, separated by a small gap.

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**Establishing Value**

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[Resources](#) > Playbooks

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- FAQs

## Playbooks

A Playbook is a set of UX Methods described in the context of the UX Process that are specifically designed to help solve problems faced in medical centers throughout the VA.

### Benefits of Using a Playbook

Teams that use Playbooks are trained not just on the coding feature, but on process, principles and methods that work to make projects successful and result in safe, effective, and efficient features.

When you have time constraints, ambiguous requirements, or other competing priorities, the Playbook can help you make decisions about what you can do; not what you can't do in order to get the biggest impact from the UX Method(s) you decide to use.

### How to get started?

Find the Playbook that fits your project...

Creating a Clinical Reminder Dialog Template

Creating Order Sets

Improving the Efficiency of a Clinical Workflow

### Playbook request?

Do you have an idea for a playbook that would make your job easier? [Tell us about it!](#)