**Page ID**: **#.# Clinical Reminder Playbook**

# Primary Content

**Title**

Enter the page title here (REQUIRED).

**Clinical Reminder Dialog Template Playbook**

**Intro**

Enter the intro here (REQUIRED).

This playbook will help you apply a human-centered design process to the building of a clinical reminder dialog template (CRDT).

The sections that follow suggest actions to follow during each phase of your project. It is up to you to decide where your time and efforts are best spent based on your project goals, timelines, and priorities.

**Overview**

Enter the overview text here (REQUIRED).

Applying the human-centered design process to your CRDT projects makes them safer and easier to use.

The approach works because it asks “What is best for the user?” at every step, from the initial request to delivery of the product.

The overall steps, called phases, are shown in the figure below.

Each phase has its own goals that depend on the where the project is in terms of development. Although phases tend to follow one after the other, there can be some overlap — and even some back and forth between them.

A hallmark of the human-centered design process is the back and forth cycling between Produce and Evaluate phases. The idea is to get feedback on designs before they are carved in stone. This allows course corrections to be made more easily, avoiding resource expensive re-work later.

Learn more about the human-centered design process.

[SECTION = PLAN]

**Narrative**

Enter the **Narrative** for PLAN here (REQUIRED).

The Plan phase identifies the project’s objectives and sets the stage for successful project completion.

Planning should answer:

* What is the problem that the CRDT solves?
* What is the scope of the project?
* What is the timeline?
* What activities and resources will be needed?
* How will the team know that the project was a success?

**Step 1: Identify the Stakeholders**.

The stakeholders will likely include the individual(s) making the work request.

Other stakeholders may include people that will use the template or the generated note.

Sometimes management need to be included to determine if there are impacts to other areas that need to be considered.

**Step 2: Schedule and Conduct a** K**ick-off Meeting**

The kick-off meeting addresses fundamental questions with all the stakeholders sitting at the table.

The kick-off meeting is a good time to:

* + Clarify the work request and document the details.
  + Draft a **problem statement** to clearly define the objectives and make sure they are easy to share
  + 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.

The group setting best supports the most important activity: getting everyone to agree the task, the timing, and the responsibilities.

Finally, it is critical that the decisions made in the kick-off meeting are communicated in writing to everyone involved.

Below are the methods, examples, and tools you can use to complete the Plan phase.

**Checklist**

Enter the **Checklist** items for PLANhere. If there are no details, insert N/A or TBD.

When you are finished with this phase, you will have:

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

**Recommended Methods**

Enter the **Recommended Methods** for PLAN here. If there are no details, insert N/A or TBD.

This method will help you in this phase:

* Drafting a Problem Statement

**Example Outputs**

Enter the **Artifacts** for PLAN here. If there are no details, insert N/A or TBD.

* Sample problem statement (coming soon)
* Sample kick-off meeting agenda (coming soon)

**Tools**

Enter the **Tools** for PLAN here. If there are no details, insert N/A or TBD.

* Kick-off Meeting agenda template (coming soon)
* Intake Form (coming soon)

[SECTION = UNDERSTAND]

**Narrative**

Enter the **Narrative** for UNDERSTAND here (REQUIRED).

**Checklist**

Enter the **Checklist** items for UNDERSTANDhere. If there are no details, insert N/A or TBD.

When you are finished with this step, you will have:

* Insert text.

**Recommended Methods**

Enter the **Recommended Methods** for UNDERSTAND here. If there are no details, insert N/A or TBD.

* Method Name

**Example Outputs**

Enter the **Artifacts** for UNDERSTAND here. If there are no details, insert N/A or TBD.

* Artifact Name
* Artifact Name

**Tools**

Enter the **Tools** for UNDERSTAND here. If there are no details, insert N/A or TBD.

* Tool Name
* Tool Name

[SECTION = SPECIFY]

**Narrative**

Enter the **Narrative** for SPECIFY here (REQUIRED).

**Checklist**

Enter the **Checklist** items for SPECIFYhere. If there are no details, insert N/A or TBD.

When you are finished with this step, you will have:

* Insert text.

**Recommended Methods**

Enter the **Recommended Methods** for SPECIFY here. If there are no details, insert N/A or TBD.

* Method Name

**Example Outputs**

Enter the **Artifacts** for SPECIFY here. If there are no details, insert N/A or TBD.

* Artifact Name
* Artifact Name

**Tools**

Enter the **Tools** for SPECIFY here. If there are no details, insert N/A or TBD.

* Tool Name
* Tool Name

[SECTION = PRODUCE]

**Narrative**

Enter the **Narrative** for PRODUCE here (REQUIRED).

The Produce phase generates the designs for the CRDT. The design will be refined based on feedback collected in the Evaluate phase. The cycle between Produce and Evaluate continues until the design meets the quality objectives identified in the Plan phase.

The design evolves from a high-level concept to a definition of the visual layout and the user interactions with the CRDT. The design can be presented in a variety of formats, including:

* Concept models of the main data and features.
* Storyboards and flow diagrams to describe how the product integrates with the relevant clinical workflow.
* Wireframes that define how interface elements are grouped and ordered on the CRDT.
* A final solution that includes screen elements which conform to CPRS standards.

**Step 1: Consult CPRS Design Patterns**

The design should address how the system outputs information to the user, as well as how the user inputs information into the system.

CPRS includes “design patterns” — strict standards that limit which displays and controls are available in the solution. Design patterns ensure best practices are applied when creating CPRS reminder dialog templates.

**Step 2: Consult Accessibility Guidelines**

To ensure the final design can be used by all types of people on all types of devices, the design should conform to accessibility guidelines.

Not only will such a solution work for people with a wide variety of physical and mental limitations, they can interact with the product using laptops, phones, and tablets.

Below are the methods, examples, and tools you can use to complete the Produce phase.

**Checklist**

Enter the **Checklist** items for PRODUCEhere. If there are no details, insert N/A or TBD.

When you are finished with this step, you will have:

* Created a design to be evaluated.

**Recommended Methods**

Enter the **Recommended Methods** for PRODUCE here. If there are no details, insert N/A or TBD.

This method will help you in this phase:

* Visual Modeling

**Example Outputs**

Enter the **Artifacts** for PRODUCE here. If there are no details, insert N/A or TBD.

* Concept Model for Clinical Reminder Dialog Templates (coming soon)
* Clinical Reminder Dialog Template Wireframe (coming soon)

**Tools**

Enter the **Tools** for PRODUCE here. If there are no details, insert N/A or TBD.

* Summary of Accessibility Guidelines
* International Guidelines for Accessibility

[SECTION = EVALUATE]

**Narrative**

Enter the **Narrative** for EVALUATE here (REQUIRED).

The Evaluate phase collects data to determine how well the current design meets the quality objectives set at the start of the project.

Human-centered design is generally an iterative process. Evaluations are often conducted at several stages in the development of the design, from the early mockups all the way to a fully coded product.

Evaluation supports CRDT development by providing a:

* Check against the original set of requirements.
* Check to see if it meets best practices for CRDTs.
* Check to see if there are any usability concerns.
* Set of recommendations for design improvements.

We recommend that you use a heuristic evaluationto evaluate your CRDT.

With this method, the CRDT is evaluated against a set of rules called heuristics. When elements of the design break one or more of these rules, usability issues will likely be encountered if the product is deployed without being revised.

***Figure:*** A heuristic evaluation is typically delivered in a report with slides or pages containing a screenshot, a description of the issue, the rule that was broken, a severity ranking, and a recommendation.

A screenshot of a social media post

Description automatically generated

Below are the methods, examples, and tools you can use to complete the Evaluate phase.

**Checklist**

Enter the **Checklist** items for EVALUATEhere. If there are no details, insert N/A or TBD.

When you are finished with this step, you will have:

* Verified that the CRDT produces the intended data for reporting.
* Evaluated each screen for usability concerns and issues.
* Developed an action plan to improve the design.
* Produced a report that documents these activities for the stakeholders.

**Recommended Methods**

Enter the **Recommended Methods** for EVALUATE here. If there are no details, insert N/A or TBD.

This method will help you in this phase:

* Heuristic Evaluation

**Example Outputs**

Enter the **Artifacts** for EVALUATE here. If there are no details, insert N/A or TBD.

* Sample report from a Heuristic Evaluation of a Clinical Reminder Dialog Template

**Tools**

Enter the **Tools** for EVALUATE here. If there are no details, insert N/A or TBD.

* TBD

[SECTION = MEASURE]

**Narrative**

Enter the **Narrative** for MEASURE here (REQUIRED).

**Checklist**

Enter the **Checklist** items for MEASURE here. If there are no details, insert N/A or TBD.

When you are finished with this step, you will have:

* Insert text.

**Recommended Methods**

Enter the **Recommended Methods** for MEASURE here. If there are no details, insert N/A or TBD.

* Method Name

**Example Outputs**

Enter the **Artifacts** for MEASURE here. If there are no details, insert N/A or TBD.

* Artifact Name
* Artifact Name

**Tools**

Enter the **Tools** for MEASURE here. If there are no details, insert N/A or TBD.

* Tool Name
* Tool Name

**Excerpt**

Summary text for WordPress.

Learn how to use user-experience methods through a human-centered design process to improve clinical reminder dialog template development.