1:1 w/ David, 5/18 11am

SUMMARY

* May demo
  + Complete entire Playbook wires (not Eric’s stuff)
  + Contrast and create Process Overview and six Phases
  + Fundamental Concepts
  + Methods – page for each method in Playbook listed alphabetically (no filters?)
  + Create list of IA and UX features for testing – research plan
* Training Kits

1. IA tools, Figma: tc stay on PPT for now
2. Second half of May
   1. Scrub the wires
   2. Flesh out Playbook
      1. Address portions of first study feedback
         1. How much will CACs actually read … maybe things more brief with links for details
      2. Phases’ drawers

Teri’s Discovery Airtable, “Method by Process Phase Step - BL Input”

Want the team to rally around all Phases for a CAC

Janey’s “Playbook Build Local CRDT DRAFT May4 jb.ppt” in Early Design Dropbox

Teri drafted Playbook content for first study

Process > Phase pages don’t have the context of a Playbook

* Playbook drafts should inform Process section, and vice-versa
* Playbook “checklists” vs. Process Phase “checklist”
* What about non-Methods like “set up a meeting”
* Try for Process and six Phases for May demo … start with overlaps with Playbook
  + - 1. Top priority right now Produce
         1. Patterns [from Kas, do we need to rewrite/distill?] … lower priority: Accessibility, Standards, more

Case Studies

* + - 1. Other Phases (Understand … also but less vital Specify, Measure)
    1. Related content other than Heuristic Evaluation do it all
       1. Problem Statement
          1. Yes, plus other drafted HFE Methods … how much to refine for things like How To, other features of Playbook Methods
       2. Artifacts
       3. Tools
  1. Analyze Discovery to date for Training Kits and Fundamental Concepts
     1. May demo have some content for landing page for these two site sections
        1. Concepts from Blake, inc. Value Proposition
        2. Concepts from usability.gov and uxbok
     2. General plan for adopting partner content
  2. Analyze Discover to date plus more fodder RE: safety/training email from Ross on Fri PM
     1. One or two Training Kits
        1. Visionary to start … Airtable Discovery “Task\_05\*”
        2. Blake’s syllabus PDF
        3. Possible risk-based
     2. Visionary workflow training
     3. Ross
        1. [safety & risk]

Kurt mentioning measurement … including impact on a VAMC

* + - * 1. Describe how institutionalizing UX practices are central to becoming a high-reliability organization (an important VHA initiative)
        2. Create a video snippet describing ‘safety-enhanced design’
        3. Add methods related to assessing and mitigating risk
        4. Add glossary terms related to patient safety
        5. Maybe there’s some way to address this issue in our methods descriptions??
        6. After meeting with David, va.gov email on CNVAMC HRO Safety Forum
      1. Basics of UX
         1. methods and tools align with training being developed by other VHA organizations – such as the CDS Evaluation training and the AMIA 10x10 Informatics training
         2. If UXG content *compliments* the CDS content – we’re golden. So I’m thinking we use the CDS Eval content to create video snippets of key concepts important to our June Epic.
      2. Produce other CPRS components (order menus, consults) [get input from content team on Tuesday]
      3. fodder for creating Case Studies won’t be a problem. Kas/Blake have a good one that involves patient safety, Kurt led a successful Innovation project, I have a good project involving a national reminder template project.

Try to fit Case Study into IA work for May … but no wires or details

* + - * 1. Besides sample cases, is there something else needed for the IA?
        2. Do we have a sense of what we’re looking for in our case studies? Will users need to see ‘exemplar’ projects that followed a good UX process? Or projects that overcame common challenges?
  1. Airtable PM > Activities tab for tc
     1. Clinical Workflow Analysis
     2. Process Overview & Phase Details (Evaluate [+?] done in March, four or five remain)
  2. Research/Design/Test to organize subsections+
     1. Discovery/Design/Test … Plan/Design/Test … Analysis/Design/Test
        1. How do these map to six Phases
     2. Add this to a new list of research topics … maybe a card sort to inform
  3. Playbook used by team vs. individual
  4. Clean up Dropbox org/labels

1. June
   1. Execute on (1 b) and (1 c)
   2. All other drafted Methods