

## Observer's Roles & Responsibilities

### Before the lab begins

To help the note-taker and your fellow observers focus on the lab session, it is important to keep the observation room quiet once the session has begun.

To that end, please turn off or silence all mobile phones, pagers, and laptop speakers.

[Note: If you need to take a phone call or page, please leave the observation room, and wait until the end of the session to return.]

### During the briefing

Listen for the explanation of the system and watch the participant's reaction.

Make sure the participant understands what we are testing. Learn what type of person the participant is. This will help you better understand the participant's actions.

### During the session

As an observer, you hold the key to the success of the usability session. You are the one to translate the comments of the participant into working solutions for your project.

#### 1. On Post Its, make note of:

- Comments from the participants
- Your inferences based on observation and comments
- Actions that indicate success or that vary from the team's expectations
- The time it takes to complete a task
- Requests for help and the reasons for those requests
- Responses to questions asked by the moderator
- Questions you would like to ask the evaluator during the debriefing about what you **saw** or **heard**.

#### 2. Observe. Do NOT design or redesign

Every evaluator may give a different perspective concerning a usability issue; therefore, do not try to solve problems you see with one evaluator. It is very important to listen to what each evaluator has to say. During the evaluations, the goal is to document the observations, not search for solutions.

We analyze the trends that emerge after the sessions are done.

## HMSA Comparative, Benchmark Usability Labs

### 3. Welcome all issues as useful information

Even if you think the evaluator's problem cannot be helped by a system change, don't discount the problem yet. It may be a small piece of information for a larger problem that can be solved.

Stay objective and unemotional; remember we are designing the system for them.

### 4. Don't discount evaluators

Remember that each evaluator has been carefully screened and selected.

An evaluator's personality or interaction with the system may be different than your own, but that doesn't mean that he/she should be discounted.

### During the debriefing

The debriefing may shed light on issues that are not clearly explained by the evaluator.

Many times the most valuable information from a usability lab comes from the debriefing. It is very easy after the scenarios are complete to "tune out" the debriefing.

DON'T DO IT. The debriefing is not for the evaluator, it is for the observers. This is the opportunity to ask questions about observations that need more explanations.

Knowing exactly what the problem is will help in resolving it.

### Between sessions

The UX research team will provide whiteboard sheets on which you will be sorting and organizing your observations from each session (on Post It notes). Make sure to take the time to discuss what others are putting on the whiteboard sheets and discuss both the common and unique observations.

### Thank you for participating

Your active participation in this research makes it so much richer. We hope you enjoy and have fun.

Kate Chadha & Chike Orjih  
WWT/Asynchrony Labs  
User Experience

HMSA comparative, benchmark labs  
Tasks & objectives

## Overview

Location: Ward Research, 828 Fort Street Mall, #210, Honolulu, HI 96813  
Phone: (808) 522-5123

Moderators: Kate Chadha, Chike Orjih

Project team: Rodney Amian, Brandi Baltz, Albert Cercenia, Marc Chouinard, Darren Matsuda, Lyssa Omori, Joy Vance, Rob Wolfe

## Lab Schedule

Tuesday, April 24, 2018 – Hawaiian residents, under 65 years

Time	Session
9:00 am – 10:00 am	Participant 1 (A)
10:30 am – 11:30 am	Participant 2 (B)
11:30 am – 12:30 pm	Break for lunch
12:30 pm – 1:30 pm	Participant 3 (A)
2:00 pm – 3:00 pm	Participant 4 (B)
3:30 pm – 4:30 pm	Participant 5 (A)
5:00 pm – 6:00 pm	Participant 6 (B)

A = organic path, HMSA.com, then kpinhawaii.com

B = organic path, kpinhawaii.com, then HMSA.com

Wednesday, April 25, 2018 – Hawaiian residents, over 65 years

Time	Session
9:00 am – 10:00 am	Participant 1 (A)
10:30 am – 11:30 am	Participant 2 (B)
11:30 am – 12:30 pm	Break for lunch
12:30 pm – 1:30 pm	Participant 3 (A)
2:00 pm – 3:00 pm	Participant 4 (B)
3:30 pm – 4:30 pm	Participant 5 (A)
5:00 pm – 6:00 pm	Participant 6 (B)

A = organic path, HMSA.com, then kpinhawaii.com

B = organic path, kpinhawaii.com, then HMSA.com

HMSA comparative, benchmark labs  
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**Attending labs:** Rodney Amian, Albert Cercenia, Marc Chouinard, Darren Matsuda, Lyssa Omori, Rob Wolfe

## Research objectives

The [HMSA.com](https://hmsa.com) team (business, design, and development) wants to improve the end-to-end user experience of their public-facing, [HMSA.com](https://hmsa.com), Web site.

Learn how Hawaiian insurance customers (consumers) use [HMSA.com](https://hmsa.com) today (pre-login experience), compared to how they complete similar/same tasks in Kaiser Permanente site for Hawaii ([kpinhawaii.com](https://kpinhawaii.com)).

Specifically, we will measure:

1. How many participants, without any training or assistance, complete the following successfully on each site:
  - Find the right insurance plan for self (or family) & click enrollment/application call-to-action
  - Find relevant, needed health (or wellness) product or service
  - Find answer to a specific question about provider healthcare product or service on site
2. For each of the above, where are the pain points and points-of-delight?
  - Frequency and severity of usability issues/obstacles observed in each task and site?
  - Chart & compare how the participant feels as they complete each task on both sites, and after all tasks are done.

## Session Breakdown

Time	Activity	Explanation
5 min	Briefing & orientation	Participant arrives at the lab and moderator initiates conversation to orient them to the objective of the session.
45 min	Evaluation	Participant completes the defined tasks (see scenarios below).
10 min	Debriefing	Moderator wraps up and asks any observer or note-taker questions.

## Briefing & orientation

Hi, my name is [your name], and I am an independent researcher.

Thank you for agreeing to help me with my research project today. I am working with consumers, like yourself, to help me evaluate how consumers understand and purchase health care related benefits.

I understand that you have previously been directly involved in health care coverage decisions? Briefly tell me about your last experience making a decision on health care coverage.

So, I am going to talk about what we are going to do today. What I am going to do is give you a task and have you show me how to do that task using this computer.

As you complete the task, I will ask you to “think aloud”. In other words, try to talk me through what you are thinking and doing.

If you forget to think aloud. No worries. I am good about letting you work quietly for a little bit and then finding an opportunity to ask you a question about something you are doing to get you talking again. I hope that's okay.

Feel free to ask any clarifying questions if you find something confusing.

Do you have any questions for me before we begin?

Okay. Let's get started.

## Organic path

Type of insurance coverage	Task setup
Self-insured	<p>Think back to when you last looked for and purchased your health insurance plan. Show me where you started and walk me through everything you did.</p> <p>Remember to think aloud as you do so.</p>
Insured through employer (or spouse/parent's employer)	<p>I understand you have health insurance with [employer's name].</p> <p>When did you sign up for that plan?</p> <p>Imagine you leave your job (or your spouse/parent leaves their job).</p> <p>You now need to find and buy insurance for yourself (your family).</p> <p>Show me what you will do to find and purchase health insurance.</p> <p>Remember to think aloud as you do so.</p>
Uninsured	<p>When you were recruited, you answered that you do not currently have health insurance, but plan to purchase it.</p> <p>Show me what you will do to find and purchase that plan.</p> <p>Remember to think aloud as you do so.</p>

## Objective

Observe how Hawaiian residents/consumers find, study, and select a health insurance plan for themselves (and family, if applicable).

HMSA comparative, benchmark labs  
Tasks & objectives

## HMSA: path-to-application

For the next task, I would like to get your feedback on a specific Web site.

What do you know about this company [Internet browser opened to [hmsa.com](https://hmsa.com)]?

Show me how to find and purchase a health insurance plan for you (your family) using this site, and verbally walk me through what you are thinking and doing.

### Objective

Observe how Hawaiian residents/consumers find, study, and select a health insurance plan for themselves (and family, if applicable) on HMSA.com.

## HMSA: Locate gym or fitness center discounts for your policy (day 1, under 65 years)

Next task. Tell me: do you currently belong to a gym or fitness center?

Answer	Task setup
<b>Yes, has gym membership</b>	<p>You want to know what fitness benefits or services your HMSA health insurance plan offers.</p> <p>Show me how you will figure that out.</p> <p>Remember to think aloud as you work.</p>
<b>No gym membership</b>	<p>You want to join a gym or fitness center. Show me what fitness benefits or services your HMSA health insurance plan offers.</p> <p>Remember to think aloud as you work.</p>

### Objective

How easily and quickly a participant finds information about gym membership for their HMSA plan has a discount.



## HMSA: Get number for new primary care doctor (day 2, 65+ years)

Let's move on.

Quick question: How many doctors did you see in the past year? How long have you been seeing each one?

Answer	Task setup
<b>HMSA member</b>	<p>Your current primary physician is retiring. You want to figure out who else you can go to instead.</p> <p>Tell me how you will accomplish this.</p> <p>Show me how to complete that task using this site (hmsa.com).</p> <p>Walk me through what you are doing.</p>
<b>Not HMSA member yet</b>	<p>You change to HMSA insurance. You need to ensure you can see the same doctors. Tell me how you will do that.</p> <p>Show me how to complete that task using this site (hmsa.com).</p> <p>Walk me through what you are doing.</p>

### Objective

How easily and quickly a participant finds a provider phone number.

HMSA comparative, benchmark labs  
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## HMSA: locate the form to designate authorized representative

For the next task, I need to find out a bit more about how you manage your healthcare.

Who is someone who will need to contact HMSA to make requests on your behalf regarding your eligibility, billing, payment status, claims, and HMSA payment decisions?

Find out how to grant [person they mention above] access to your HMSA account, so they can make these kinds of requests. Tell me when you are done.

### Objective

How easily and quickly a participant finds information and forms to appoint, or revoke, an "authorized representative" on [hmsa.com](https://hmsa.com).

## HMSA: Finding a contact (current vs. new design)

[As time permits.]

Here is the last task with this Web site:

Answer	Task setup
<b>Has HMSA insurance currently</b>	You want to call someone at HMSA who can answer a question you have about your insurance coverage.  Show me how to do that on their site.
<b>Not a HMSA member yet</b>	Let's say you purchase that HMSA insurance plan you found in the second task. Yes or no: Do you remember the name of that insurance plan you looked at?  You now want to call someone at HMSA who can answer a question you have about your insurance coverage.  Show me how to do that on their site.

We are in the process of redesigning that task.

I'd love your feedback on an early design idea we have. Okay?

What do you think of the new design so far?

Tell me **1 thing that will make it better** for you.

### Objective

How easily and quickly a participant finds contact information when they have a question about their insurance plan (current vs. new concept).

HMSA comparative, benchmark labs  
Tasks & objectives

## Kaiser Permanente: path-to-application

Now, I would like to get your feedback on a different site.

What do you know about this company [Internet browser opened to [kpinhawaii.com](http://kpinhawaii.com)]?

Show me how to find and purchase a health insurance plan for you (your family) using this site, and verbally walk me through what you are thinking and doing.

### Objective

Observe how Hawaii residents/consumers find, study, and select a health insurance plan for themselves (and family, if applicable) on [kpinhawaii.com](http://kpinhawaii.com).

## Kaiser Permanente: Locate gym or fitness center discounts for your policy (day 1, under 65 years)

Almost done. Tell me: do you currently belong to a gym or fitness center?

Answer	Task setup
<b>Yes, has gym membership</b>	<p>You want to know what fitness benefits or services your Kaiser health insurance plan offers.</p> <p>Show me how you will figure that out. Remember to think aloud as you work.</p>
<b>No gym membership</b>	<p>You want to join a gym or fitness center. Show me what fitness benefits or services your Kaiser health insurance plan offers.</p> <p>Remember to think aloud as you work.</p>

### Objective

How easily and quickly a participant finds information about gym membership for their Kaiser plan has a discount.

## Kaiser Permanente: Get number for new primary care doctor (day 2, 65+ years)

Almost done.

Quick question: How many doctors did you see in the past year? How long have you been seeing each one?

Answer	Task setup
<b>Current Kaiser member</b>	<p>Your current primary physician is retiring. You want to figure out who else you can go to instead. Tell me how you will accomplish this."</p> <p>Show me how to complete that task using this site (<a href="https://www.kpinhawaii.com">kpinhawaii.com</a>). Walk me through what you are doing.</p>
<b>Not a Kaiser member</b>	<p>You change to Kaiser Permanente insurance. You need to ensure you can see the same doctors. Tell me how you will do that.</p> <p>Show me how to complete that task using this site (<a href="https://www.kpinhawaii.com">kpinhawaii.com</a>). Walk me through what you are doing.</p>

### Objective

How easily and quickly a participant finds a provider on [kpinhawaii.com](https://www.kpinhawaii.com).

HMSA comparative, benchmark labs  
Tasks & objectives

## Kaiser Permanente: locate the form to designate authorized representative

For the last task, I need to find out a bit more about how you manage your healthcare.

Who is someone who will need to contact Kaiser to make requests on your behalf regarding your eligibility, billing, payment status, claims, and Kaiser payment decisions?

Find out how to grant [person they mention above] access to your Kaiser account, so they can make these kinds of requests. Tell me when you are done.

### Objective

How easily and quickly a participant finds information and forms to appoint, or revoke, an "authorized representative" on [healthy.kaiserpermanente.org/hawaii](https://healthy.kaiserpermanente.org/hawaii).

HMSA comparative, benchmark labs  
Tasks & objectives

## Debriefing

That's it!

As a wrap-up, I'd like to talk about a few things with you:

In this session, you completed everyday health-related tasks in two Web sites: [HMSA.com](https://www.hmsa.com) and [kpinhawaii.com](https://www.kpinhawaii.com).

I am going to ask you a couple of questions about the overall experience.

[Note: this may be an online questionnaire to save time.]

Which site had the best experience for each of the below, and why?

- Finding the best health insurance plan for you (and your family, if applicable)
- Finding a specific form you may need?
- Finding a new primary physician?

Overall, which site works best for you? Why?

That concludes your evaluation.

My colleague [notetaker's name] will take you to the reception to sign you out.



## Usability session: notetaking worksheet

Participant:

Page:

Task: Organic path

Observe & take note (do **NOT** ask)

Where does person start the journey?	
What Internet browser app do they use (e.g. Google Chrome, Safari, etc.)	
If they use a search engine, which one do they use (e.g.; Google, Bing, etc.)	
If they use a search engine (e.g.; Google), what search terms do they use?	
If they do an Internet search, what search result do they click first?	
What information do they seek first?	
How far do they get to application/enrollment?	
If they apply/enroll, how do they expect to complete that task (e.g.; online, paper form/PDF, etc.)?	

Measures

Steps in journey	
Participant emotional state through journey	
Task outcome: clicks enroll/apply and gets form, abandon, etc.	
SEQ:	
Confidence	

Turn over for free-form notes ->

## Usability session: notetaking worksheet

Participant:

Page:

Task: H – path2app

Attempt	Outcome (S, A, F)	#Assists
1		
2		
3		

### Measures

Frist click	
Steps in journey	
Participant emotional state through journey	
Task outcome: clicks enroll/apply and gets form, abandon, etc.	
SEQ:	
Confidence	

Turn over for free-form notes ->

## Usability session: notetaking worksheet

Participant:

Page:

Task: K – path2app

Attempt	Outcome (S, A, F)	#Assists
1		
2		
3		

### Measures

Frist click	
Steps in journey	
Participant emotional state through journey	
Task outcome: clicks enroll/apply and gets form, abandon, etc.	
SEQ:	
Confidence	

Turn over for free-form notes ->

## Usability session: notetaking worksheet

Participant:

Page:

Task: H – Find gym or fitness benefits for my plan

Attempt	Outcome (S, A, F)	#Assists
1		
2		
3		

### Measures

Frist click	
Steps in journey	
Participant emotional state through journey	
Task outcome: clicks enroll/apply and gets form, abandon, etc.	
SEQ:	
Confidence	

Turn over for free-form notes ->

## Usability session: notetaking worksheet

Participant:

Page:

Task: K – Find gym or fitness benefits for my plan

Attempt	Outcome (S, A, F)	#Assists
1		
2		
3		

### Measures

Frist click	
Steps in journey	
Participant emotional state through journey	
Task outcome: clicks enroll/apply and gets form, abandon, etc.	
SEQ:	
Confidence	

Turn over for free-form notes ->

## Usability session: notetaking worksheet

Participant:

Page:

Task: H – Find out how to grant s/one access to your HMSA account

Attempt	Outcome (S, A, F)	#Assists
1		
2		
3		

### Measures

Frist click	
Steps in journey	
Participant emotional state through journey	
Task outcome: clicks enroll/apply and gets form, abandon, etc.	
SEQ:	
Confidence	

Turn over for free-form notes ->

## Usability session: notetaking worksheet

Participant:

Page:

Task: K – Find out how to grant s/one access to your HMSA account

Attempt	Outcome (S, A, F)	#Assists
1		
2		
3		

### Measures

Frist click	
Steps in journey	
Participant emotional state through journey	
Task outcome: clicks enroll/apply and gets form, abandon, etc.	
SEQ:	
Confidence	

Turn over for free-form notes ->

## Usability session: notetaking worksheet

Participant:

Page:

Task: H – finding number for new primary doctor/provider (CURRENT)

Attempt	Outcome (S, A, F)	#Assists
1		
2		
3		

### Measures

Frist click	
Steps in journey	
Participant emotional state through journey	
Task outcome: clicks enroll/apply and gets form, abandon, etc.	
SEQ:	
Confidence	

Turn over for free-form notes ->



## Usability session: notetaking worksheet

Participant:

Page:

Task: H – finding number for new primary doctor/provider (PROTOTYPE)

Measures

Frist click	
Steps in journey	
Participant emotional state through journey	
Task outcome: clicks enroll/apply and gets form, abandon, etc.	
SEQ:	
Confidence	

Compare current and prototype

Which is better for you?	
Tell me 1 thing to make that even better:	

Turn over for free-form notes ->

## Usability session: notetaking worksheet

Participant:

Page:

### Debrief-wrap questions

Observer	
Question	

Observer	
Question	
Observer	
Question	

Final thoughts:

Turn over for free-form notes ->