

	<Insert protective marking if applicable> <b>GP2GP Supplementary Specification: User Experience</b>			
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## GP2GP Supplementary Specification User Experience

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**Distribution:**

GPSoc programme and GP software suppliers

**Document Status:**

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**Related Documents:**

These documents will provide additional information.

Ref no	Doc Reference Number	Title	Version
1	NPFIT-SHR-QMS-PRP-0015	Glossary of Terms Consolidated.doc	<enter latest>

## Glossary of Terms:

List any new terms created in this document. Mail the NPO Quality Manager to have these included in the master glossary above [1].

Term	Acronym	Definition
CX	Customer Experience	Commonly used when the human is considered in the wider context of interaction or 'end to end' i.e. not just when they use the product or service but also their emotions and attitudes prior to engagement, during and after.
UX	User Experience	Commonly used when considering the Human only when and as they interact with the product or service
Usability	Effectiveness , Efficiency and Satisfaction	Used when talking about the users ability to achieve their own goals and the goals of the business/stakeholders. It is concerned with the measurement of;  Effectiveness = The ability provided by the product or system to allow the user to achieve their desired goal  Efficiency = The speed ease and accuracy with which the system allows the user to complete their desired goal  Satisfaction = The 'feeling' the system or product leaves the user with after they have completed their desired task/s
ID	Interaction Design	The formulation of a 'flow' and a style of human system/product interaction through a system which will allow the user to achieve their goals in a usable way, whilst creating a positive experience
IA	Information Architecture	The categorisation and ordering of data and information on a website or within a product. Commonly applied to navigation structures, menu systems and information grouping, often a first step in interaction design
UCD	User Centred Design	The catch all term used to describe any activity in creating a product or service that places the user at the centre of the decision making process, the trick is actually talking to users at every step, including concept formation. There are a myriad of techniques used to elicit the correct feedback for every stage of the product/service life cycle
Graphic Design	Colours, layout	The 'house style' and branding application to the Wireframes/Copy/Product. We don't currently have a graphic designer on the CFH CX team

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# **1 About this Document**

## **1.1 Purpose**

The purpose of this document is to define the process for developing and improving the user experience for General Practice staff involved in the GP2GP transfer of patients' Electronic Health Record (EHR).

## **1.2 Audience**

This document has been written for project managers, user experience and software developers.

## **2 Overview of the GP2GP Solution**

This section provides a summary view of the solution to allow readers a familiarisation with the key aspects which will aid in the understanding of the document contents.

The GP2GP Baseline 2.2 satisfies the need for the transfer of a patient's Electronic Health Record between establishments that provide Primary Care services. In its current form these establishments are restricted to NHS General Practice Surgeries within England although the limitation is funding driven and technically limited to organisations with SDS entries and with patients listed on PDS.

The solution allows a GP practice registering a new permanent patient to send a request to the patient's previous GP practice system to ask for the electronic transfer of the EHR (Electronic Health Record).

This results in a GP having access to a new patient's records in a much shorter timeframe and can lead to an improved level of patient care.

### **3 Summary of User Experience requirements**

A number of issues have been identified in the live estate (baseline 1.1a). Many of these have led to enhancements in the 2.2 baseline including this supplementary specification. Examples include:

- Users unable to identify how many GP2GP transfers have taken place
- Users unable to determine which GP2GP transfers have succeeded
- On-screen messages misleading users that something bad or unexpected has happened, which puts the user off, when in fact the process has terminated at an expected point because GP2GP transfer is not possible.

These are just a few examples reported by users and witnessed by the GP2GP deployment team. This User Experience specification sets out a process for collaborative working between the supplier and the Authority starting at the scoping stage of each release containing GP2GP.

#### **3.1 Scope**

The Authority is not intending to create a uniform General Practice system through this process, simply to provide the benefit and experience of User Experience professionals through User Centred Design processes. The scope of this work will cover any area of functionality that affects the GP2GP transfer process including:

- Registering a permanent patient for primary care treatment
- The EHR transfer process
- Finding out what GP2GP transfers were triggered, what happened to them and being able to find out what to do about it.
- Integration or rejection of the received EHR

The aim of this piece of work is to improve the transfer rate (usage) and ultimately the availability of GP2GP EHR transfers when patients register at a new practice.

The following sections set out the different types of activities that will be carried out:

- 1) Live estate usability issues identified from any previous releases
- 2) User Centred Design (UCD) activities for each new release

## 4 Live Estate Usability Issues

General Practice users and the GP2GP deployment team have identified problems with the way systems in the live estate communicate error messages to their users.

In order to verify that the problem is indeed with the error messages the Authority's user experience team will undertake the following activities.

### 4.1 Expert Review

- Screen shots of all the steps involved in the process in question will be reviewed.
- The supplier will provide all appropriate material (e.g. screen shots, error lists etc.)

### 4.2 Contextual Observation

In order to verify that users are indeed struggling, and that the problem is not a more latent system/process issue, users should be observed using the supplier's system in their natural environment.

- 1 observer in the work place
- 1/3 – 1/2 of a day per practice
- Mix of Practice sizes according to GP2GP Utilisation (and practicality of visiting)

### 4.3 Reporting and Supplier Changes

The Authority will report the findings of the User Experience team to the supplier. The supplier will provide the Authority with the planned activities, changes to the system, or justification of no change for each recommendation made within 4 weeks. The changes to the system will be implemented in the next release unless the Authority agrees otherwise.

### 4.4 Timescales

The activities involved will take the following and **depend on the active support of the supplier and the practices utilising the supplier's software.**

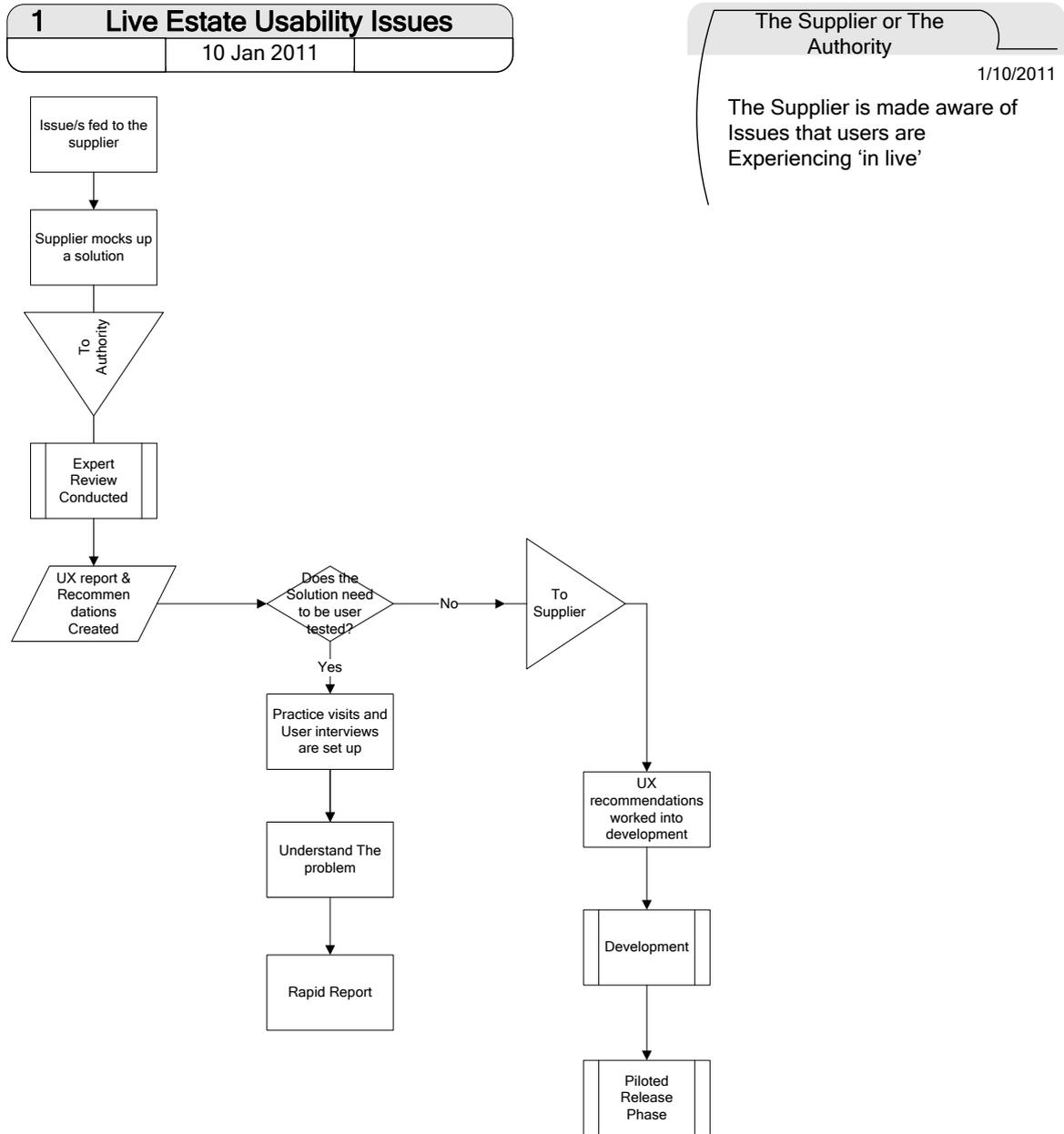
Activity	Timescales (Best Case)	Responsible Party
Arranging General Practice visits	5 (elapsed days)	The Authority
Expert Review	4 (person days)	The Authority
Contextual Observation	5 (person days)	The Supplier

Activity	Timescales (Best Case)	Responsible Party
Reporting	5 (person days)	The Authority The Supplier
Plan of action	28 (elapsed days)	The supplier
Release of changes	Next release	The supplier

#### 4.5 Live Estate Usability Issue Requirements

Req ID	Requirement Text	Priority
UX01	<p>The supplier <b>shall</b> provide a list of all the current error messages that the system might present to a user in relation to patient registration or GP2GP transfers along with a description of how and why each message occurs and what remedial action the user can take.</p> <p>The supplier <b>shall</b> provide this information at the scoping stage of a release or on request by the Authority.</p>	MUST
UX02	<p>The supplier <b>shall</b> provide the Authority with the planned activities, proposed changes to the system, or justification of no change for each recommendation made by the Authority within 4 weeks of receiving it.</p>	MUST
UX03	<p>The supplier <b>shall</b> implement the agreed changes to the system in the next release unless the Authority agrees otherwise.</p>	MUST

## 4.6 Process Flow



## **5 User Experience Process for Change**

To ensure that future GP2GP changes/releases have a positive affect on the user group, it is essential that the supplier follows a user centred design process (UCD).

In the case of the GP2GP system it is recommended that the following activities be conducted:

- Development of user requirements & UX Metrics, (which may include personas)
- Understanding of the context of use
- Iterative prototype / test cycle BEFORE development
- Phased piloted release

### **5.1 Expert Review**

The Authority's User Experience team will be engaged by the supplier at the scoping stage of the release. This team will collaborate with the supplier, General Practices, technical architects and other key stakeholders including users, to provide recommendations and review of the supplier's prototypes. Based on this initial review it will be decided if any further activity is needed.

### **5.2 Development of User Requirements & UX Metrics**

GP2GP has a functional requirements list but the supplier will need to engage as many actual end users as possible, in a structured way, to develop the implementation of these requirements in their particular General Practice system. This will also be used to illicit a system usability score and other important customer experience measurements.

### **5.3 Understanding of the Context of Use**

The context of use is not something that can be extrapolated from user 'requirements' the only way to understand it, is to silently observe and interview end users after task completion. A set of use cases will then be developed to account for environmental factors and job role issues etc.

### **5.4 Iterative Prototype/Test Cycle BEFORE Development**

Once a solid understanding of the audience, their needs and their environment is achieved, it will provide insight into how the product can be improved. A prototype incorporating the improvements should be produced BEFORE expensive development begins. This prototype should be tested 'one on one' with actual end users and iterated based on their feedback.

### **5.5 Phased Piloted Release**

Once the testing phase has finished it should have ironed out any experience issues and usability problems. At this point the UCD cycle plugs into development; the product is produced and gradually transitioned into live via a series of controlled

pilots during which we can validate UX metrics. These should be aligned to the First of Type (FoT) process currently undertaken. It is important that suppliers still gather feedback to improve the product in subsequent maintenance releases.

## 5.6 Timescales

The activities involved will take the following indicative timescales.

Activity	Timescales (Best Case)	Responsible Party
Expert Review	3 (Person Days)	The Authority The Supplier
Arranging General Practice visits User recruitment	7 (elapsed days – once)	The Authority
Develop user requirements & UX Metrics Understand context of use	10 (person days - once)	The Supplier The Authority
Reporting – innovations	7 (person days)	The Authority The Supplier
Prototyping round 1	5 (person days)	The Supplier
User testing round 1	3 (person days)	The Supplier
Prototyping round 2	3 (person days)	The Supplier
User testing round 2	3 (person days)	The Supplier
Prototyping round 3	2 (person days)	The Supplier
User testing round 3	3 (person days)	The Supplier
Reporting	25 (elapsed days) from prototyping round 1 onwards	The Authority The Supplier

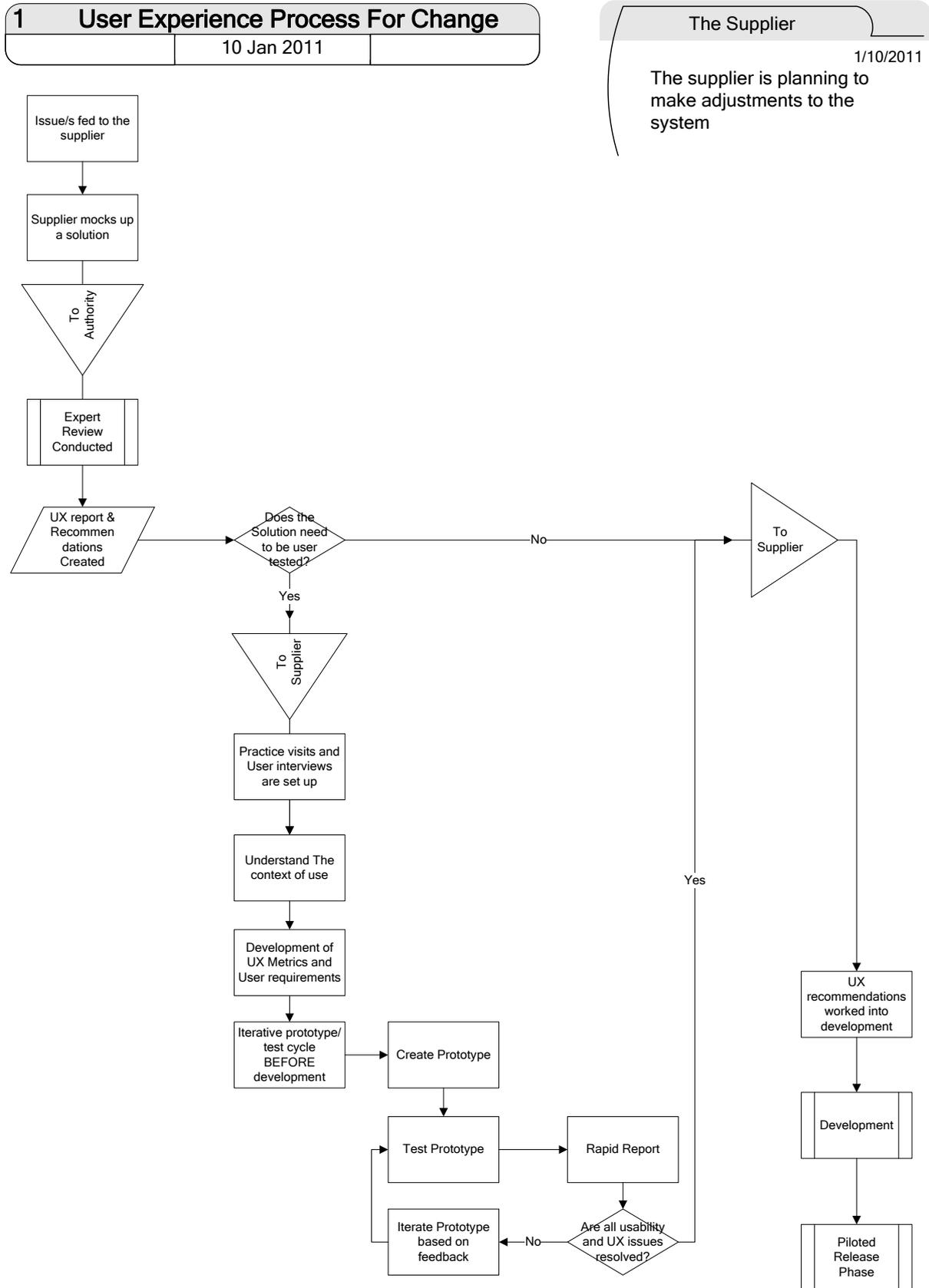
## 5.7 User Experience Process (each release) Requirements

Req ID	Requirement Text	Priority
UX11	The Supplier <b>shall</b> provide the authority with a prototype that can be understood by non-technical people so that the Expert Review can take place.	MUST

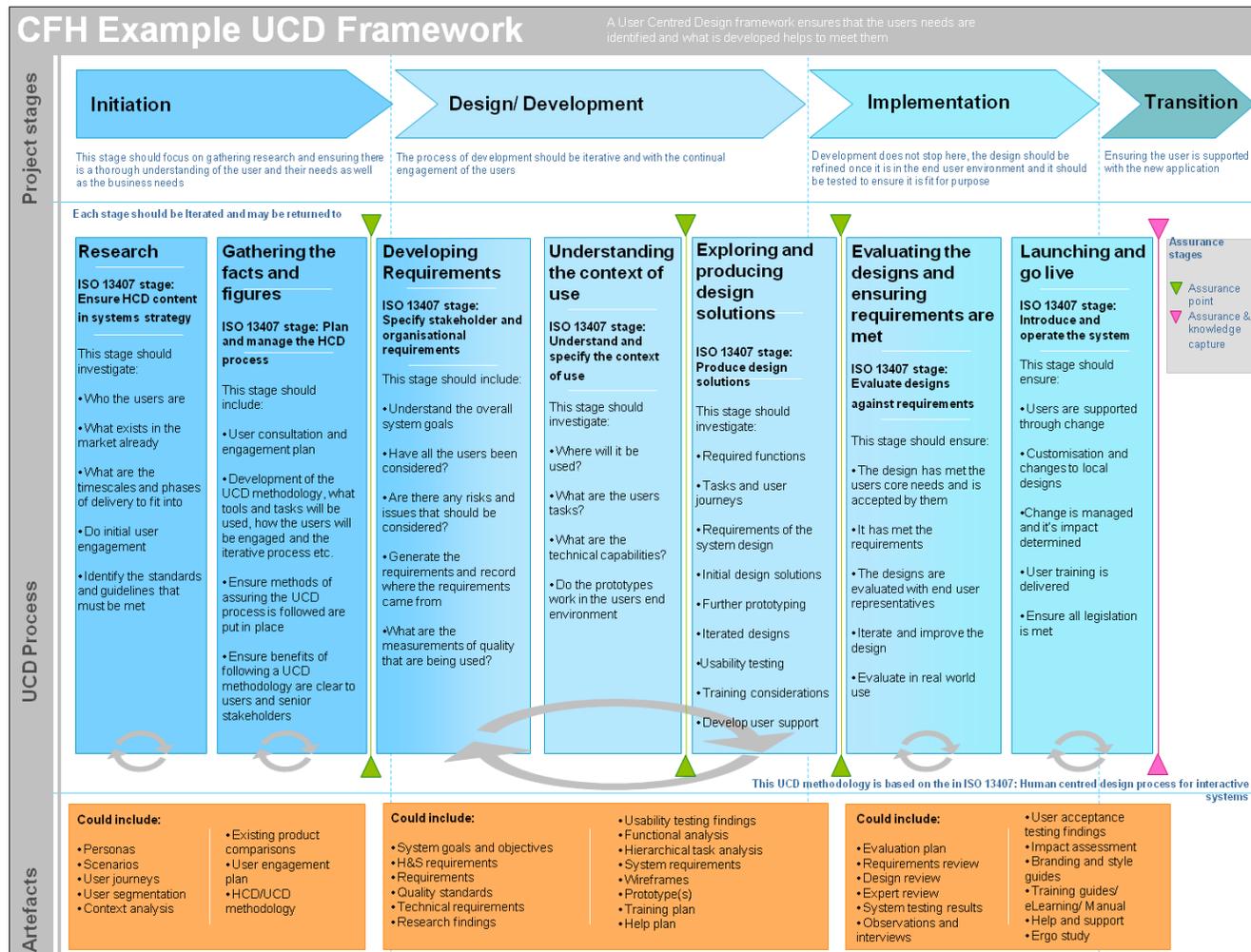
Req ID	Requirement Text	Priority
UX12	The supplier <b>shall</b> prototype (mock up) any changes to the system that effect the users workflow or the GUI prior to development.	MUST
UX13	The Authority <b>shall</b> arrange for a UX professional to visit a representative sample of Practice's to assess the current usability, experience and context of use.	MUST
UX14	The Authority <b>shall</b> arrange as many one-on-one interviews with practice staff as practicable to fully explore user requirements.	MUST
UX15	The Authority <b>shall</b> endeavour to understand the GP2GP Context Of Use through all the activities listed, primarily the Contextual observations. This knowledge will be distilled into various documents and reports to help the supplier translate it into the system development.	MUST
UX16	The Authority <b>should</b> develop a set of User Requirements & Metrics based on user requirements and expert knowledge, that the system can be measured upon at the prototype, test and live pilot test phases.	SHOULD
UX17	The Supplier <b>shall</b> organise and conduct at least one round of user testing on the GP2GP system, if the expert review deems it necessary.	MUST
UX18	The supplier <b>shall</b> iterate the Prototype based on the feedback from the first round of user testing	MUST
UX19	The supplier <b>should</b> conduct a second round of user testing once changes have been made to the prototype	SHOULD

Req ID	Requirement Text	Priority
UX20	The supplier <b>should</b> re-iterate the Prototype based on findings from the second round of user testing	SHOULD
UX21	The Supplier <b>may</b> conduct a 3 <sup>rd</sup> round of user testing	MAY
UX22	The Supplier <b>may</b> re-iterate the Prototype based on findings from the third round of user testing	MAY
UX23	The Supplier and the Authority <b>shall</b> report their findings to each other to support the User Experience process.	MUST

### 5.8 Process Flow



## 6 Appendix A – CFH Example UCD Framework



# 7 Appendix B – The Benefits of a UCD Framework

