

Referral's Platform Test User Group 1 Feedback Synthesis

This is a preliminary report on feedback from test users of the BHA's in-progress Referrals Platform from July 2023

Key Insights

We've identified key themes from the feedback provided by test users across areas including user interface design, navigation, search functionality, terminology clarity, and user testing strategies. As user testing is ongoing, we anticipate additional refinements to both the platform and our findings.

User Interface Design & Navigation

User Feedback

Users generally found the login process straightforward but suggested room for improvements. Some users misinterpreted the login link as spam, suggesting that system invites should come from a recognizable address like a BHA domain to inspire trust.

Additionally, users noted that the platform layout, such as the positioning of the 'Submit' button and 'Create Unit' checkbox, could be more intuitive.

When creating and updating unit information, users suggested that auto-populating the information for new units with the facility values by default would save time, especially for multi-select questions where it is faster to deselect multiple options than to select them. Additionally, users noted that the form had a lot of information and could be overwhelming. Users suggested that the sections of the form default to collapsed so that users can select which sections to view, in addition to exploring more intuitive page design and refined information architecture.

Users also commented on the uniformity of the platform's color scheme, suggesting more variety to distinguish different sections, as well as incorporating BHA branding elements for an improved sense of familiarity and credibility.

The ability to select multiple items from dropdowns wasn't intuitive for several users, which could affect the accuracy and comprehensiveness of the data entered. The users expressed the need for more obvious prompts or instructions indicating that multiple selections are possible.

Recommended Improvements

- **Use a recognizable BHA domain** for system invites to enhance the login process.
- **Add tooltips** or short explanatory text next to features or buttons to provide brief descriptions of their purpose and use where necessary.
- **Diversify the color scheme** and **incorporate BHA branding elements** to provide familiarity and credibility.
- **Use highlighting or UI design elements** to show where multiple selections are possible, improving user understanding and interaction with these elements.
- **Auto-populate information** for new units with default facility values to save the users time when adding new units.
- **Explore page design and information architecture**, in the View/Update Facility Information and Update Bed Availability forms so that users don't have to scroll and hunt for information.
- Reposition the 'Submit' and 'Create New Unit' checkboxes
- Provide more detailed **instructions, FAQs, or a help section** to provide additional guidance on platform usage and functionalities.

Search Functionality

User Feedback

Users expressed an interest in refining the platform's search functionality. They appreciated the existing search options but were keen on having more detailed parameters. Additional filters, such as a wider range of client populations, more descriptive search radius options, and the inclusion of specialized facility types, were among the improvements users suggested. They also expressed a desire for the search functionality to dynamically update as parameters change, eliminating the need for manual reloading.

Recommended Improvements

- **Improve Navigational Efficiency:** When faced with no search results, users were able to manually expand their search radius by removing parameters. However, they expressed a desire for the search functionality to dynamically update as parameters are altered. In other words, instead of manually reloading or reinitiating a search after making changes, they suggested that the system automatically refresh the search results based on the revised parameters. This live adjustment to the displayed results would provide a more interactive experience, reducing the number of steps taken and time spent when seeking matching facilities.

We recommend soliciting additional specific feedback from users around the following:

- **Expand Search Parameters:** Users felt that additional filters, such as a wider range of client populations and more descriptive search radius options, would allow for more specific and targeted searches. For example, users were keen to see the inclusion of facility types like 'Qualified Residential Treatment Program (QRTP)' and 'Psychiatric Residential Treatment Program (PRTTP)'. The addition of these and other specialized facility types would enhance the comprehensiveness of the search function and further cater to a wide range of client needs.
- **Enrich Result Details:** While users found the basic information provided in search results helpful, they were excited about the potential for more detailed facility descriptions. Incorporating information such as language services, licensing/critical incident issues, and more in-depth facility features could enrich the search results and facilitate a more informed decision-making process.

Terminology and Vocabulary Clarity

User Feedback

Across the user groups, users noted confusion regarding certain terms used within the platform. The interpretation of these terms varied between users, potentially leading to miscommunication and incorrect usage of the platform.

Recommended Improvements

- Hiding 'Sync' button to improve clarity of home screen

Additional user research required:

- **Clarify Technical Terms:** Users misunderstood some terms in the system, such as 'Referrals Platform' and 'Bed Type'. To address this, we recommend the following actions:
 - Conducting interviews with providers to identify intuitive nomenclature for the referral system that aligns with their industry understanding and practices.
 - Upgrading tooltips where possible to offer immediate explanations when users hover over these program-specific terms.
 - Including extended descriptions in a help or FAQ section to provide additional guidance and help users understand and use these terms correctly.
- **Refine Gender and Age-Related Terms:** The 'Women' term in the gender information section confused users, leading to potential misinterpretation, such as placing adolescents in adult women's programs. To mitigate this, we propose the following:
 - Employ more explicit terminology to clearly differentiate between adult and adolescent services.
 - Insert additional help text or tooltips where possible to provide context and clarify meaning.

- **Improve Residential Service Labeling:** Feedback from users indicated concerns about the broad and generic labeling of residential services. This vague categorization could potentially lead to misselections of facilities. To enhance accuracy and user comprehension, we propose:
 - Conducting interviews with providers to determine more precise service labels that genuinely reflect the variety of services offered. This step will help ensure the terminology aligns with the sector's common understanding and expectations.
 - Wherever feasible, integrating comprehensive descriptions for each service. These detailed explanations will assist users in making more informed decisions when selecting the most suitable options.

User Testing Strategies

User Feedback

The sessions underscored the importance of thorough and targeted testing, leading our teams to suggest revisions to the existing testing methodologies. We see a need for specific test scenarios and expanded test data. The following recommended enhancements are informed by our aim to more effectively simulate real-world situations and gain deeper insights into the platform's functionality and usability.

Recommended Improvements

- **Introduce more specific test scenarios** to more accurately replicate the users' experience and validate the platform's functionality in real-world use cases. The more we align our tests with actual user scenarios, the more reliable and intuitive our platform becomes.
- **Augment existing test data** to enable broader user search simulations. We recommend collecting and importing unit data prior to onboarding the second group of test users so realistic unit data will be available for their use in the test environment. The feedback from testing sessions showed the necessity of this enhancement for a couple of reasons:
 - Limited data often leads to searches returning zero results, which restricts users' ability to give comprehensive feedback on filtering capabilities.
 - A more expansive dataset exposes potential bugs, design flaws, or inefficiencies that aren't apparent with limited data. It also improves the likelihood of detecting crucial edge cases and anomalies.
- **Segment user testing groups based on roles**, acknowledging that different user roles come with unique challenges and requirements. Implementing this recommendation would result in the following benefits:
 - It helps highlight role-specific issues and needs, enabling a more tailored and efficient system.
 - By understanding the specific needs, habits, and pain points of different roles, we can optimize the design and functionality of the platform to cater to each user group more effectively.

A few types of users that participants suggested as areas for focus were people who work with clients who are Spanish-speaking, LGBTQIA+, or unhoused as well as the 211 resource line.