

# Medidata User Testing

Results + Insights

# Agenda

**Methodology**

**Test Results**

**PD + Non PD Site Issue** - Issue Management

**Non-PD Study Issue** - Issue Management

**Study Management**

**Monitoring Visit** - Site Management

**Recommendations**

# Methodology

## How we conducted the tests

Task-based Usability Tests

UserZoom (Advanced UX Research)

Screen Recording

Quantitative Metrics

Difficulty of Task

Time on Task

Successful/Unsuccessful

Number of Clicks

Qx Score Questionnaire

## Test areas

**PD Site Issue** - Issue Management

**Non-PD Site Issue** - Issue Management

**Non-PD Study Issue** - Issue Management

**Monitoring Visit** - Site Management

**Study Management**

## How many testers per test

3-5 per test x 5 tests

## Roles of testers

CTM    CTA

LTM    SM

## Why these tests

They provide the greatest range of usability data to assess the current experience of the application for all 3 roles (CTM, LTM, SM).

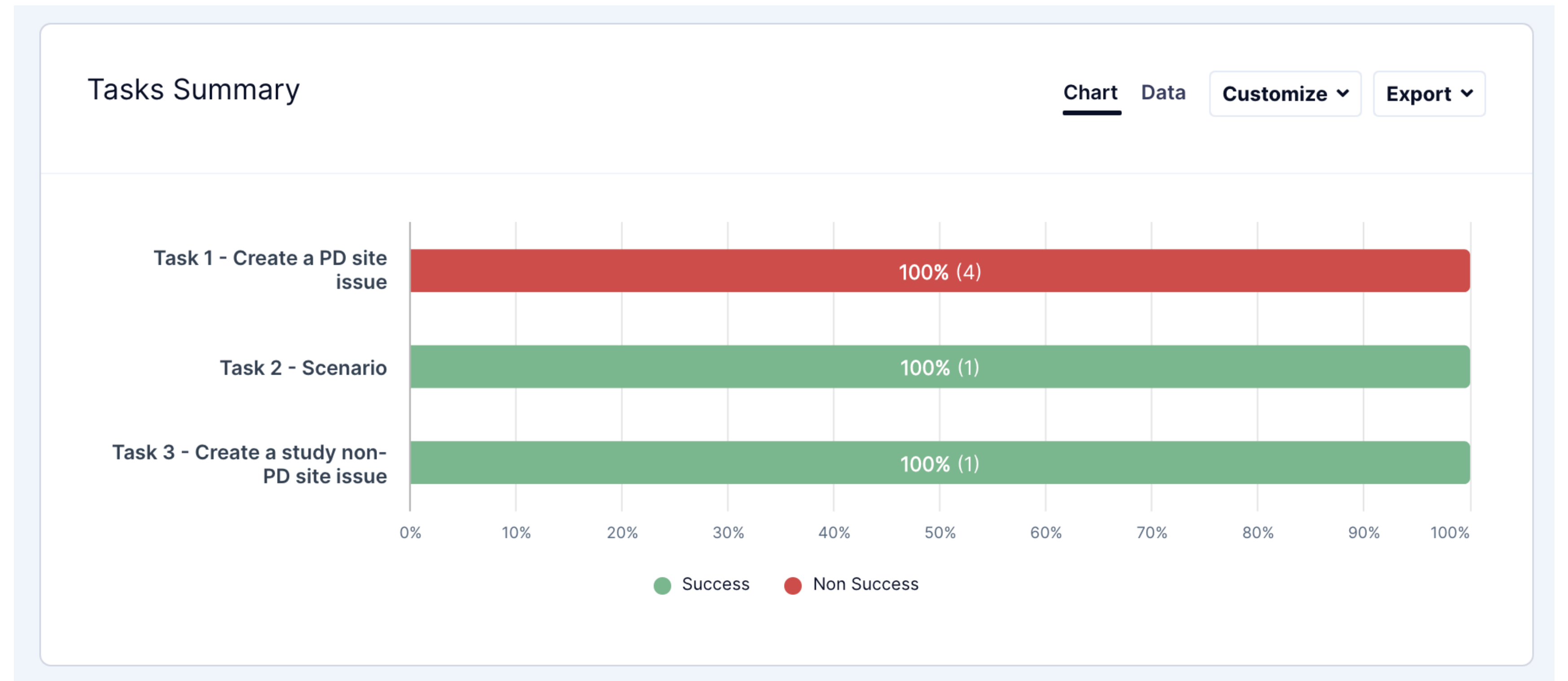
# PD + Non-PD Site Issue

**Issue Management**

# Issue Management - PD + Non-PD Site Issue

## Task Summary

Testers: **CTM, LTM, SM**



# Issue Management - PD + Non-PD Site Issue

## Task 1 - Create a PD Site Issue

### Scenario

Subject XXXX1 took a prohibited herbal supplement, Lyon's Mane 100 mg, on Day 3 of the screening period.

### Create a PD site issue

1. Open study record 42847922MDD2002
2. Click on "USA" as country.
3. Click on "Site Number 1001"



# Issue Management - PD + Non-PD Site Issue

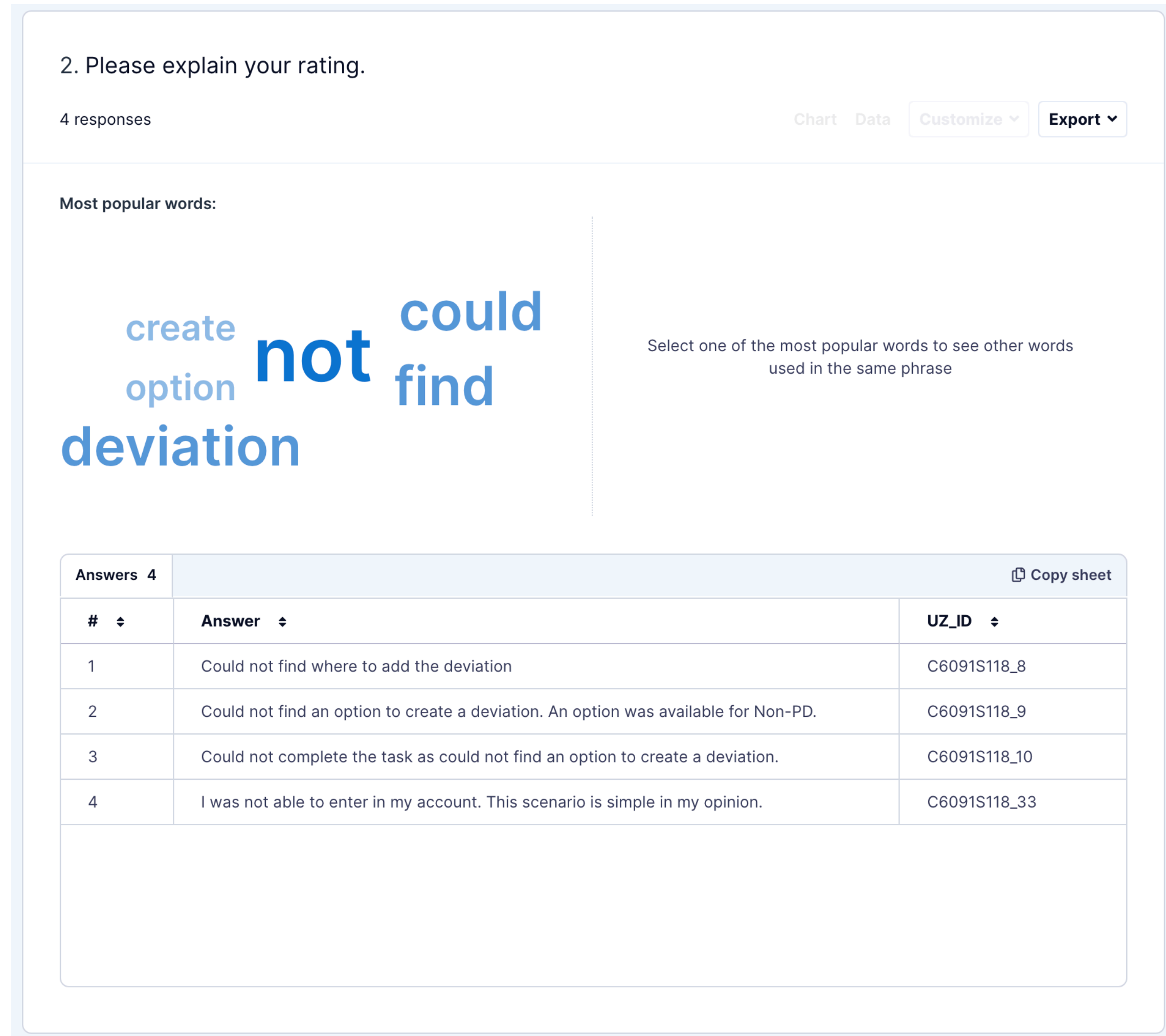
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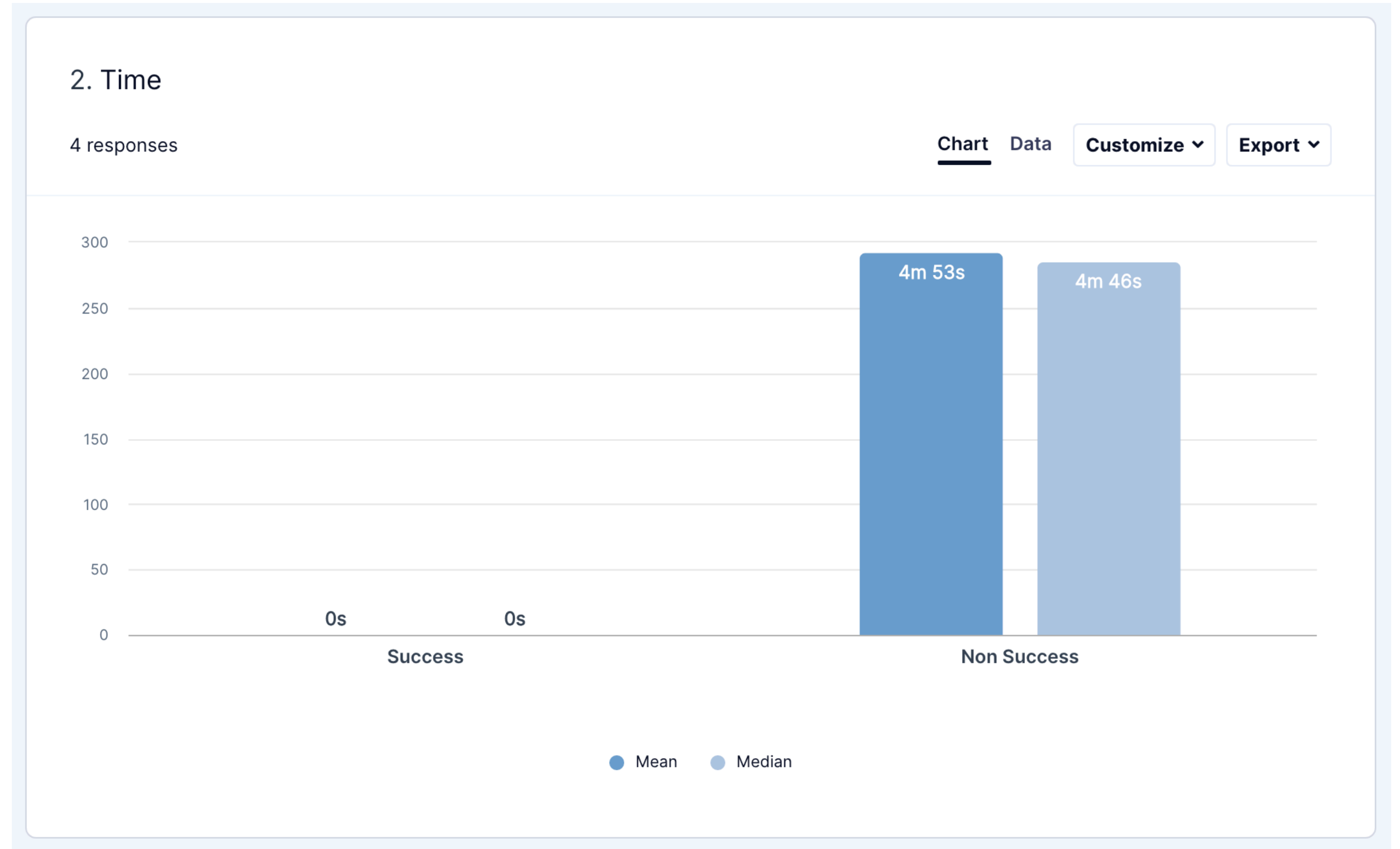
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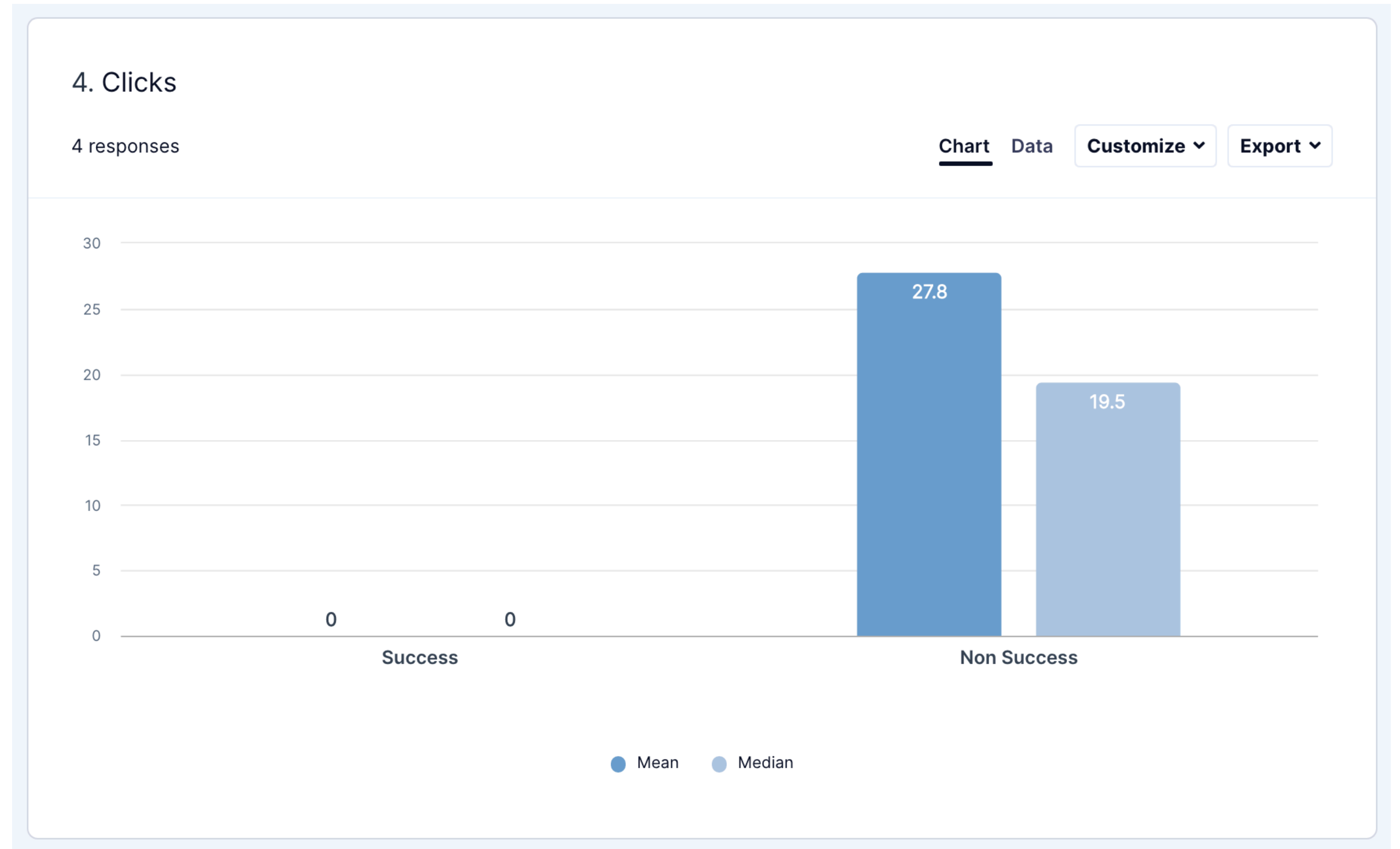
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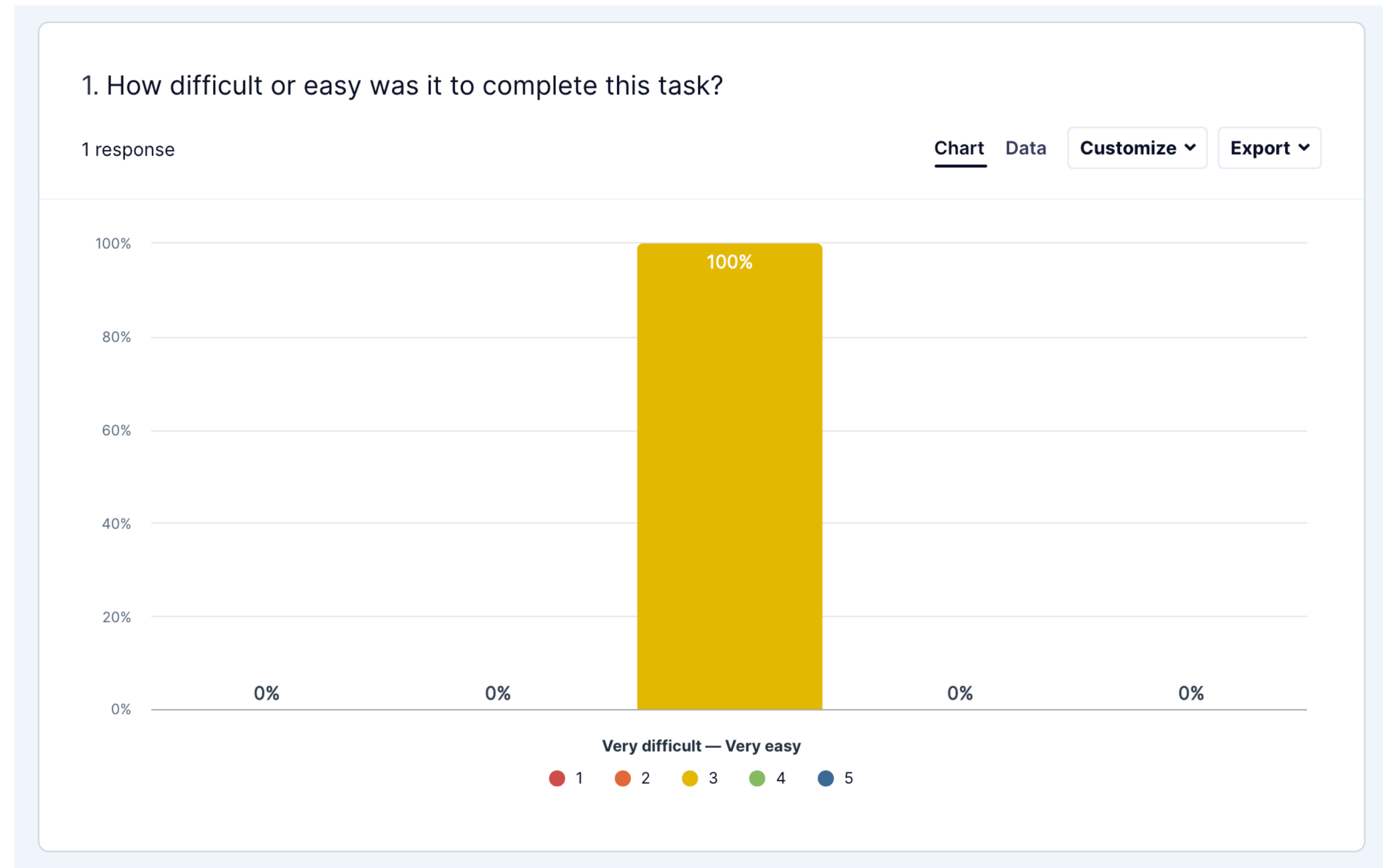
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### Scenario

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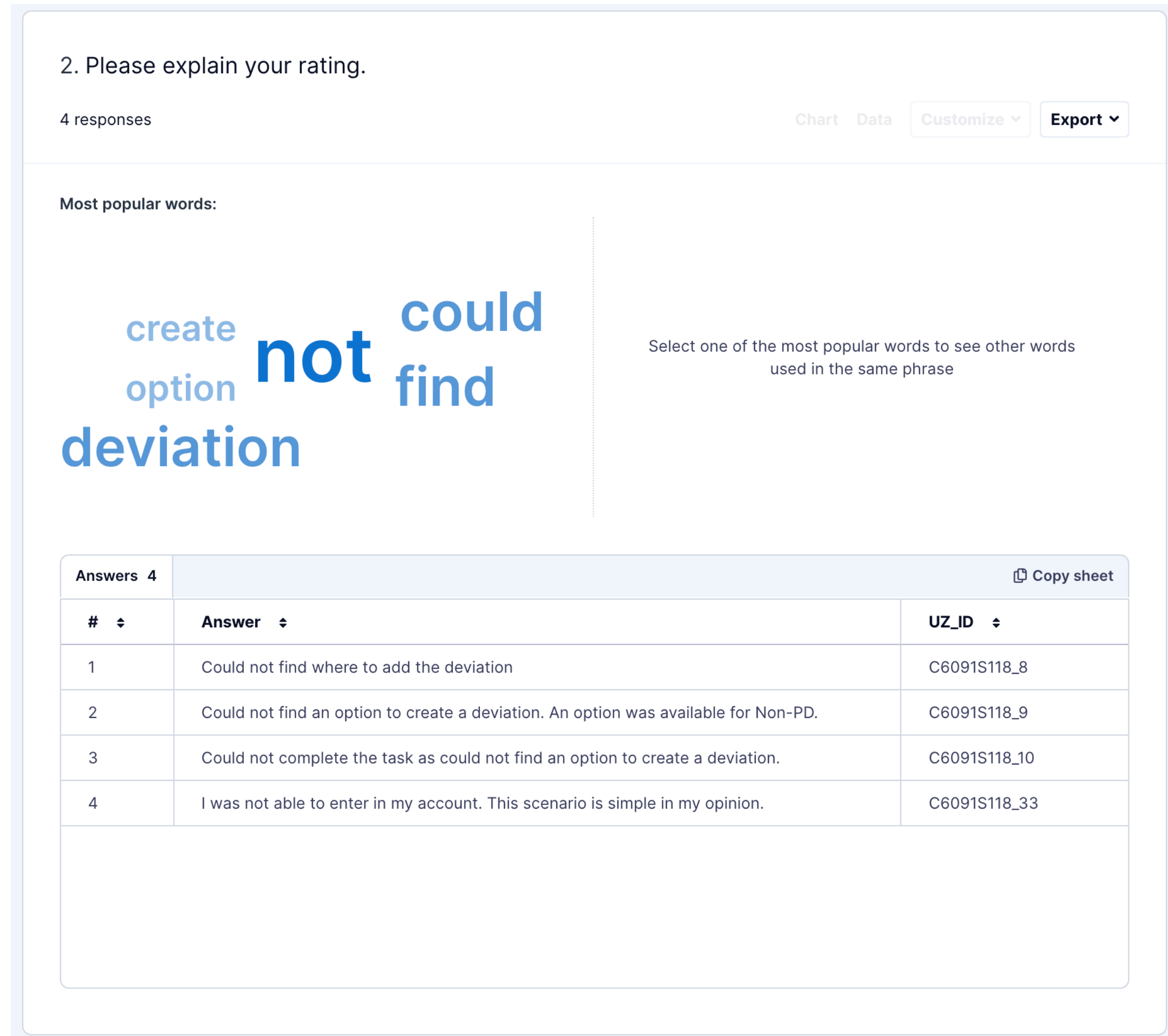
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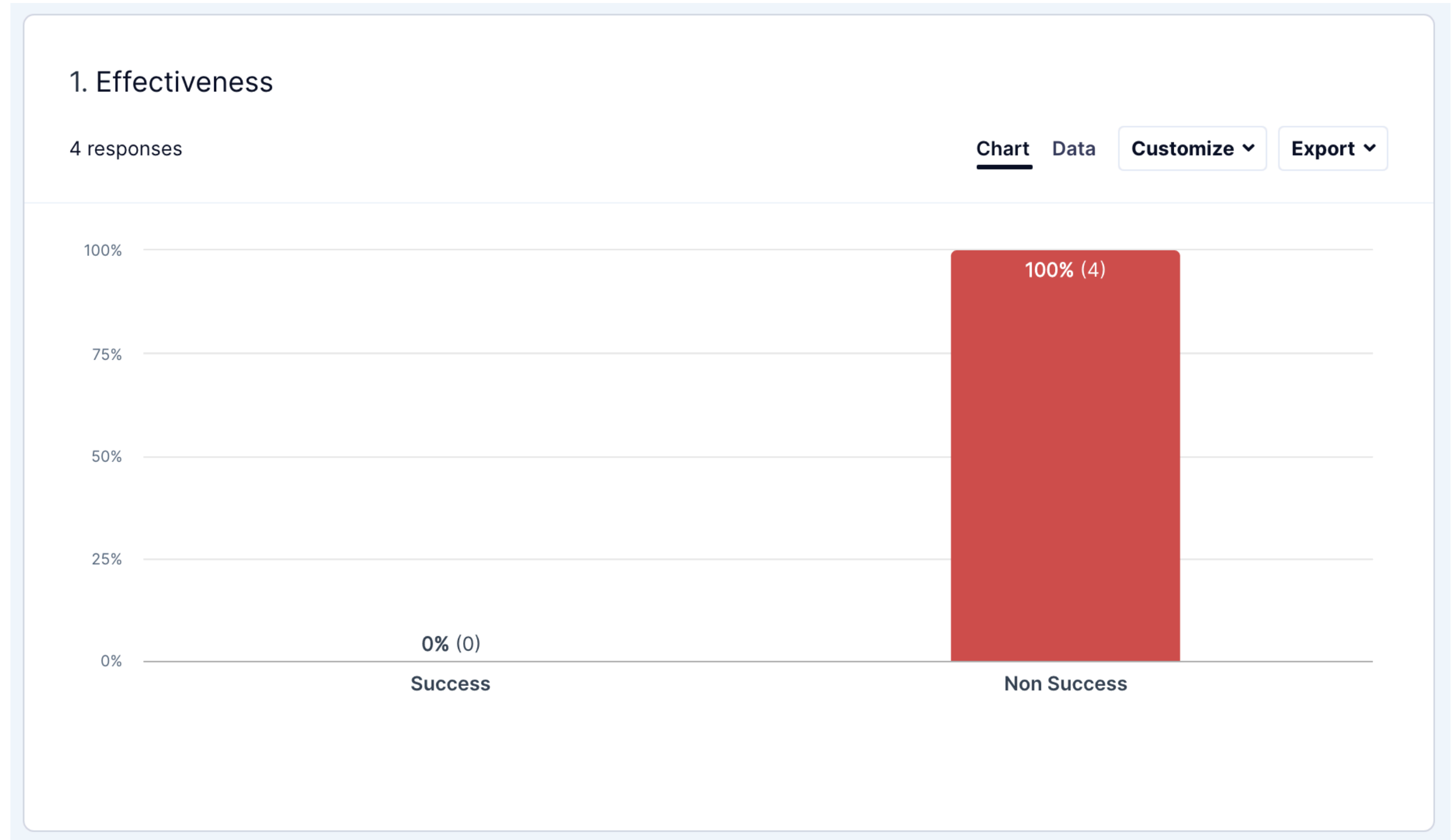
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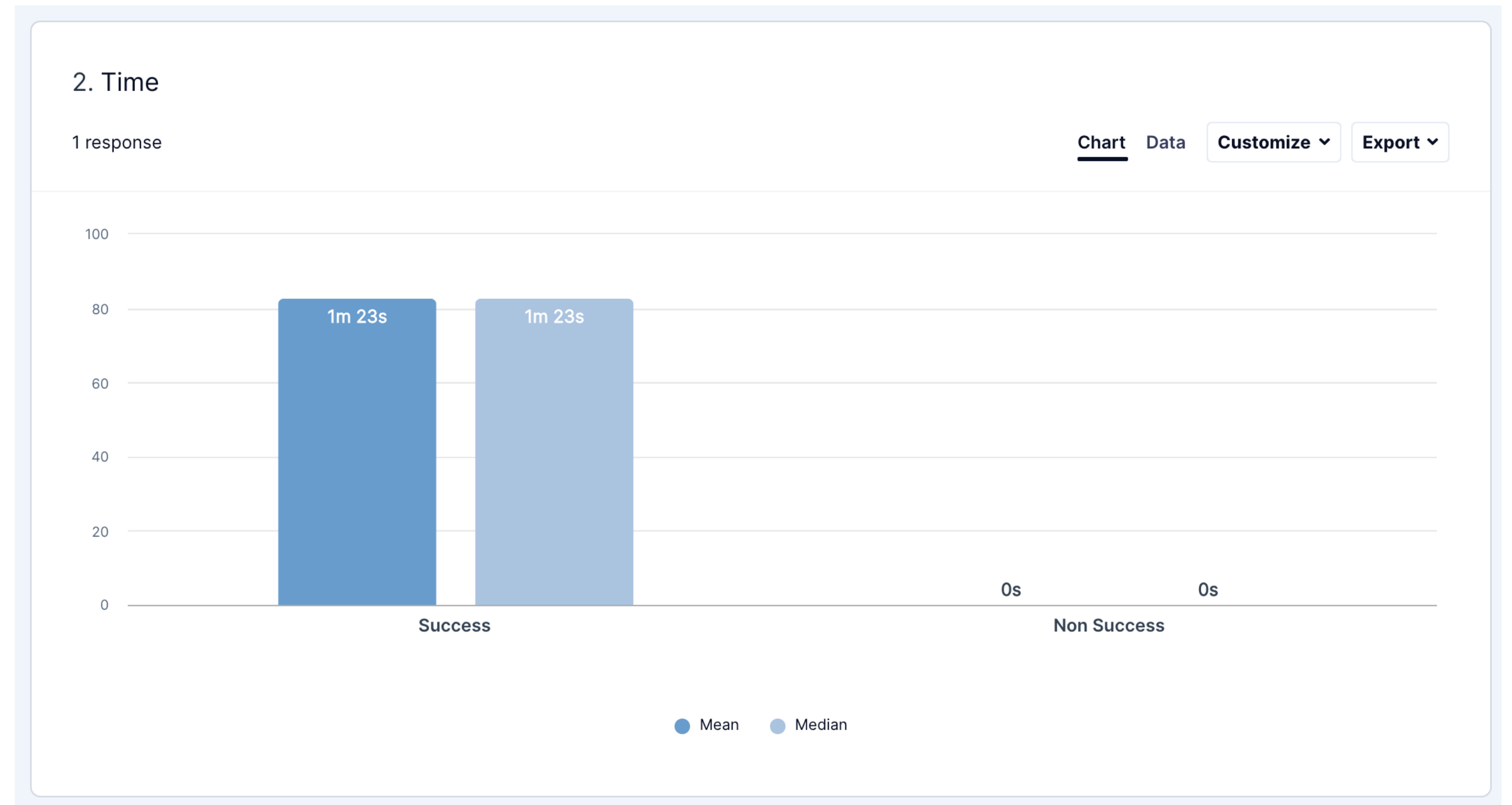
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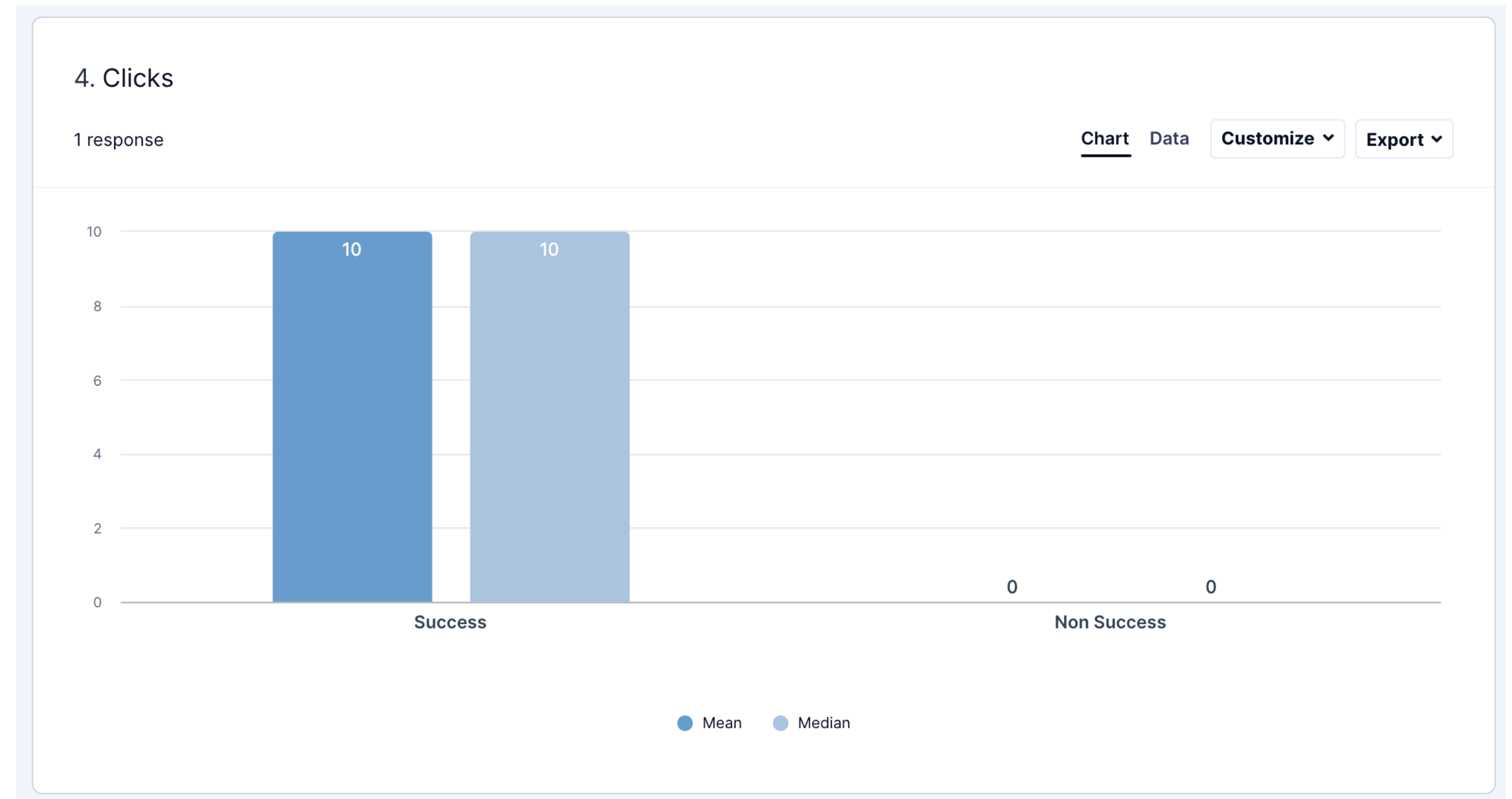
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# Issue Management - PD + Non-PD Site Issue

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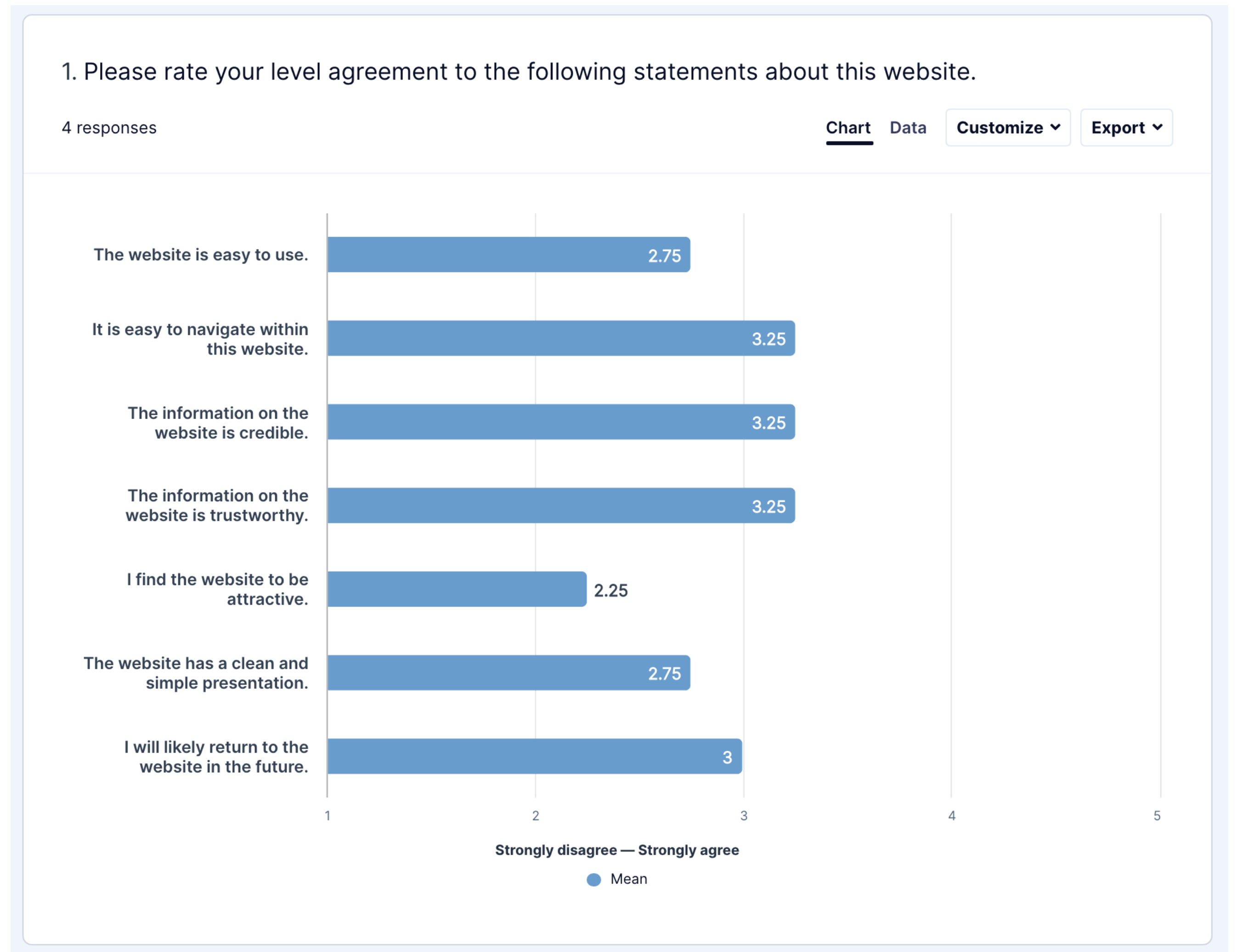
1 - Strongly Disagree

2 - Disagree

3 - Neutral

4 - Agree

5 - Strongly Agree





# Issue Management - PD + Non-PD Site Issue

What we heard



**It doesn't really show how to create a protocol deviation. I don't see an option for that in the corner, the button says: "Create Non-Study PD Issue", so I have to abandon.**

**I don't see how to create a site level issue.**

**Where are my actions? It's only letting me create one kind of issue.**

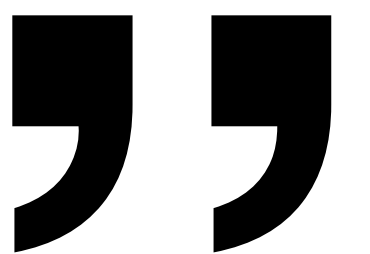
**There aren't any sites showing up when I searched for "1001"**

**2000 and the study is recruiting. Well, it's recruiting so I should have been able to use that study to create a PD unless it hasn't enrolled.**

**I couldn't find the site in my list when I tried to filter.**

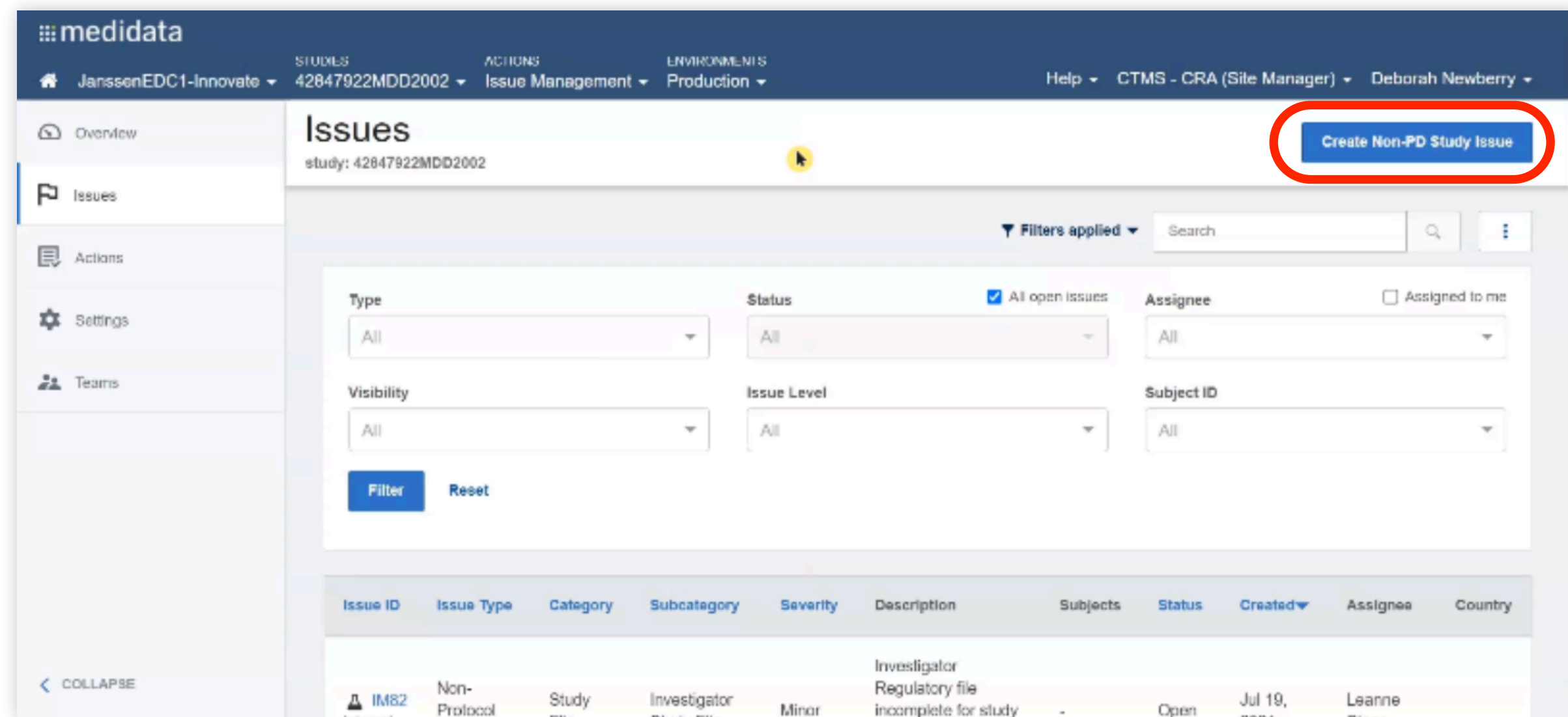
**Could not complete the task as could not find an option to create a deviation.**

**Could not find an option to create a deviation. An option was available for Non-PD.**

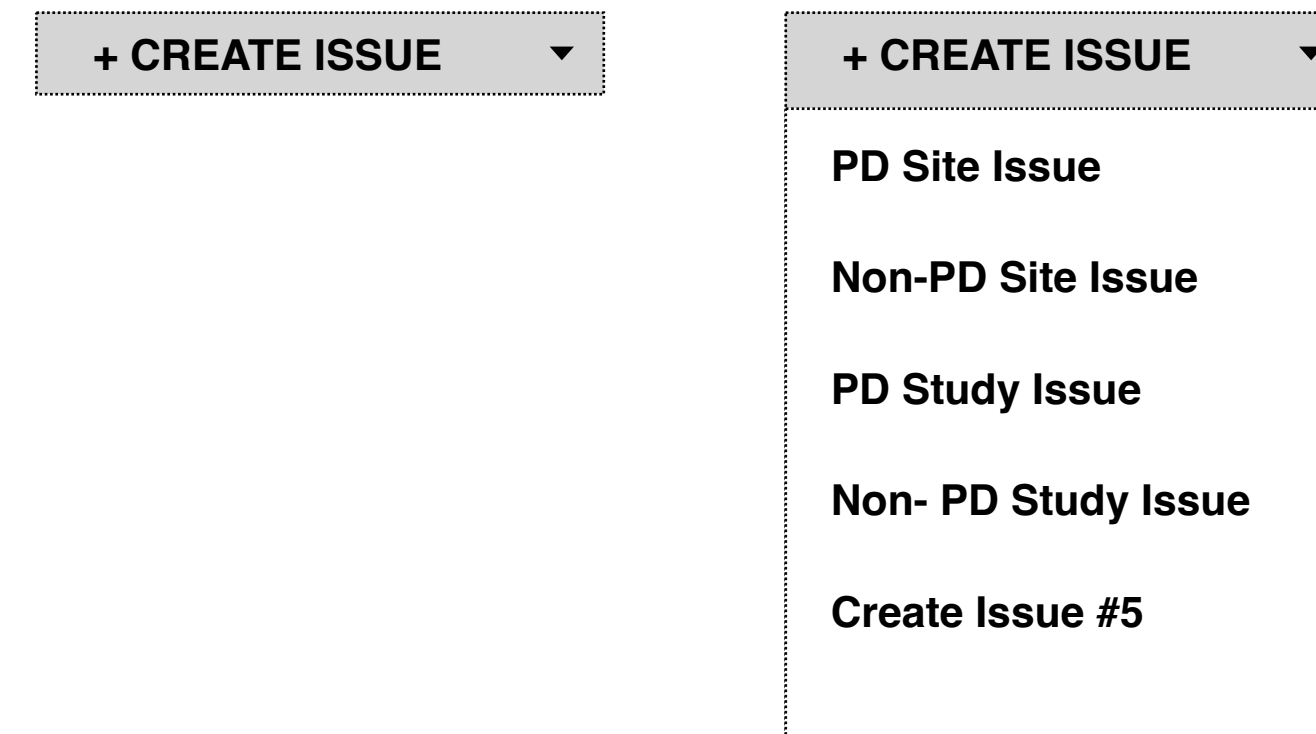


# Issue Management - PD + Non-PD Site Issue

## Recommendations



*Using a general label to display items available for creation*



*The specificity of the label itself may be detracting from user's confidence*



When landing on the Issues section of Issue Management, the main button label was a source of confusion.

**“So I'm going to go back to issue management and see if I can create it, No, there is not an option to create a PD Site Issue. Only an option to create a Non PD Study Issue. I cannot complete this task.”**

# Issue Management - PD + Non-PD Site Issue

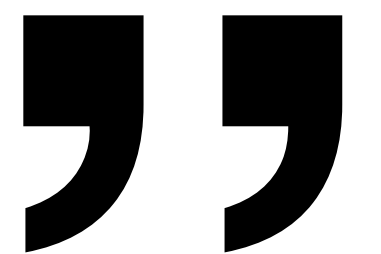
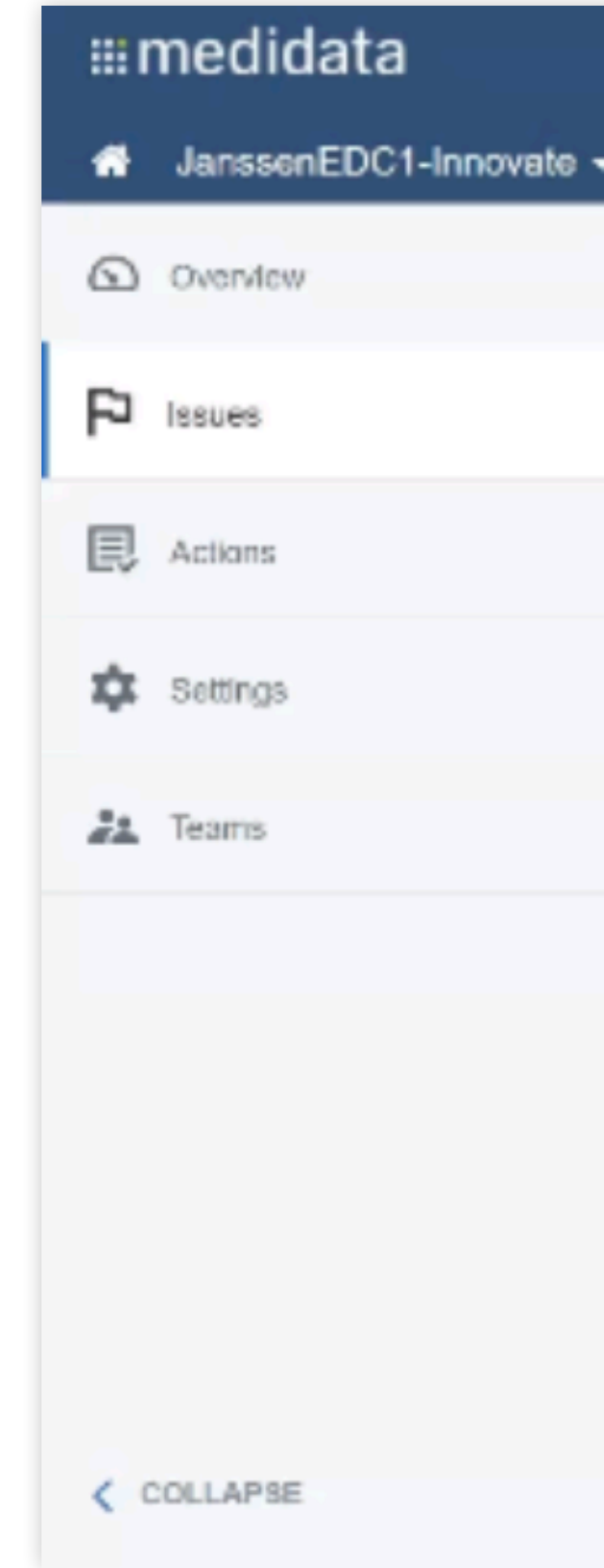
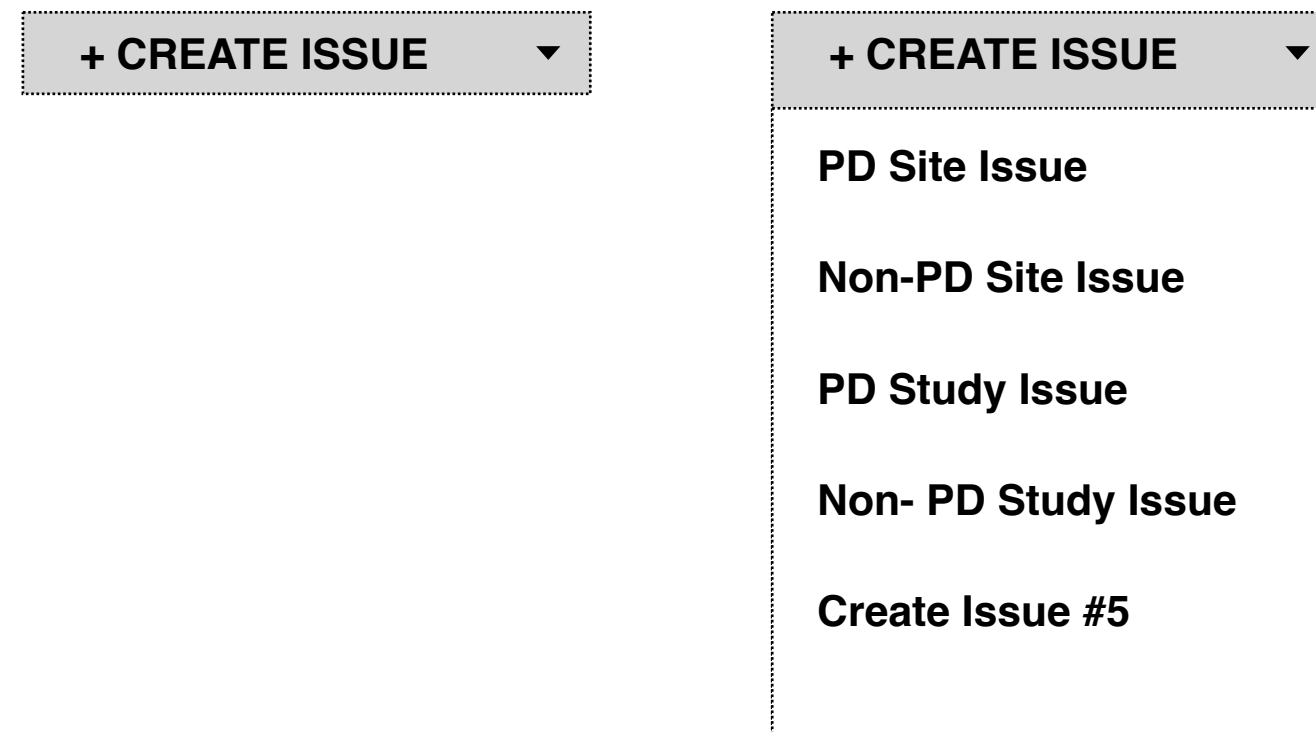
What we heard



**Where are my actions? It's only letting me create one kind of issue.**

Some users expected to be able to create the issue from the "Issues" tab, rather than the "Actions" one

*Allow users to take actions and create items within the respective environment*



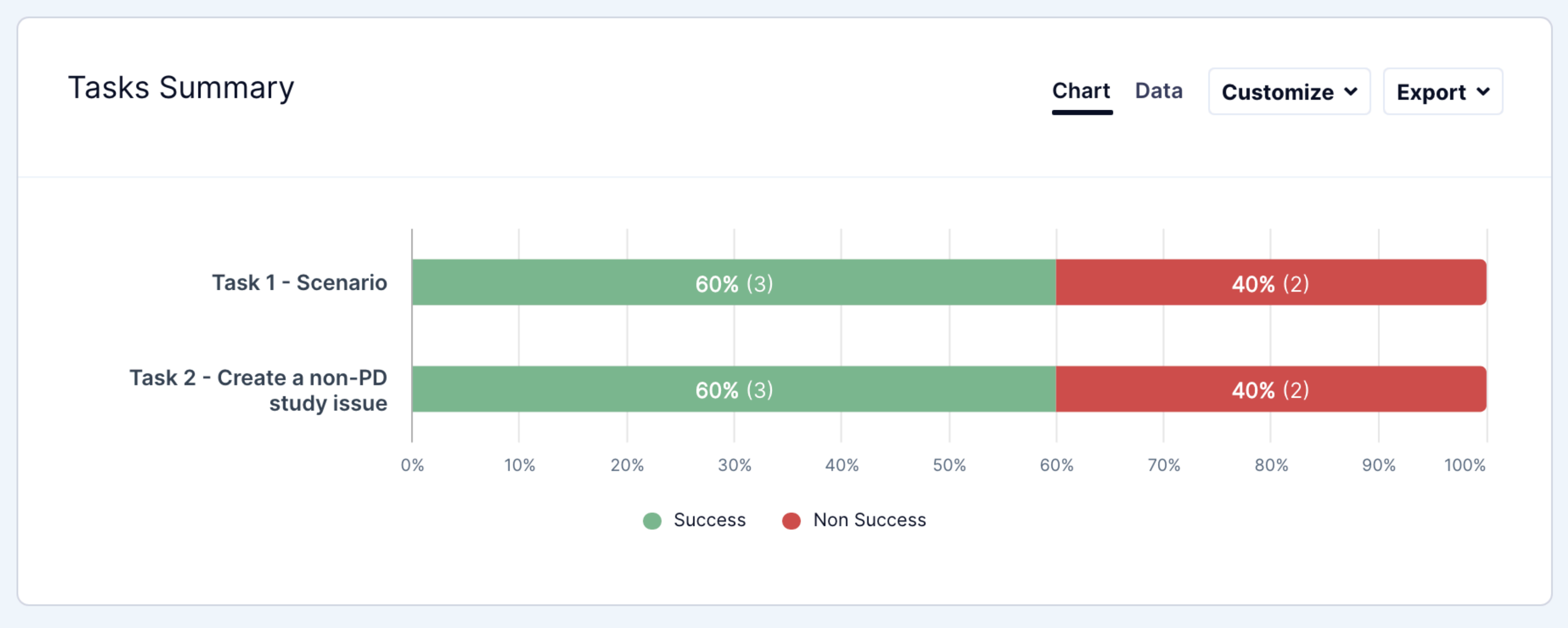
# Non-PD Study Issue

**Issue Management**

# Issue Management - Non-PD Study Issue

## Task Summary

Testers: **CTM, CTM, CTM**



# Issue Management - Non-PD Study Issue

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### Scenario

Electronic Patient Reported Outcomes (ePRO) tablet is recording erroneous date and time stamp for data. Programming update required through a data transfer to correct. The back-end programming error is impacting hundreds of devices across all countries and majority of sites in the study.

### Create a non-PD study issue

1. Select the study record 42847922MDD2002
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2. Please explain your rating.

5 responses Chart Data Customize Export

Most popular words:



Select one of the most popular words to see other words used in the same phrase

Answers 5 <span>Copy sheet</span>		
#	Answer	UZ_ID
	member who had been added.	
2	It would be good, if I can find the member lists who were added to the study. Maybe it's already available on the page, but I was not very sure where I can find it.	C6091S116_26
3	First tiem I did it, it was difficult to find the Issue management section	C6091S116_44
4	When trying to create a non-PD issue I could not complete some fields such as category, subcategory and for this reason the first task could not be completed. The second task either because I did not find the field study record to search for 42847922MDD2002. Either it 's not very intuitive or something is wrong with my account because I 've been using CTMS for 7 years with no issues, it 's kind of frustrating not being able to complete the tasks. Looking forward to your feedback.	C6091S116_59
5	I was unable to log in due to I'm unsure the password and username. I am not able to locate an email with the information.	C6091S116_63

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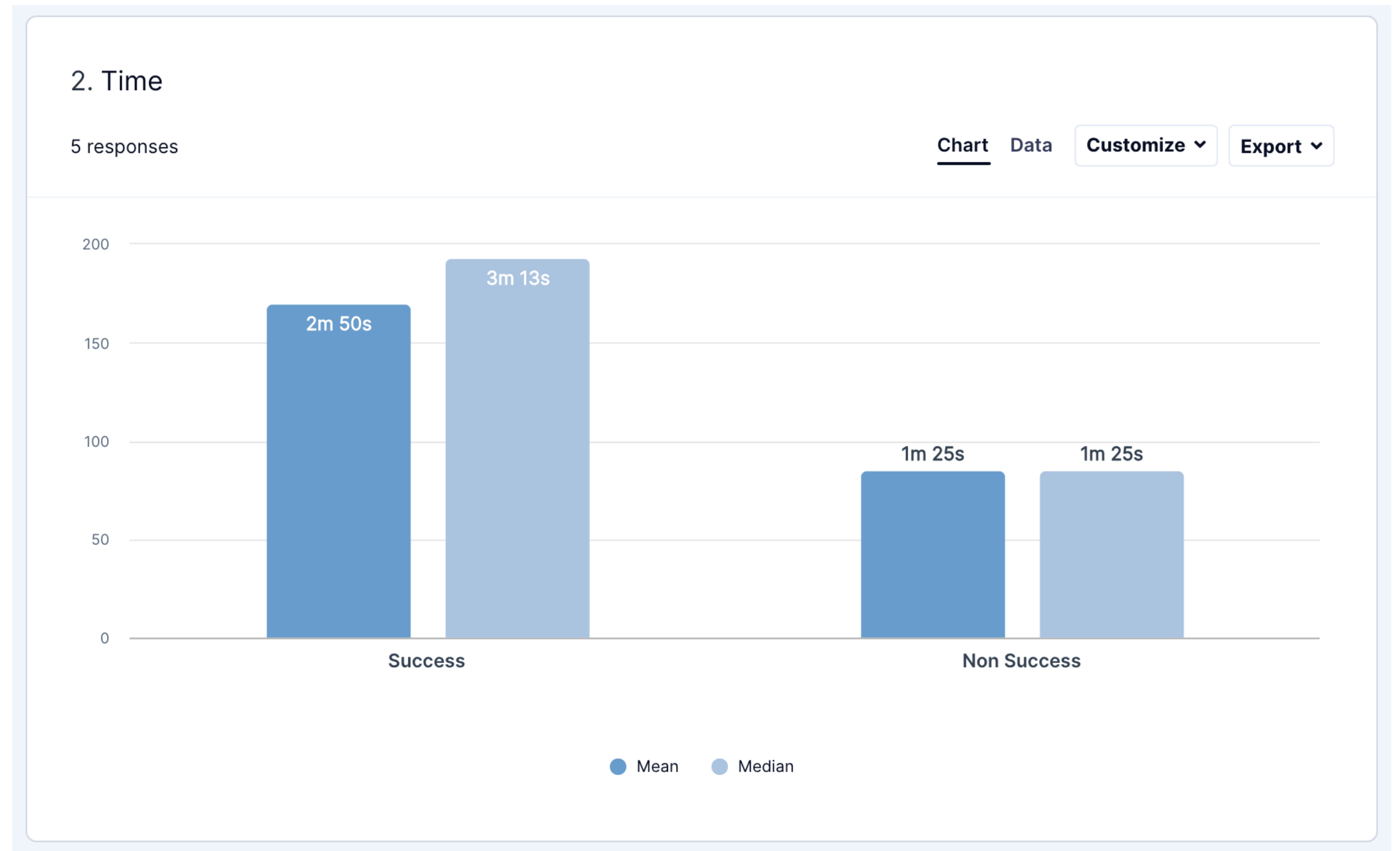
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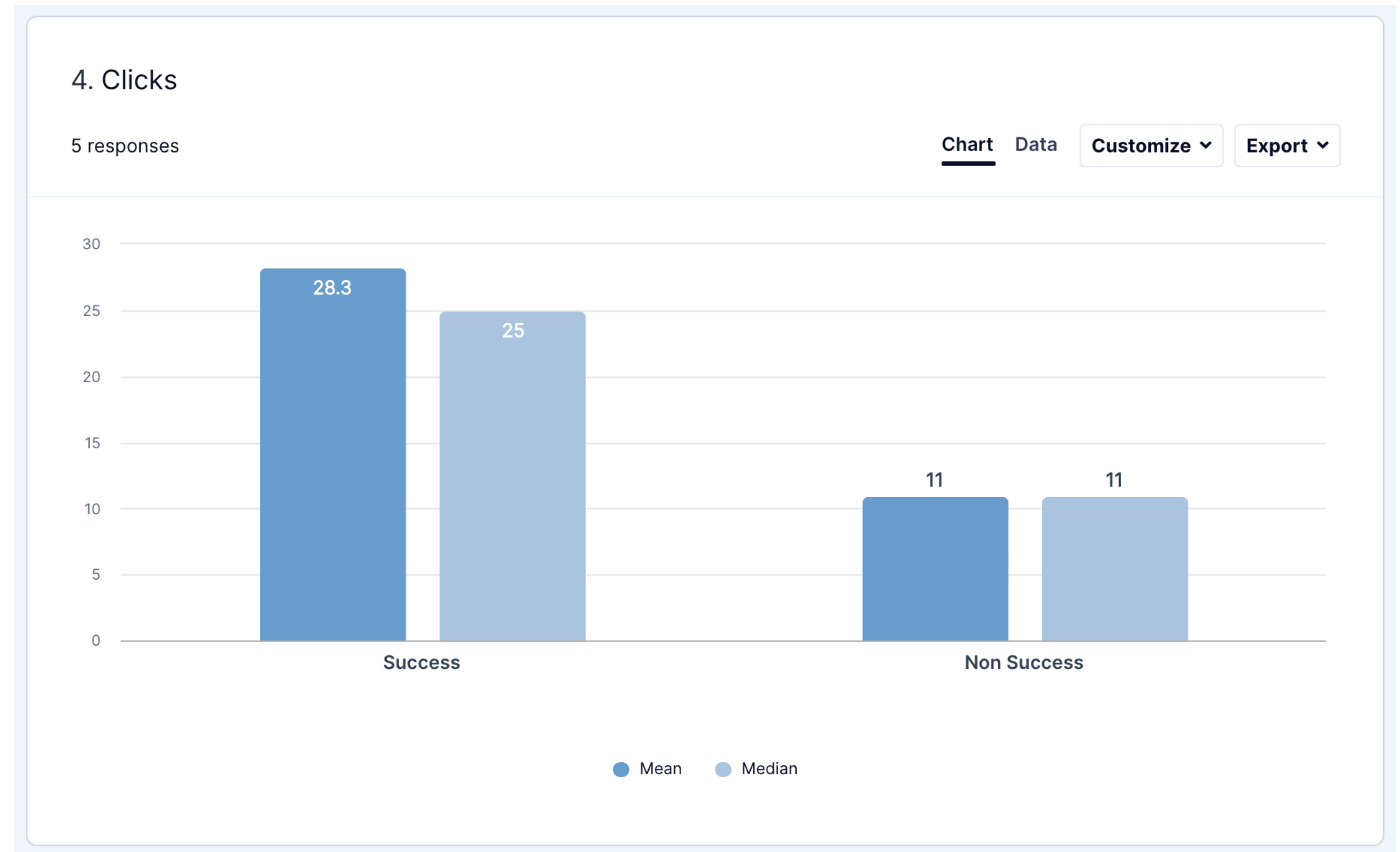
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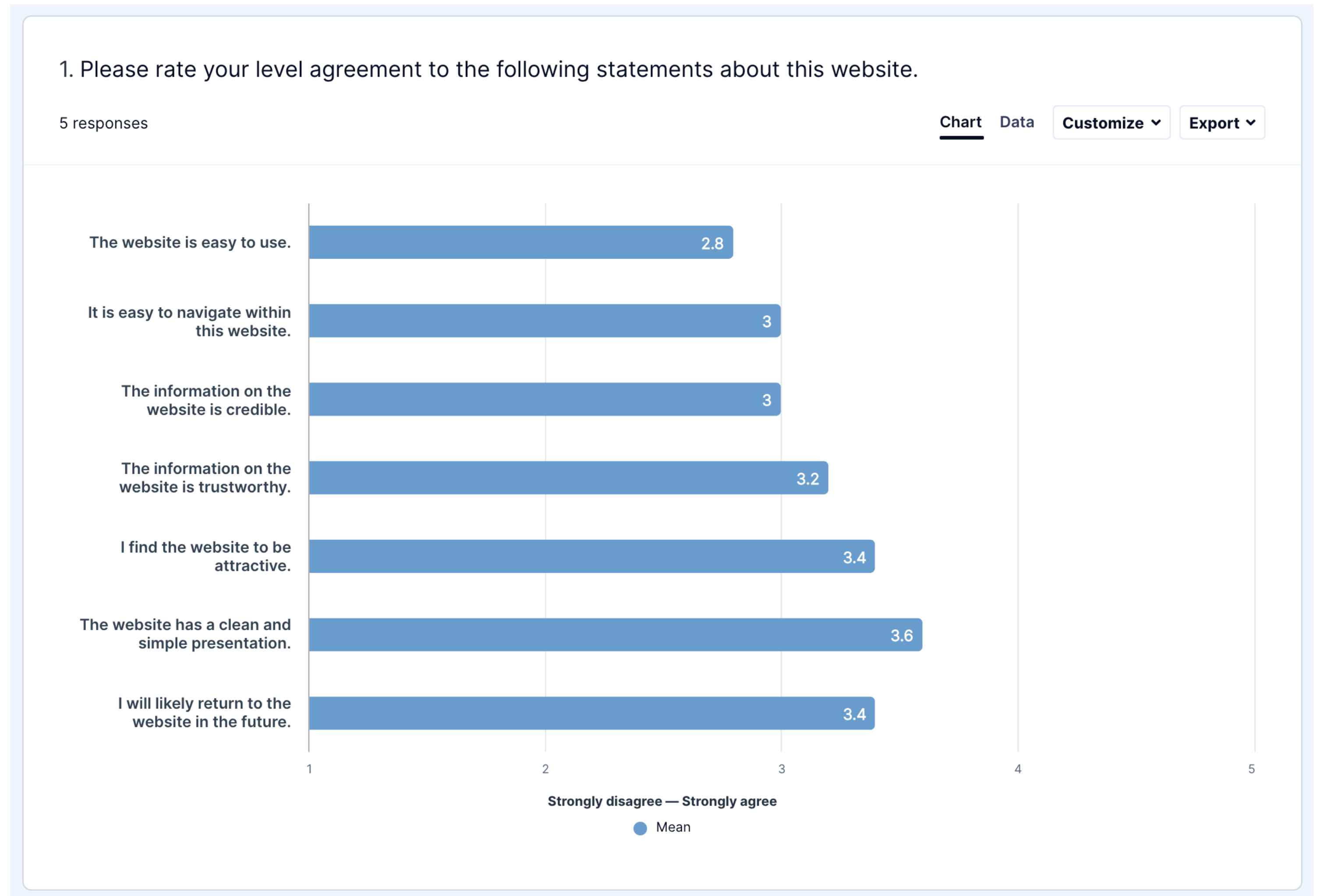
1 - Strongly Disagree

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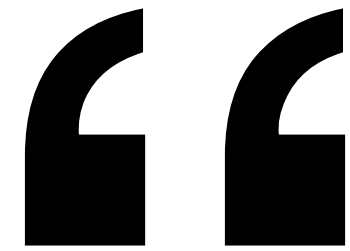
4 - Agree

5 - Strongly Agree

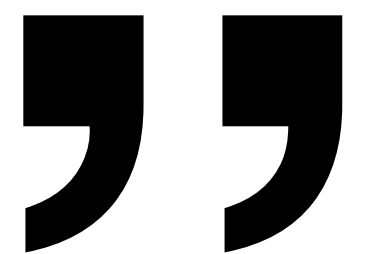


# Issue Management - Non-PD Study Issue

What we heard



**When trying to create a non-PD issue I could not complete some fields such as category, subcategory and for this reason the first task could not be completed. The second task either because I did not find the field study record to search for 42847922MDD2002. Either it's not very intuitive or something is wrong with my account because I've been using CTMS for 7 years with no issues, it's kind of frustrating not being able to complete the tasks.**

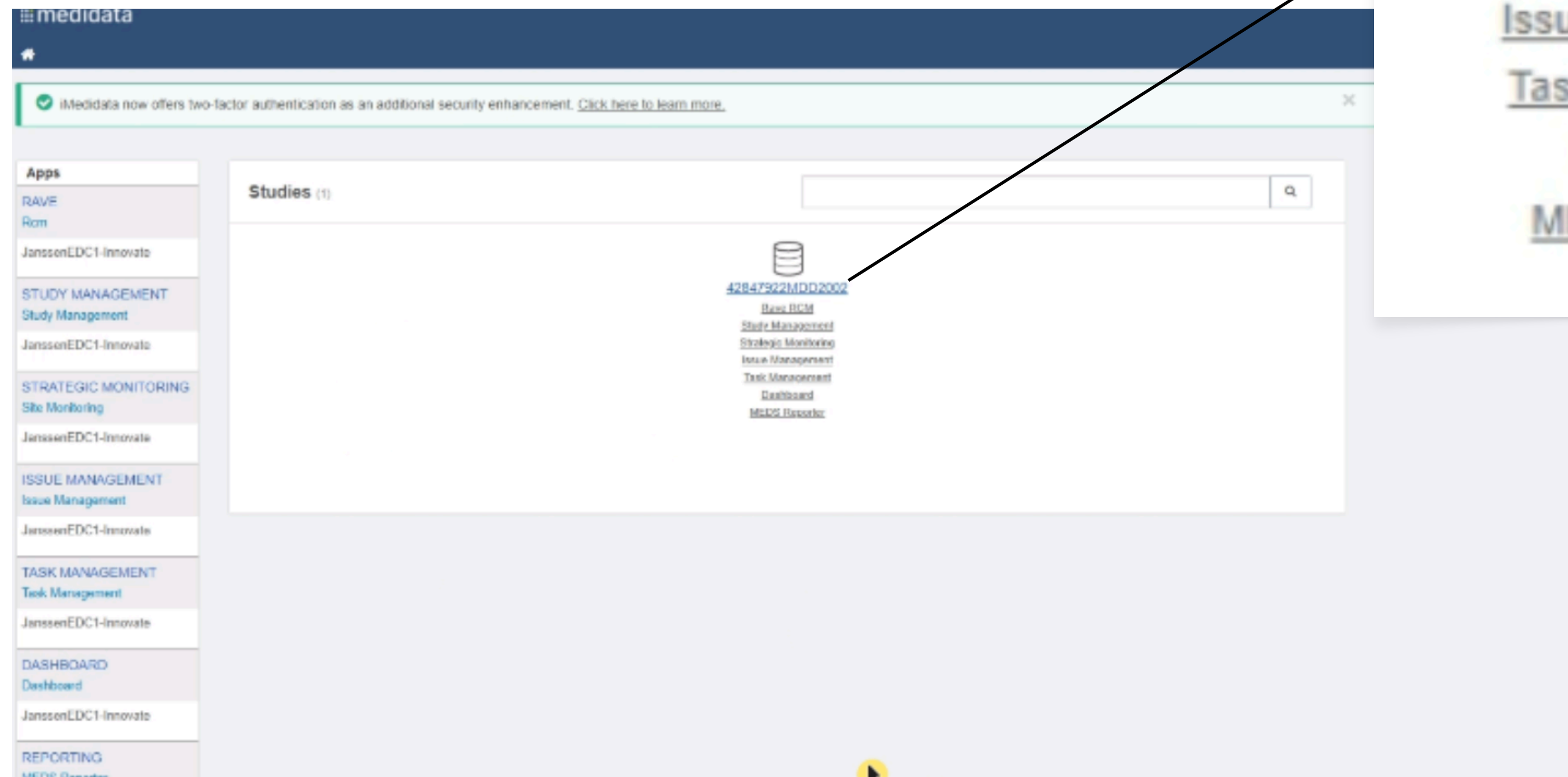


# Issue Management - Non-PD Study Issue

Recommendations



It was difficult to find the Issue Management section.



[42847922MDD2002](#)

[Rave RCM](#)

[Study Management](#)

[Strategic Monitoring](#)

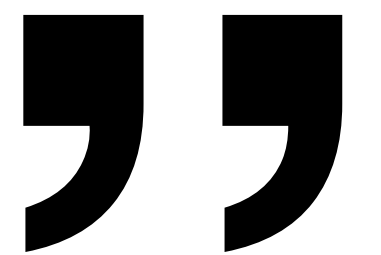
[Issue Management](#)

[Task Management](#)

[Dashboard](#)

[MEDS Reporter](#)

And so here I am now I have to go to the issue management module which is easy to find here in all the options. So that's nice.



# Issue Management - Non-PD Study Issue

## Recommendations

*Increasing the minimum text size to 14px will help accessibility issues*



*Spacing elements to make the list more scannable.*

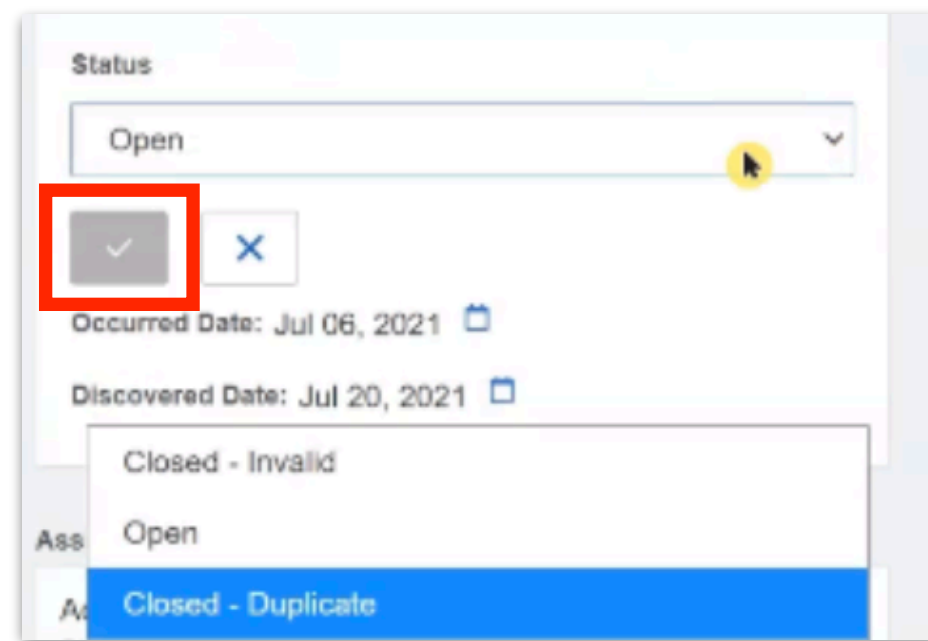
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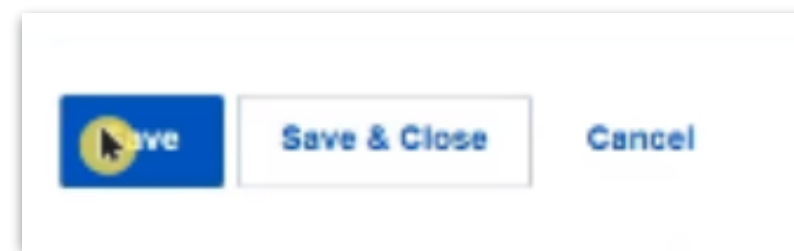
## Recommendations

“How do I review it and close it out? I don’t see the button to save.”

*Users noted they were unable to confirm changes through a save button*

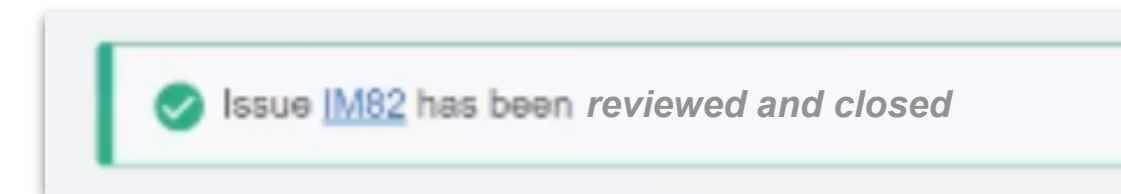


*One of these button sets at the end of the form would be helpful*



“I don’t see a Save button. If I leave will it stay?”

*Although the Status changed, users weren’t confident their edits would be saved.*



*Leveraging existing patterns to reinforce user decisions (Snack-bars)*

*Global toggle for enabling Edit Mode/Save changes. On click all fields become editable, “Edit” Button becomes “Save” while edit mode is active*



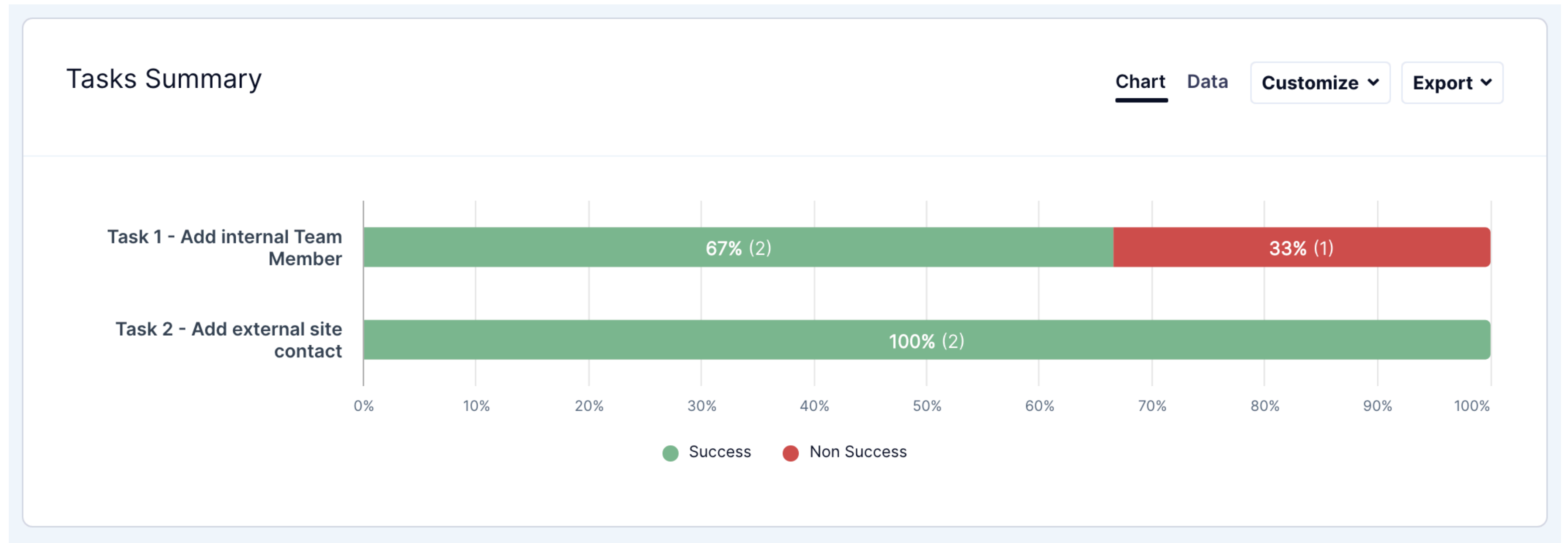
# Study Management



# Study Management

## Task Summary

Testers: **LTM, CTA, CTA**



# Study Management

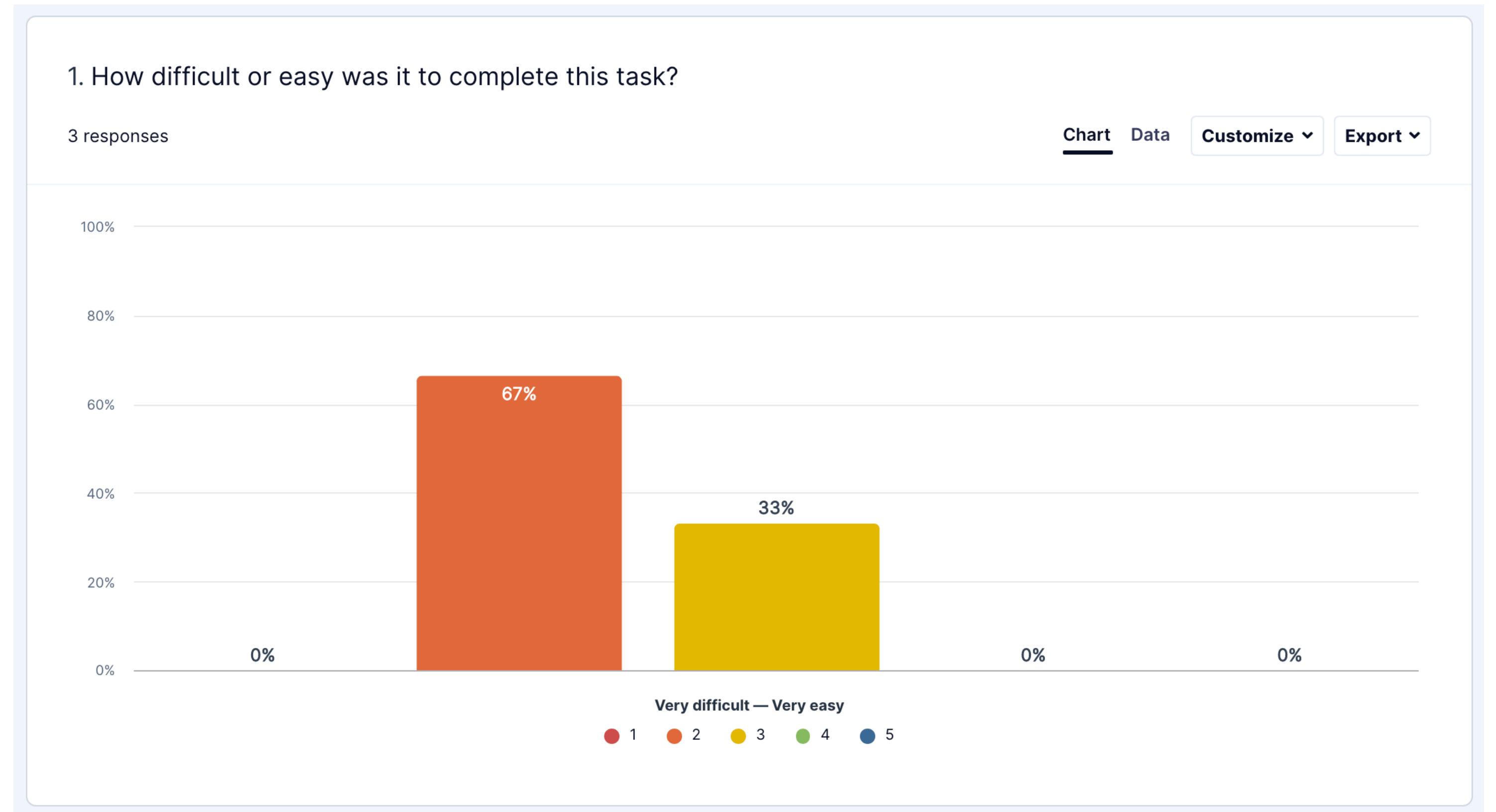
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### Scenario:

Add yourself as an Internal Team Member to study 'CTMS\_EVAL\_UXUI2'

### Add yourself as an Internal Team Member

Login to Innovate: <https://innovate.medidata.com/> and use the Study Management Module to add yourself as an Internal Team Member with the Role in Study as either 'Clinical Research Associate', 'Country Manager' or 'Study Manager.'



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2. Please explain your rating.

3 responses Chart Data Customize Export

Most popular words:

not have steps

Select one of the most popular words to see other words used in the same phrase

Answers 3 <span>Copy sheet</span>		
#	Answer	UZ_ID
1	Steps are not fully explained to move forward	C6091S114_36
2	add yourself and a mate it is not easy, you have to take several steps.	C6091S114_40
3	It was no intuitive, where you can find the ootion, and the information that I have to update in CTMS is no clear. I need to know my role, the country, in order to know where and how I have to update CTMS.	C6091S114_42

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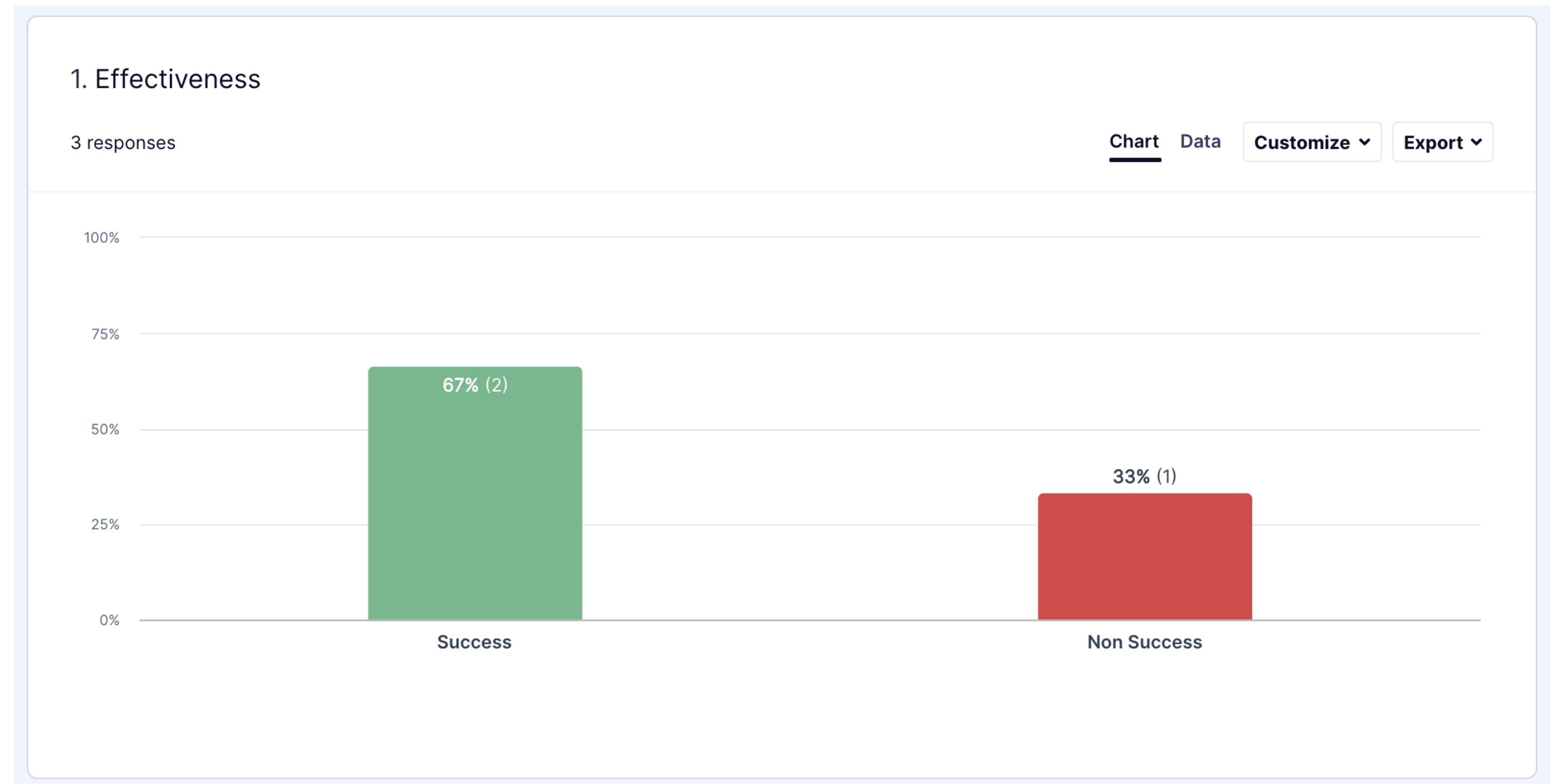
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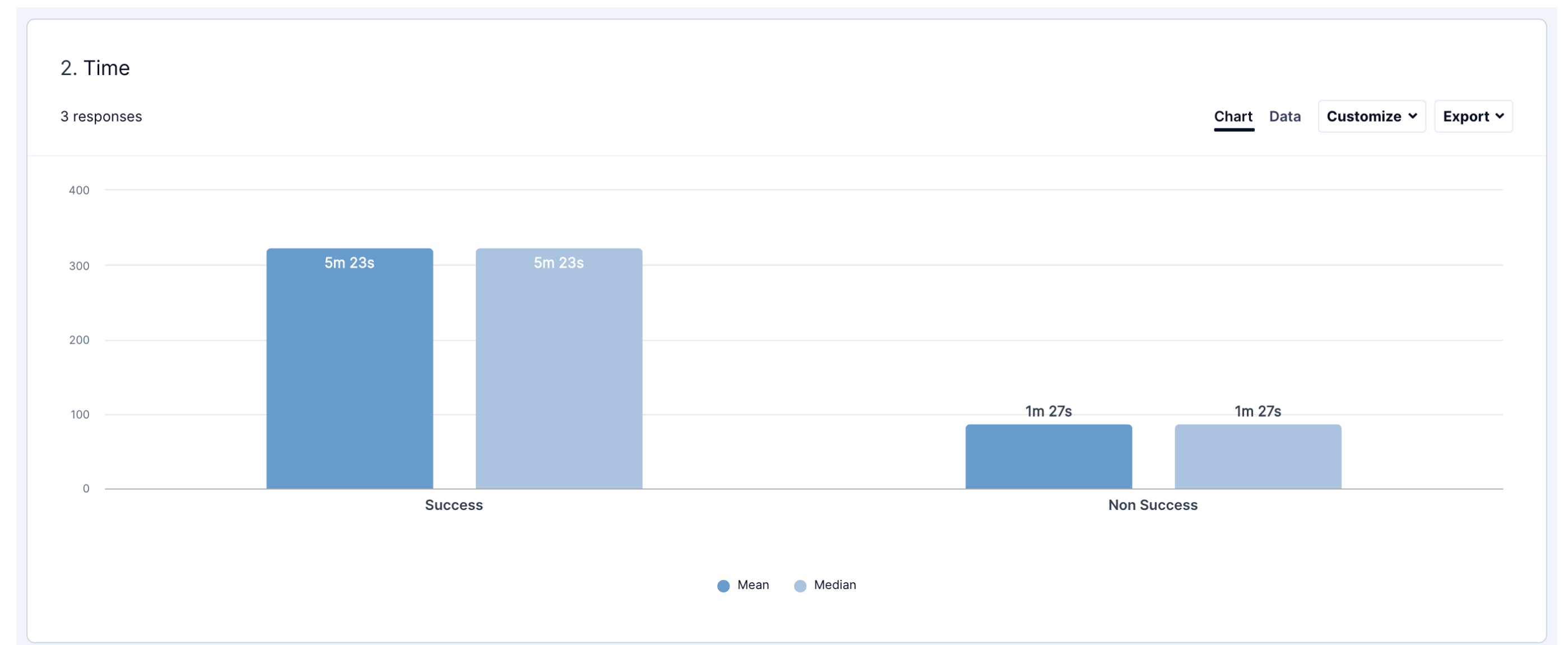
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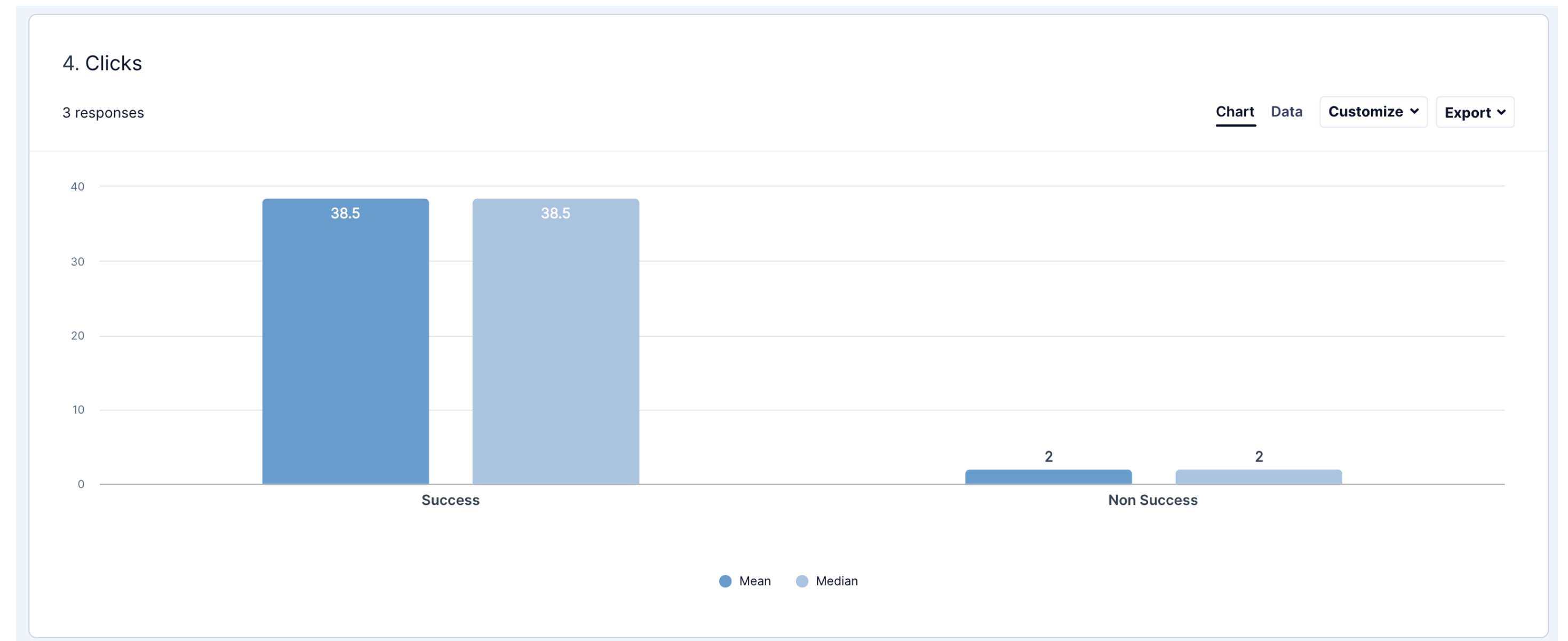
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### Scenario:

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Login to Innovate <https://innovate.imedidata.com/> and use the Study Management Module to add a 'Clinical Research Coordinator' to a site.



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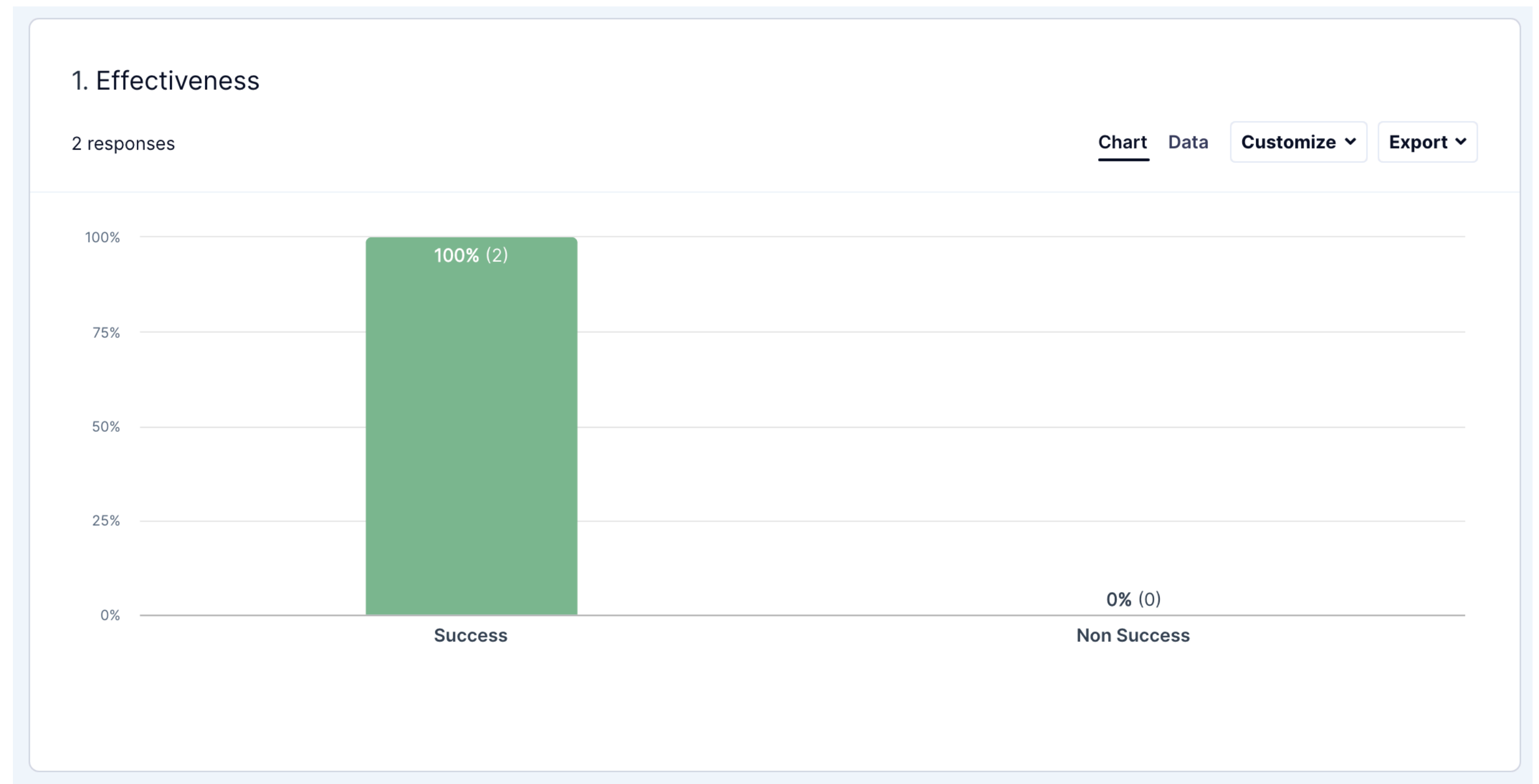
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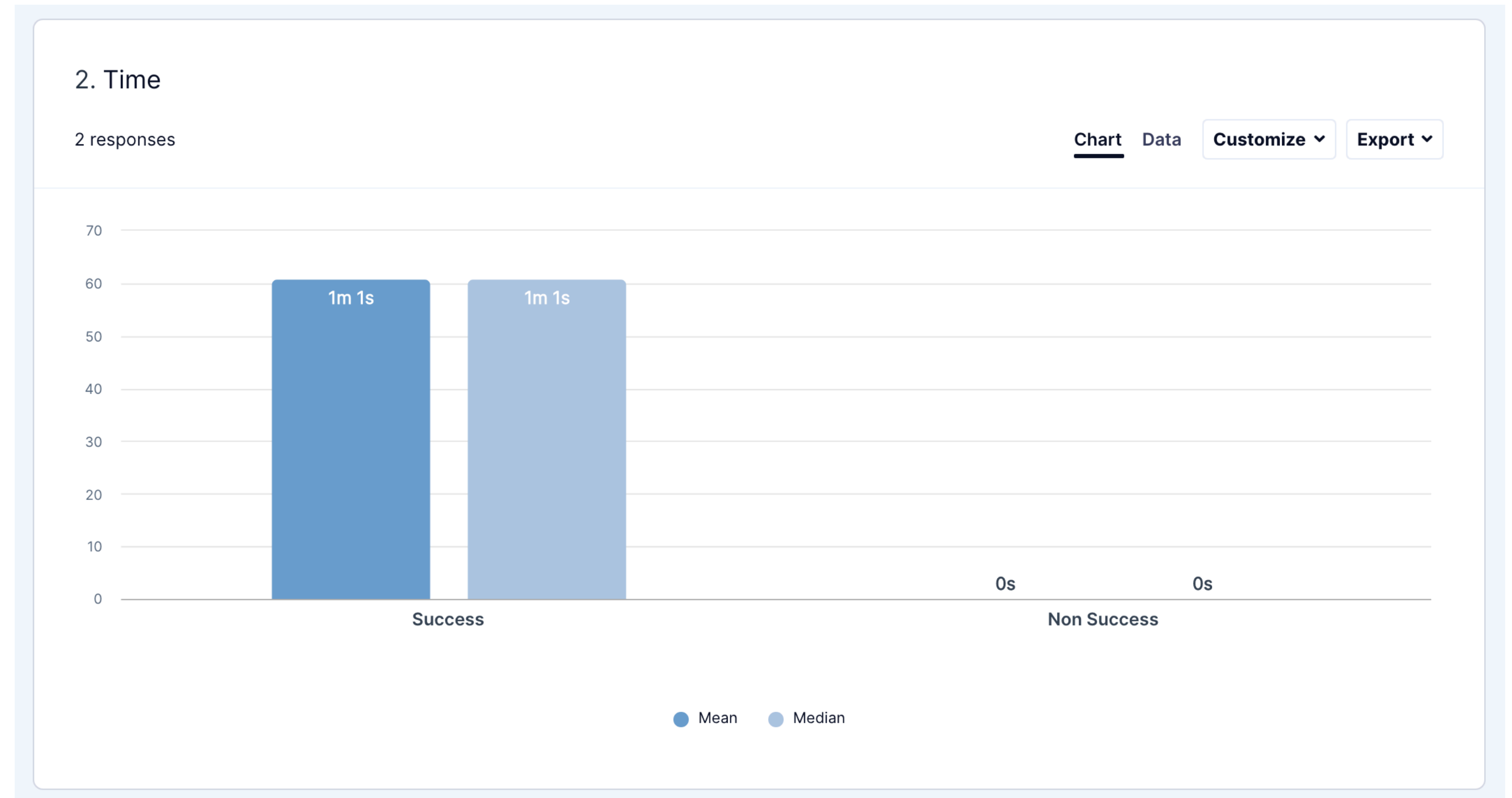
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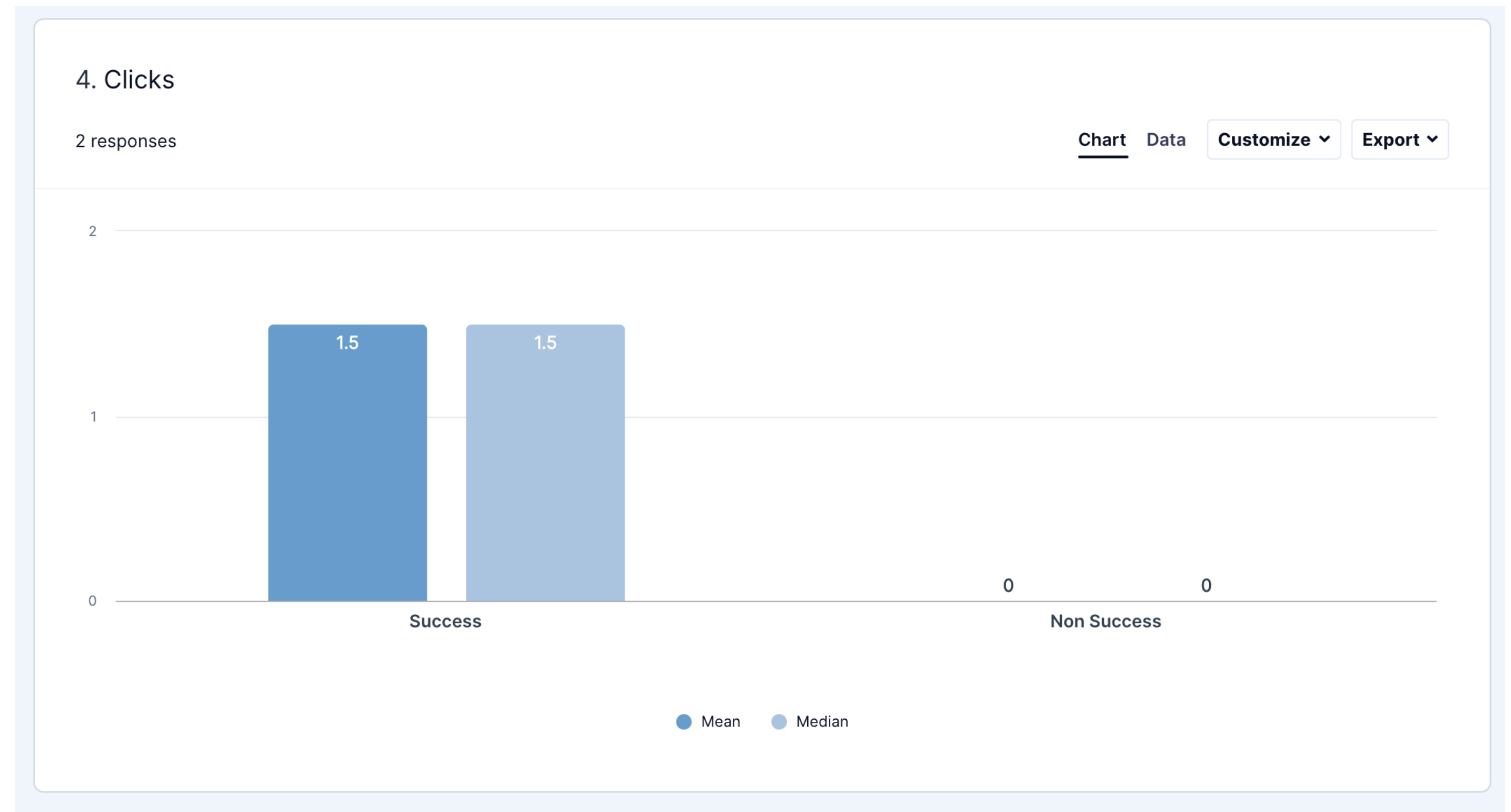
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## Quality of Experience (Qx) Score

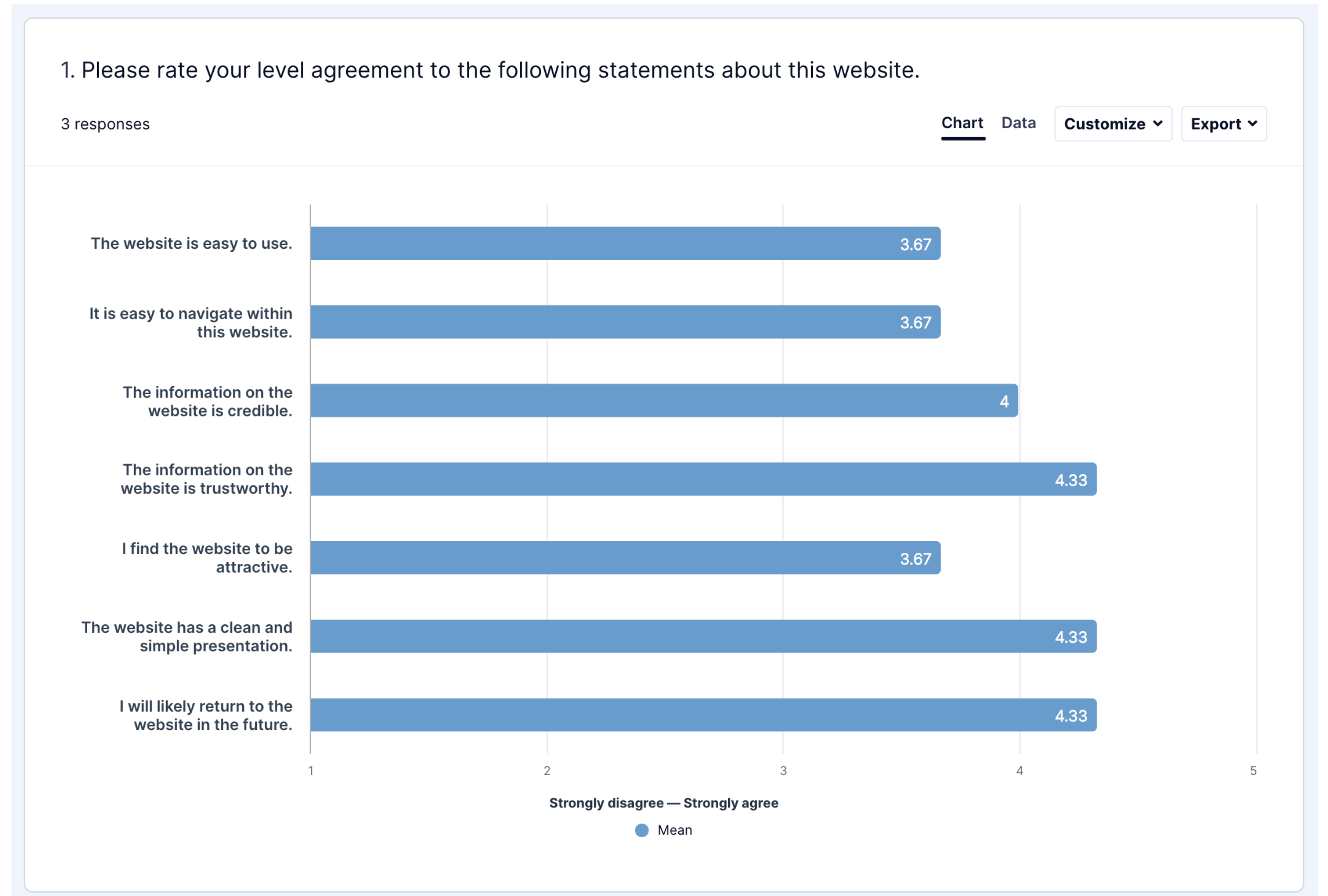
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# Study Management

## What we heard



**It would be a good feature if I could find the member lists who were added to the study. Maybe it's available on the page but I wasn't very sure where to find it.**

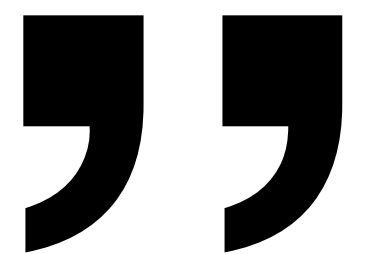
**It was not intuitive, where you can find the option, and the information that I have to update in CTMS is not clear. I need to know my role, the country, in order to know where and how I have to update CTMS.**

**Adding yourself and a mate it is not easy, you have to take several steps.**

**On the Manage Teams page I'm not really sure where I should click, probably the Quick Production page from the drop down?**

**Steps are not fully explained to move forward**

**I wasn't sure if I successfully added the team member or not.**

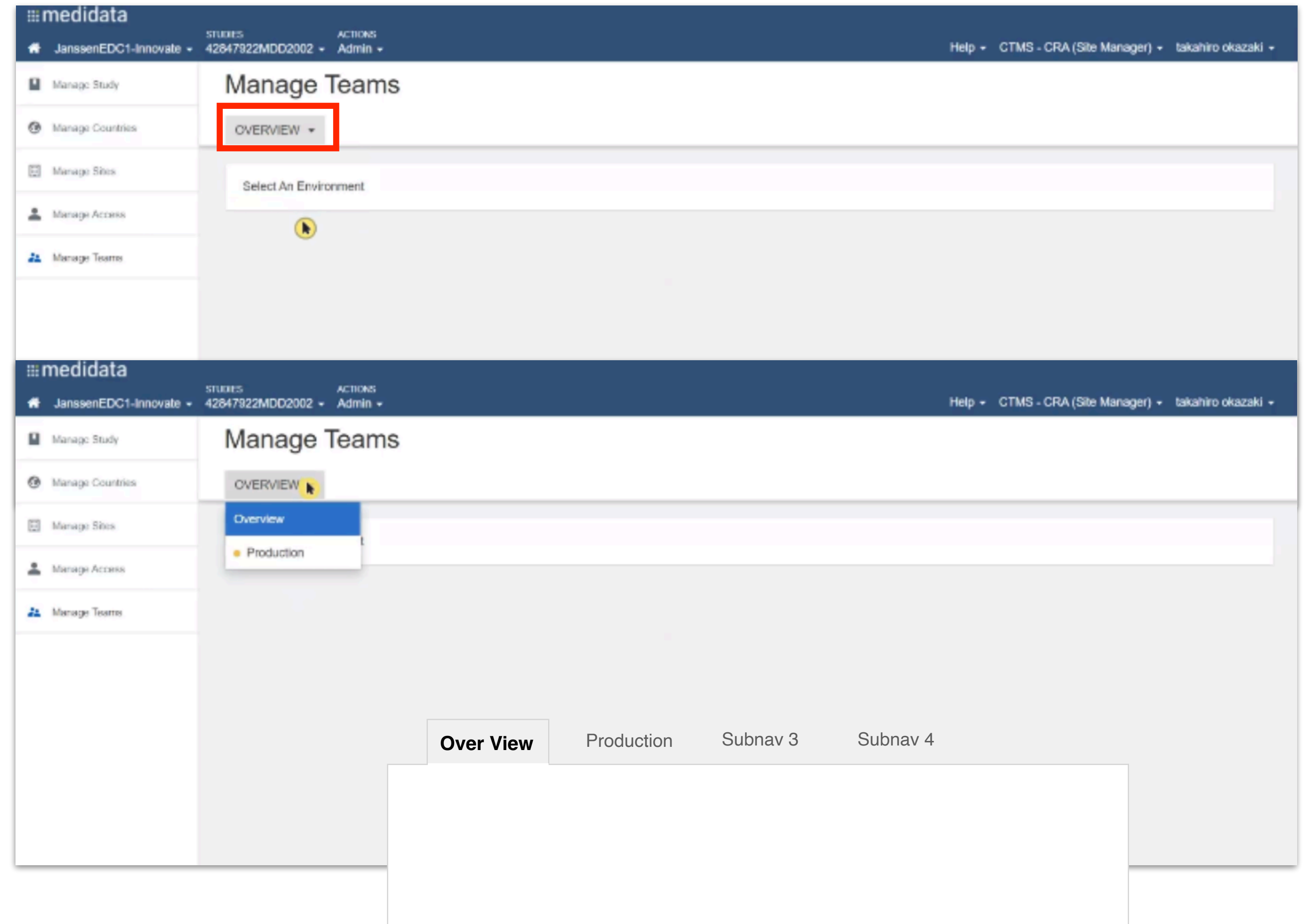


# Study Management

## Recommendations

Direction was unclear for some users as to their next step upon landing on the “Manage Teams” page

“On the Manage Teams page I’m not really sure where I should click, probably the Quick Production page from the drop down?”

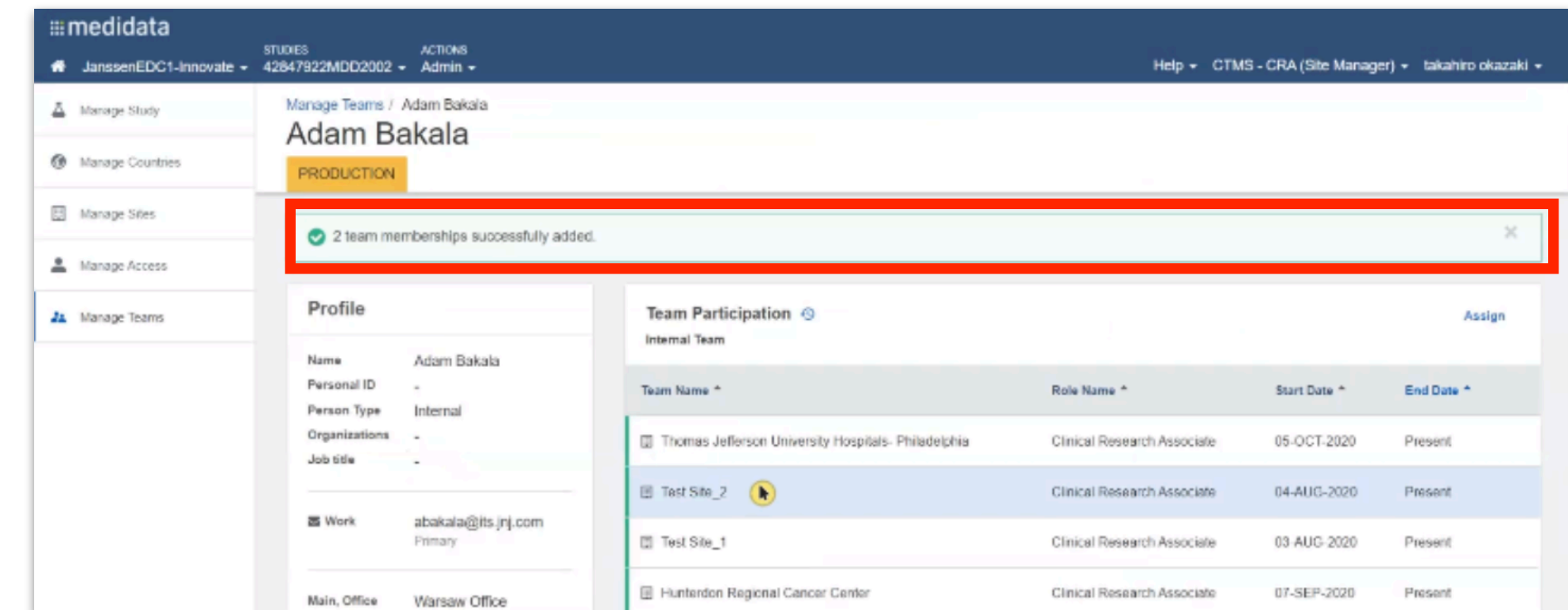
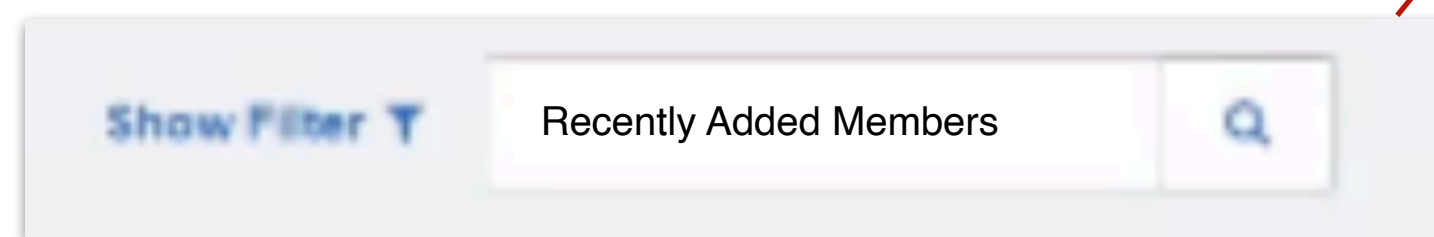
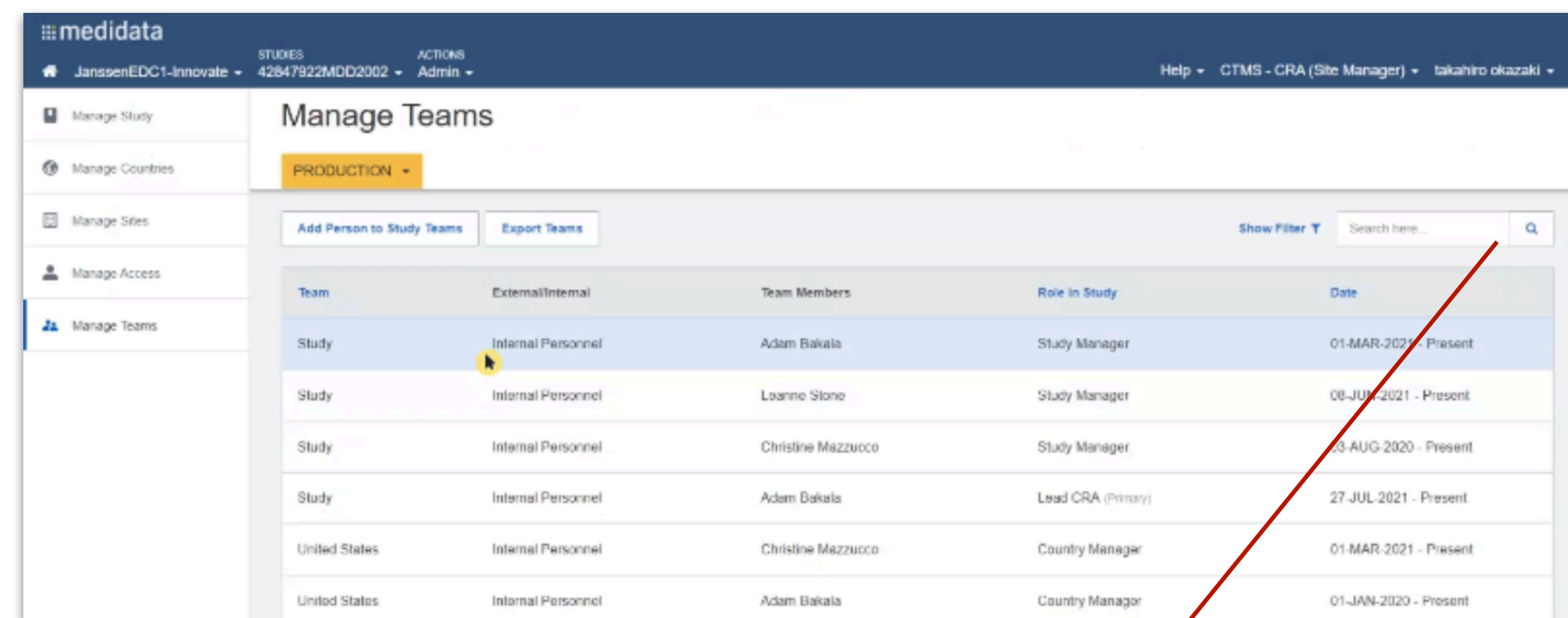


*Utilize a tabbed sub navigational pattern or loading a default screen instead of a drop-down*

# Study Management

## Recommendations

*Adding a filter to the list to display “Recently Added” will help users find the results they are after*



User's indicated they would like to be able to view “Recently Added” members to the study.

**It would be a good feature if I could find the member lists who were added to the study. Maybe it's available on the page but I wasn't very sure where to find it.**

# Monitoring Visit

**Site Management**



# Site Management - Monitoring Visit

## Task Summary

Testers: **SM, SM, SM, LTM**



# Site Management - Monitoring Visit

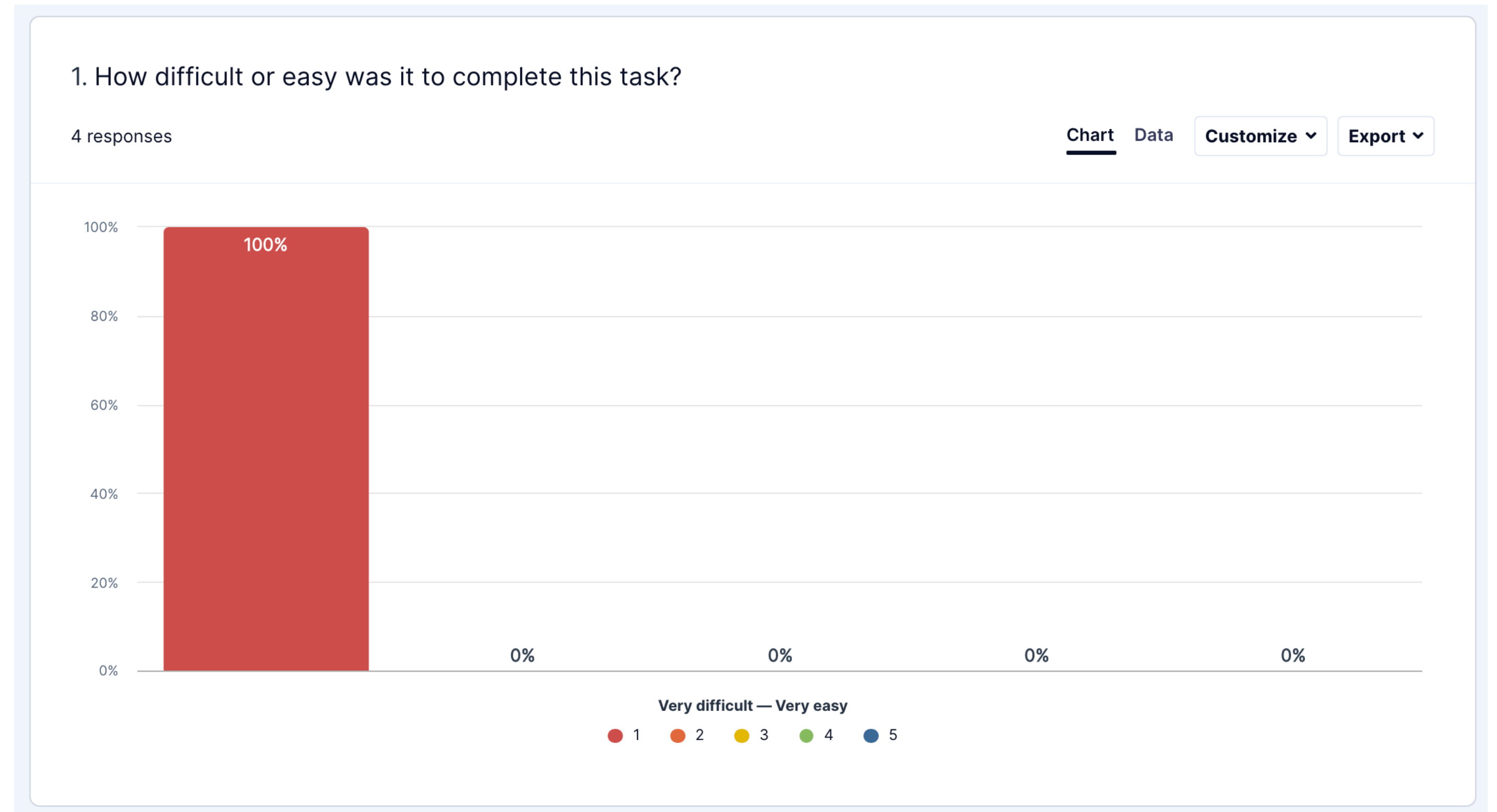
## Task 1 - Schedule the Monitoring Visit

### Scenario:

Imagine that you've been asked to Plan and schedule the monitoring visit.

### Create an MVR and submit a report for review

Information you may need to complete task:  
Use the JanssenEDC1-Innovate study group  
Country Code - USA  
Site Number - 1001



# Site Management - Monitoring Visit

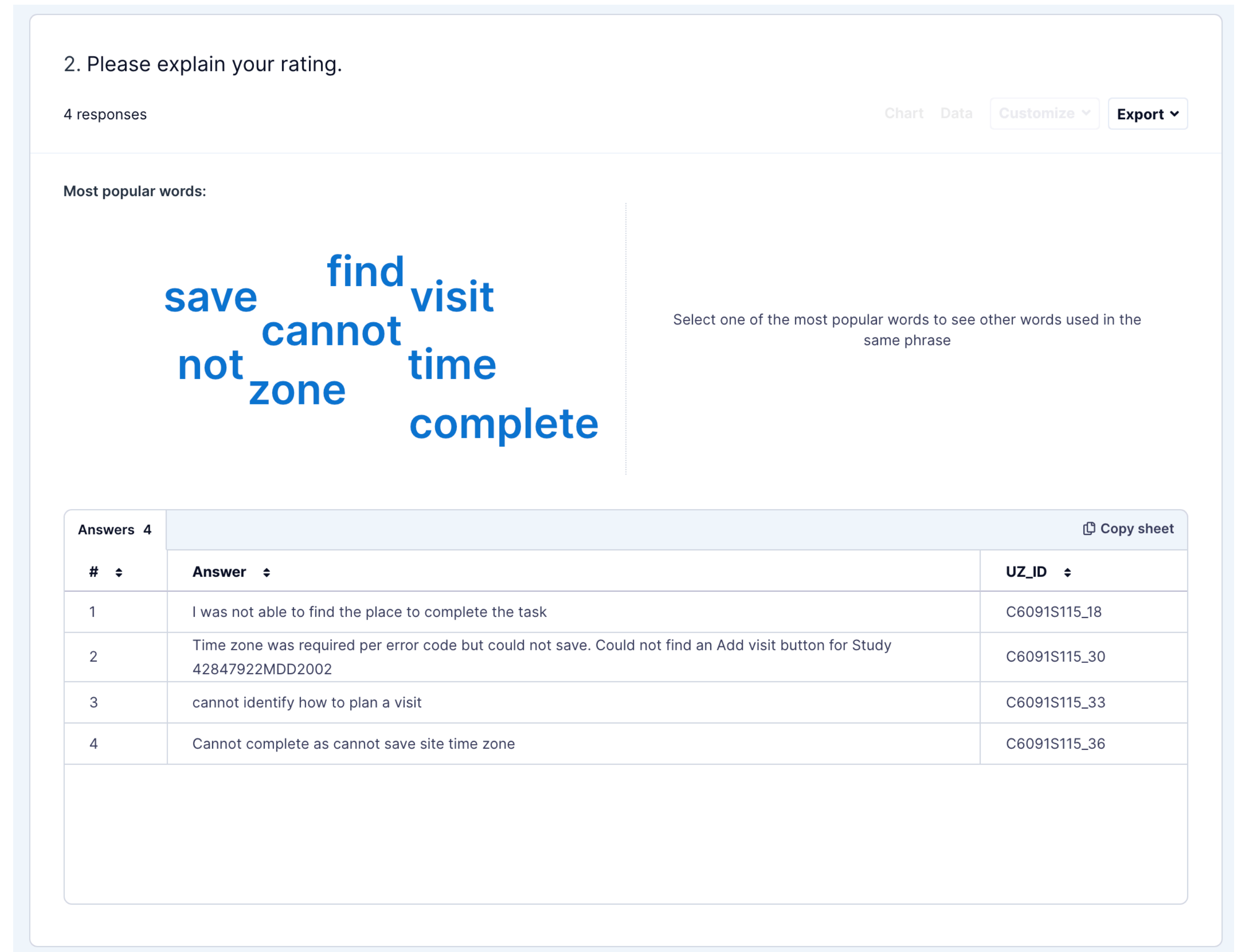
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### Scenario:

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# Site Management - Monitoring Visit

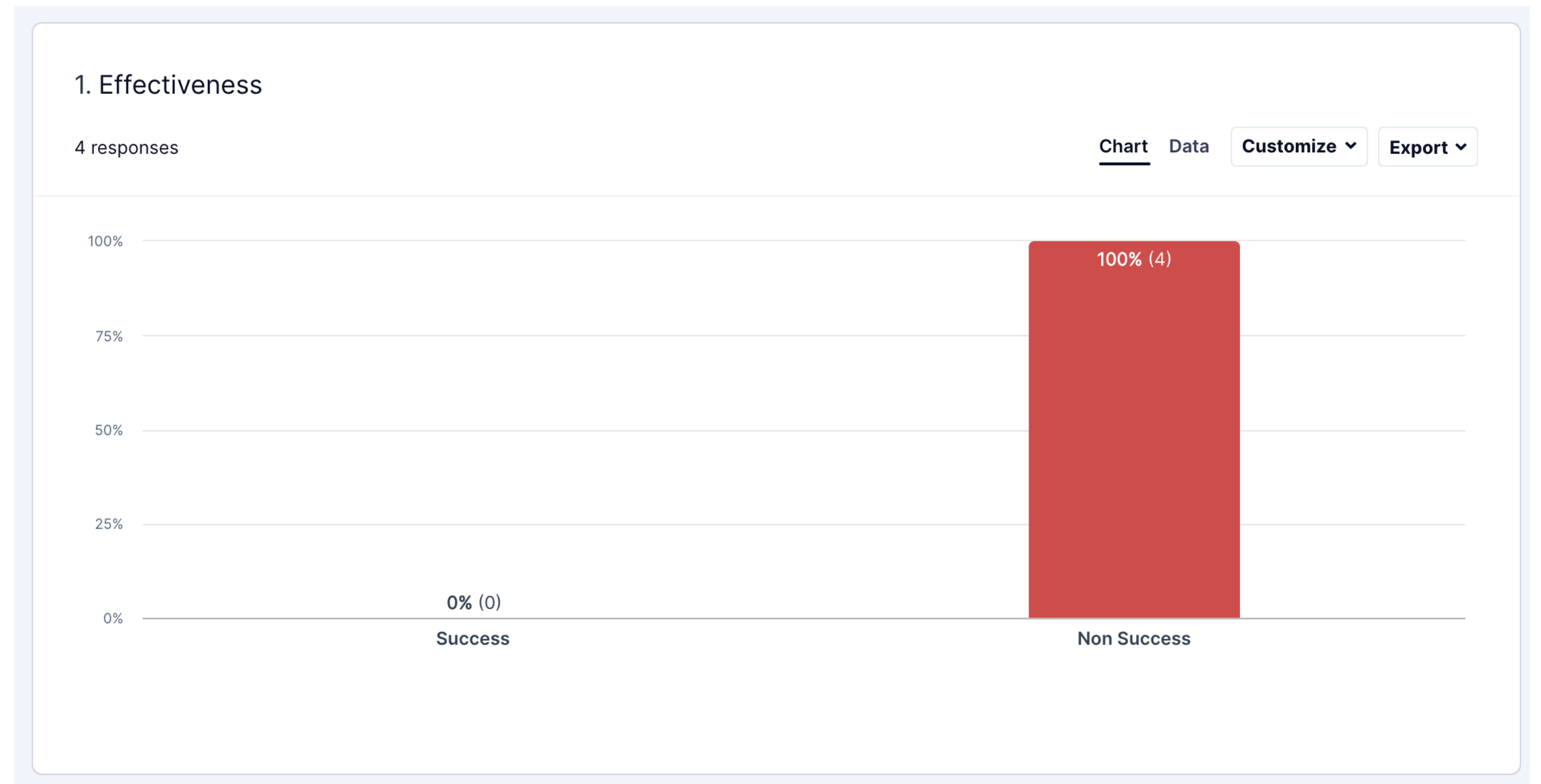
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# Site Management - Monitoring Visit

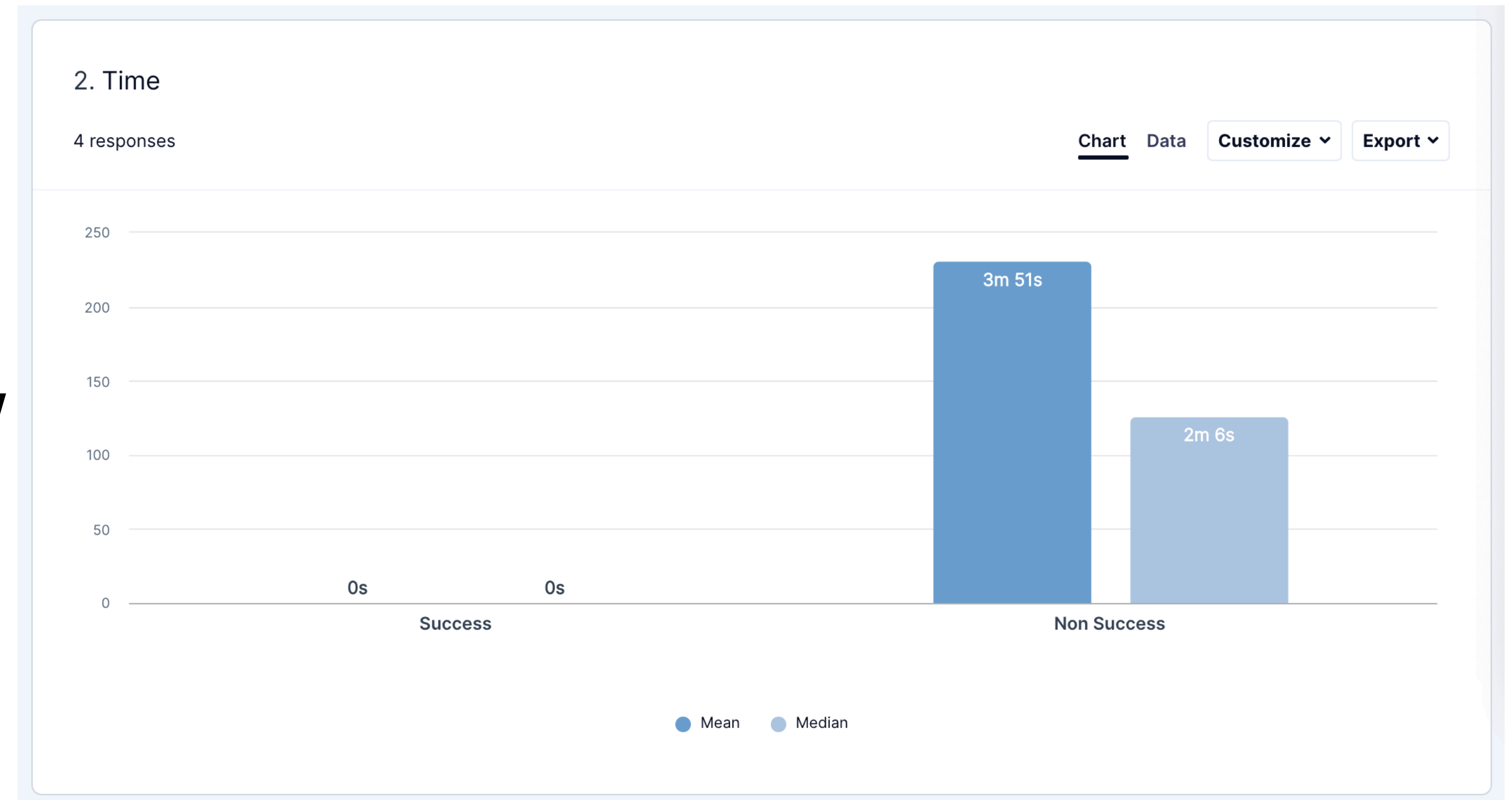
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# Site Management - Monitoring Visit

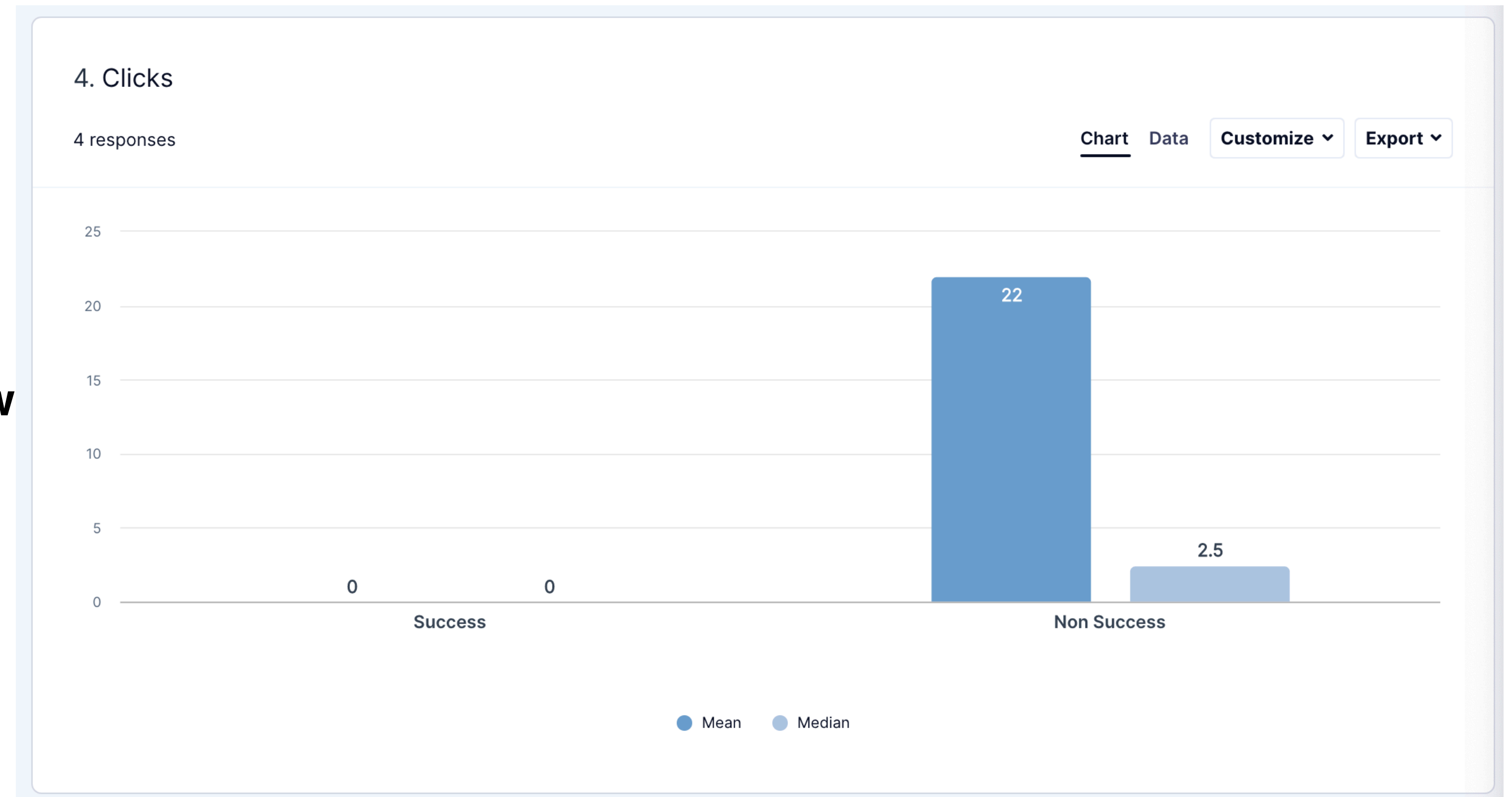
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# Site Management - Monitoring Visit

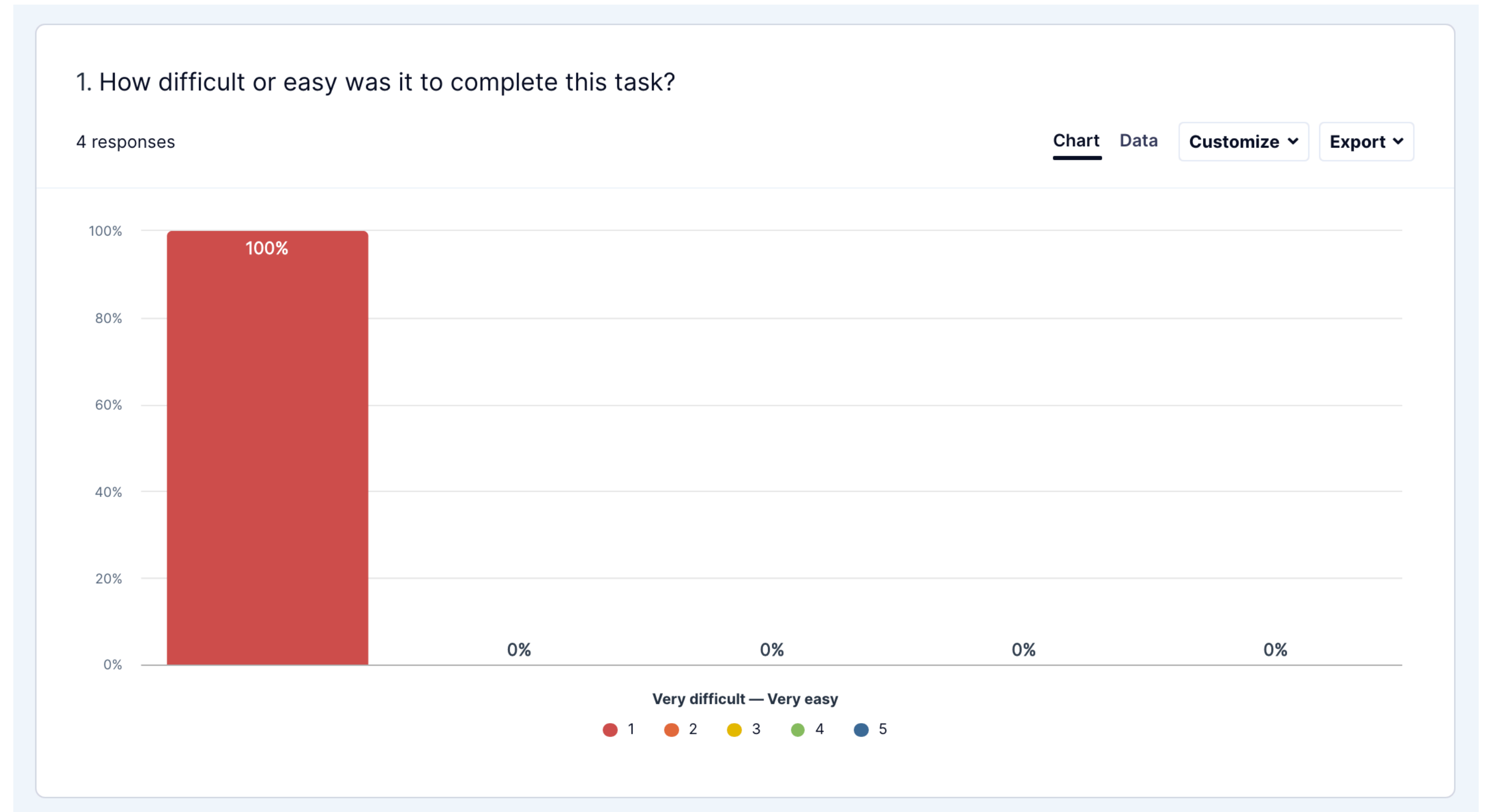
## Task 2 - Completion of Visit Report

### Scenario:

Imagine that you've been asked to Plan and schedule the monitoring visit.

### Create a Confirmation Letter

Information you may need to complete task:  
Use the JanssenEDC1-Innovate study group  
Country Code - USA  
Site Number - 1001



# Site Management - Monitoring Visit

## Task 2 - Completion of Visit Report

### Scenario:

Imagine that you've been asked to Plan and schedule the monitoring visit.

### Create a Confirmation Letter

Information you may need to complete task:  
Use the JanssenEDC1-Innovate study group  
Country Code - USA  
Site Number - 1001

2. Please explain your rating.

4 responses Chart Data Customize Export

Most popular words:

create not task letter

Select one of the most popular words to see other words used in the same phrase

Answers 4 <span>Copy sheet</span>		
#	Answer	UZ_ID
1	not able to find the field in the system to complete the task	C6091S115_18
2	Could not update time zone per error message to schedule a visit. could not create letter without scheduled visit.	C6091S115_30
3	Not an LTM task	C6091S115_33
4	Unable to create letter	C6091S115_36



# Site Management - Monitoring Visit

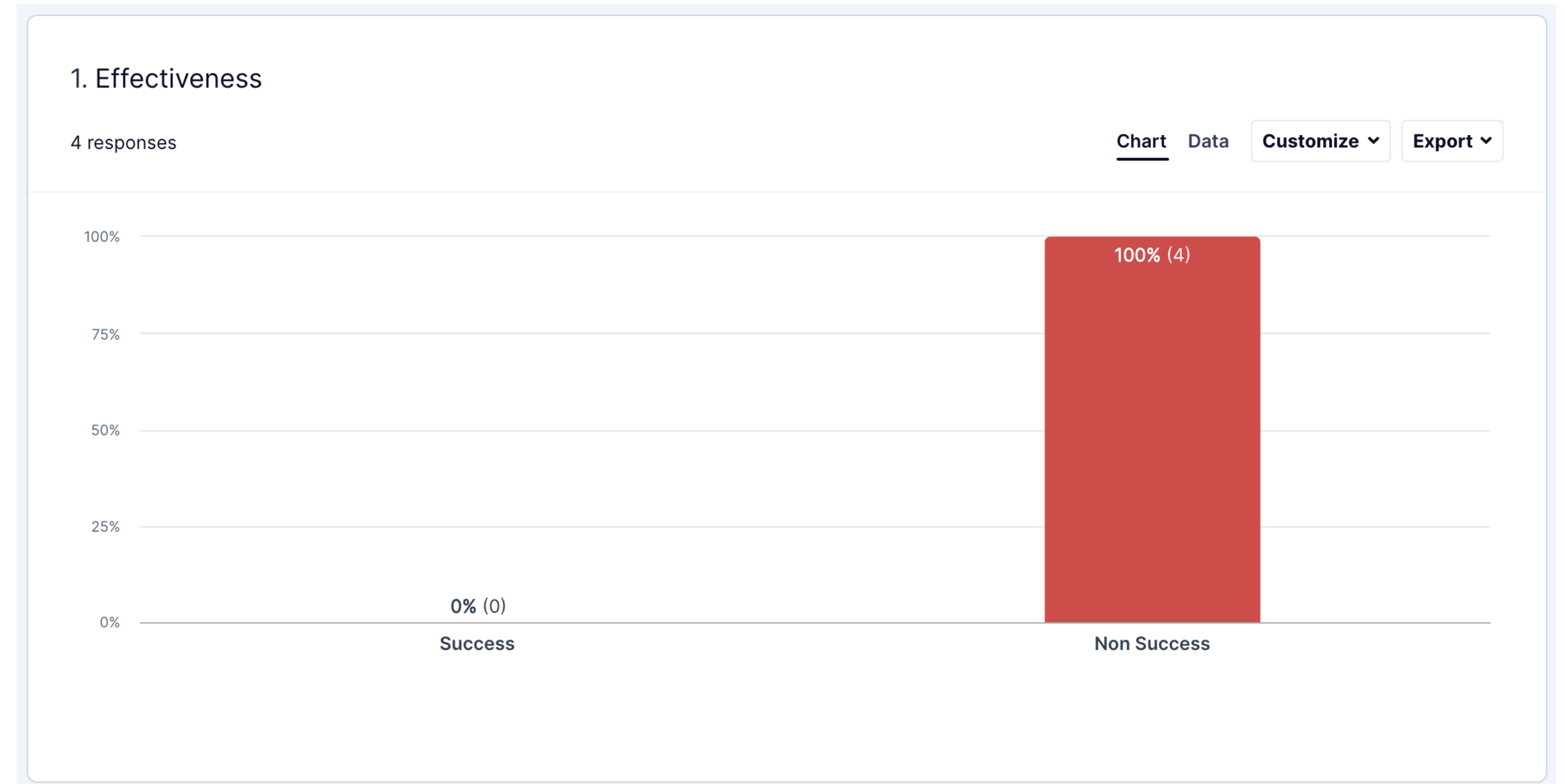
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# Site Management - Monitoring Visit

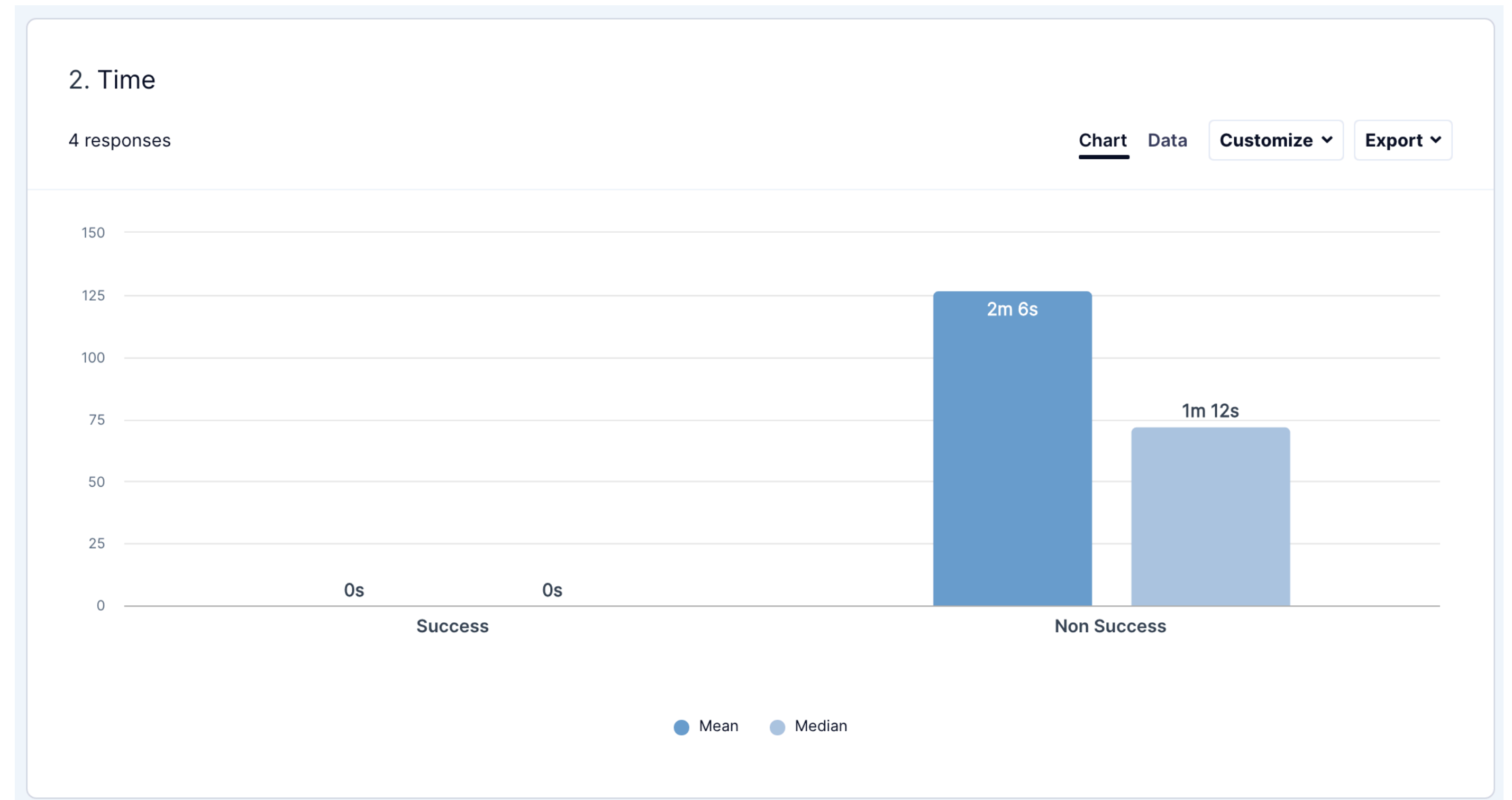
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# Site Management - Monitoring Visit

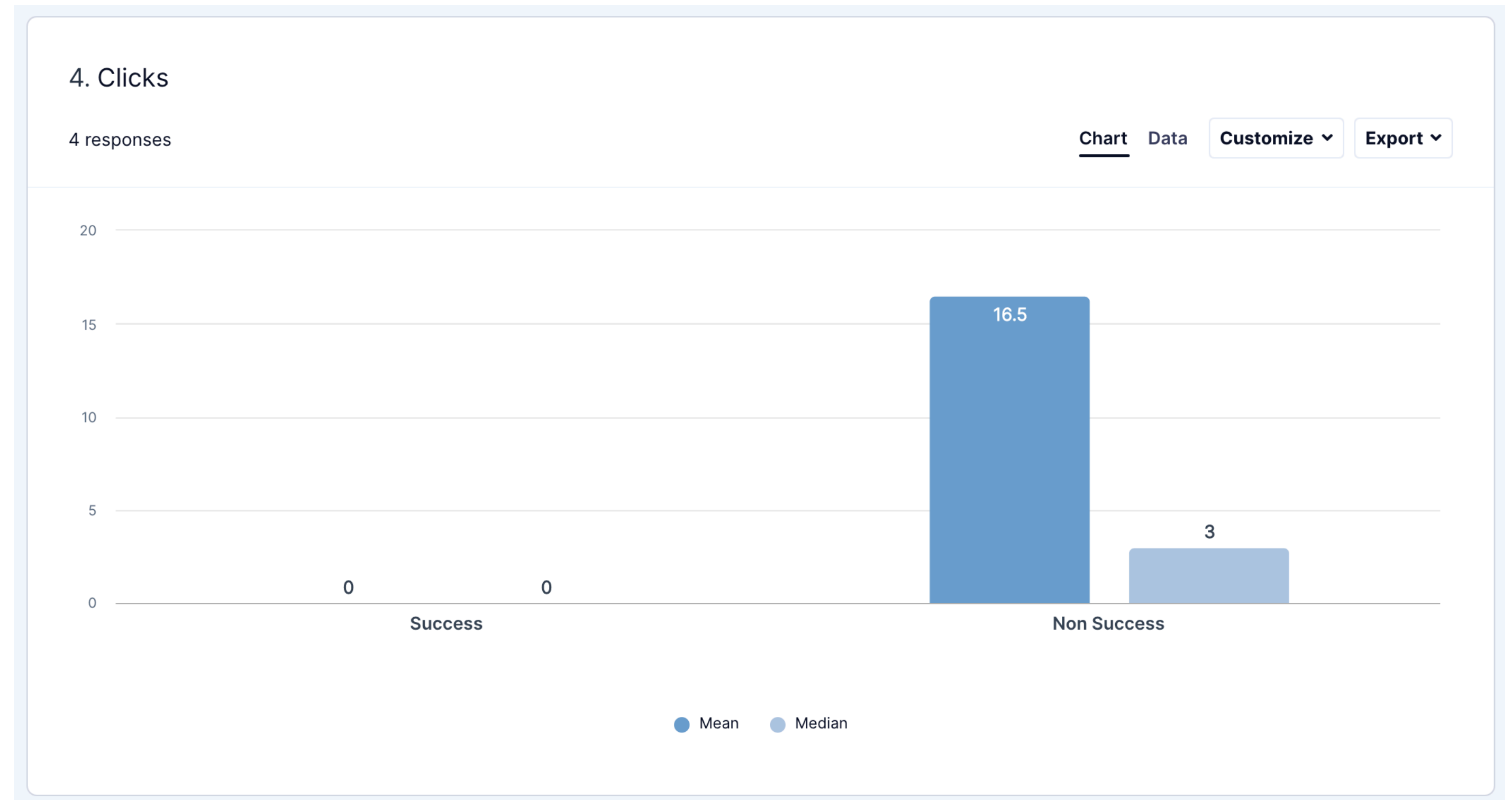
## Task 2 - Completion of Visit Report

### Scenario:

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### Create a Confirmation Letter

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Country Code - USA  
Site Number - 1001



# Site Management - Monitoring Visit

## Task 3 - Review of Visit Report

### Scenario:

Imagine that you've been asked to Plan and schedule the monitoring visit.

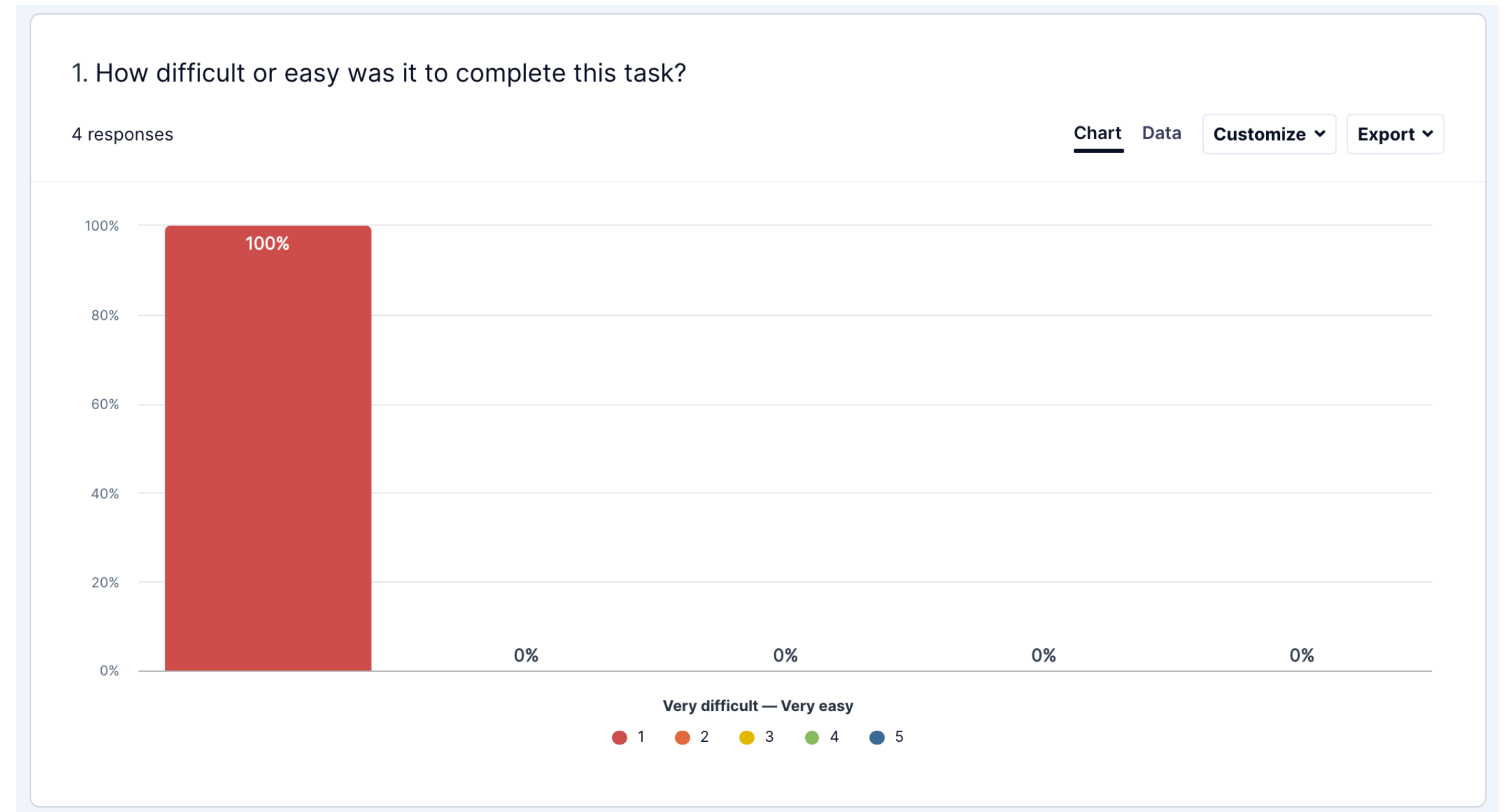
### Review and approve Visit Report

Information you may need to complete task:

Country Code - USA

Site Number – 1002

Confirmation Letter, VR and FU Letter should be created for site 1001



# Site Management - Monitoring Visit

## Task 3 - Review of Visit Report

### Scenario:

Imagine that you've been asked to Plan and schedule the monitoring visit.

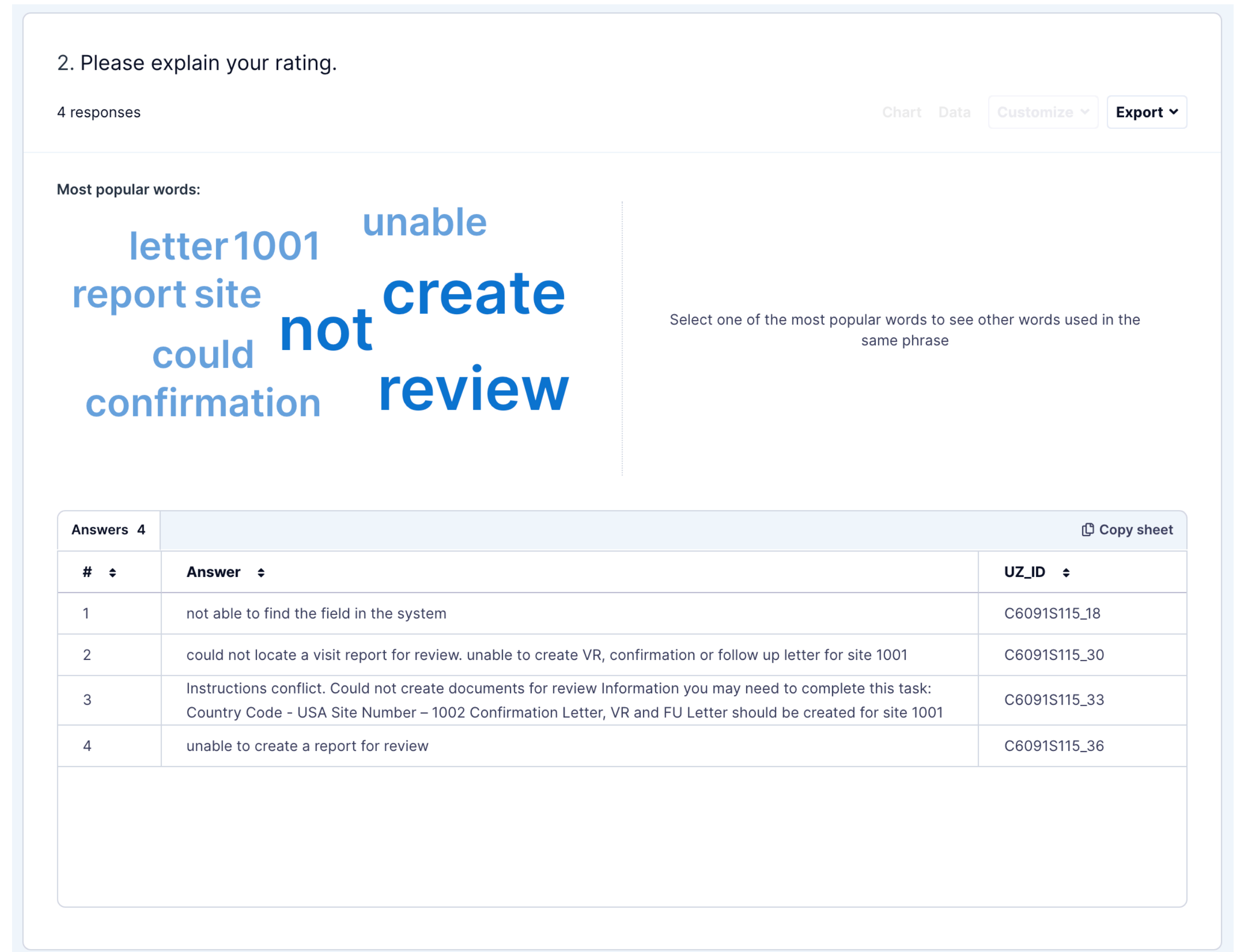
### Review and approve Visit Report

Information you may need to complete task:

Country Code - USA

Site Number – 1002

Confirmation Letter, VR and FU Letter should be created for site 1001



# Site Management - Monitoring Visit

## Task 3 - Review of Visit Report

### Scenario:

Imagine that you've been asked to Plan and schedule the monitoring visit.

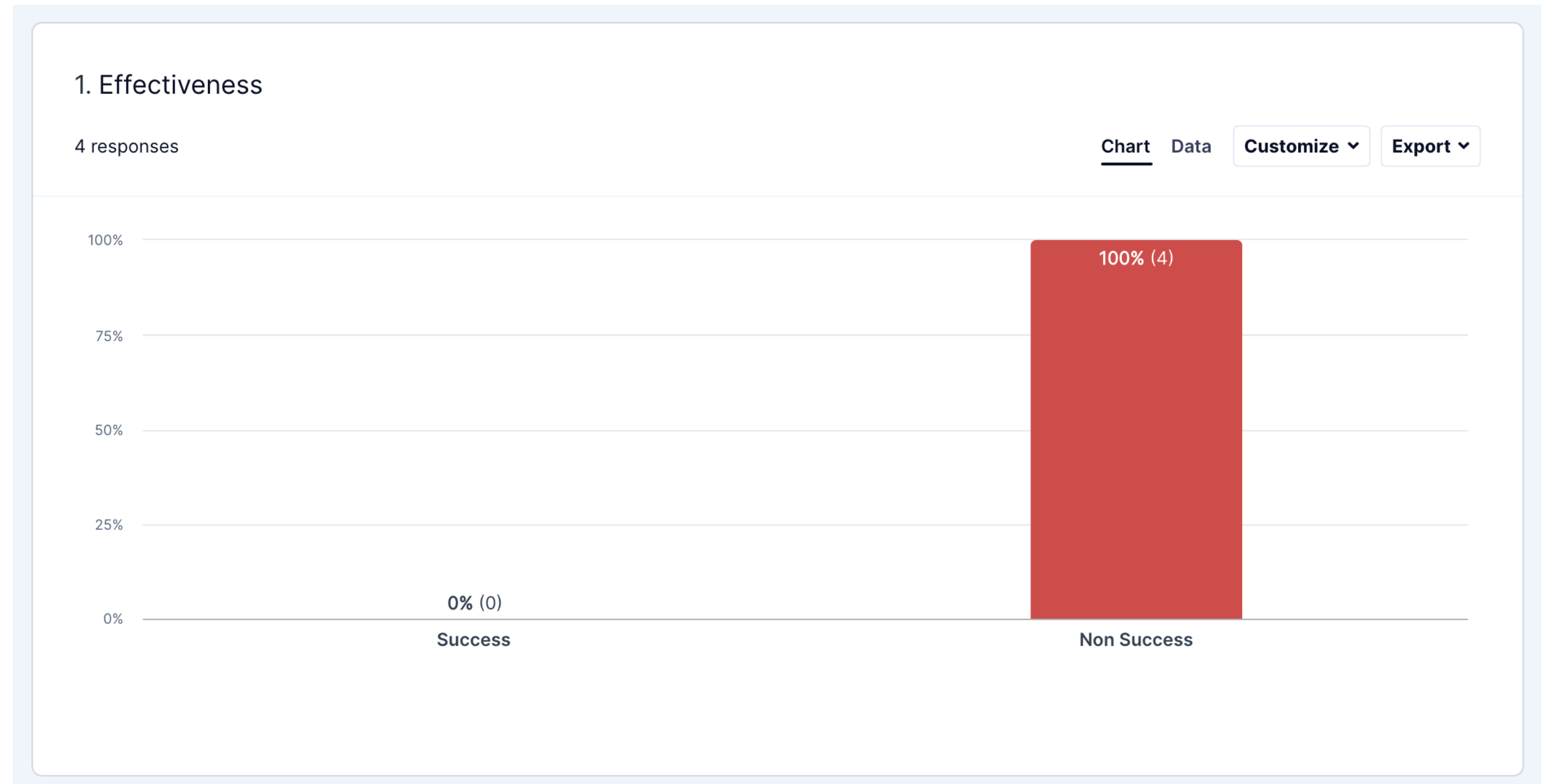
### Review and approve Visit Report

Information you may need to complete task:

Country Code - USA

Site Number – 1002

Confirmation Letter, VR and FU Letter should be created for site 1001



# Site Management - Monitoring Visit

## Task 3 - Review of Visit Report

### Scenario:

Imagine that you've been asked to Plan and schedule the monitoring visit.

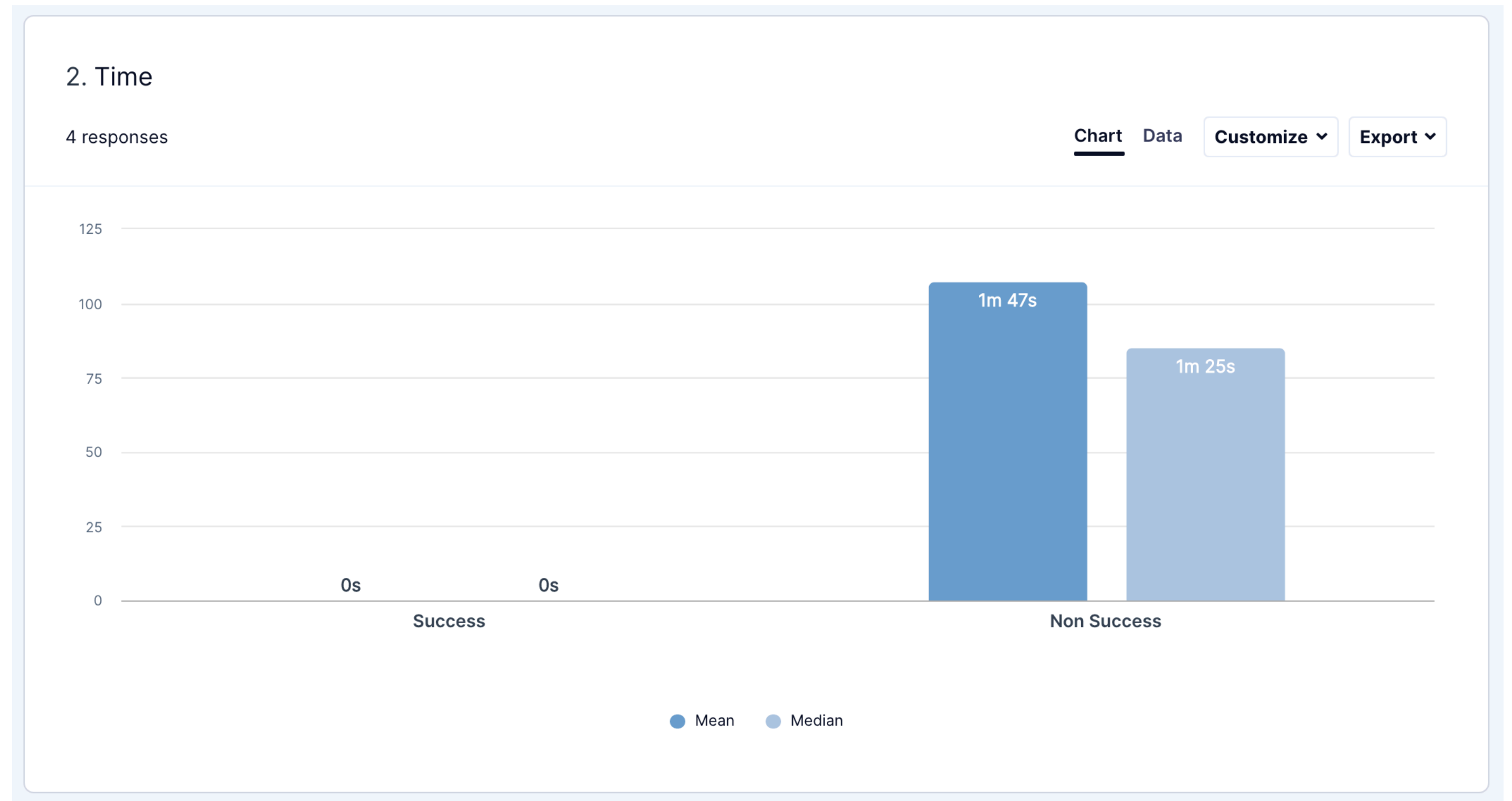
### Review and approve Visit Report

Information you may need to complete task:

Country Code - USA

Site Number – 1002

Confirmation Letter, VR and FU Letter should be created for site 1001



# Site Management - Monitoring Visit

## Task 3 - Review of Visit Report

### Scenario:

Imagine that you've been asked to Plan and schedule the monitoring visit.

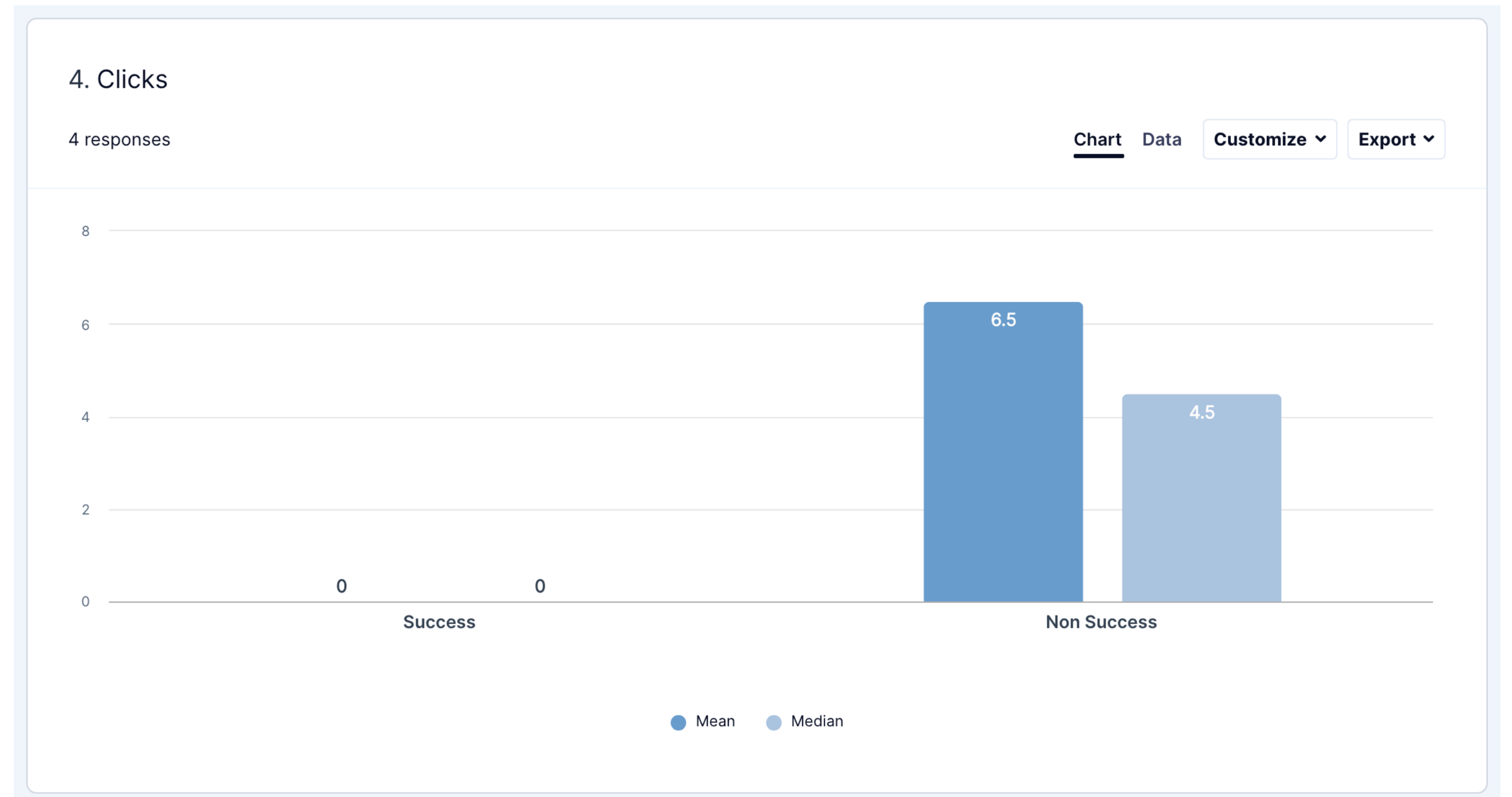
### Review and approve Visit Report

Information you may need to complete task:

Country Code - USA

Site Number – 1002

Confirmation Letter, VR and FU Letter should be created for site 1001





# Site Management - Monitoring Visit

## Quality of Experience (Qx) Score

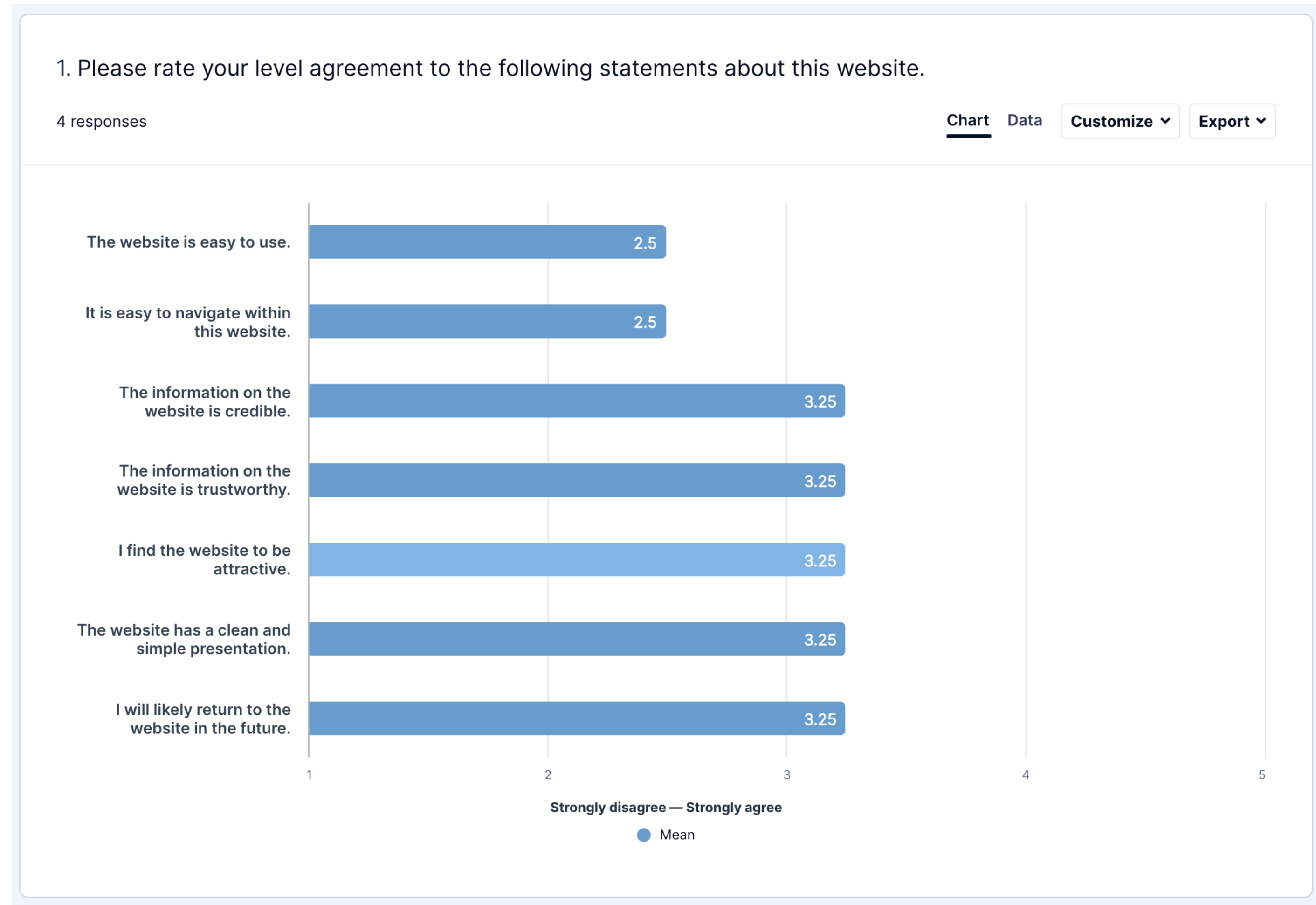
1 - Strongly Disagree

2 - Disagree

3 - Neutral

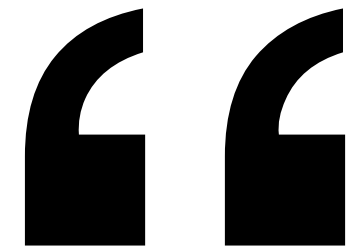
4 - Agree

5 - Strongly Agree



# Site Management - Monitoring Visit

What we heard



**I'm going to click on Site Monitoring.**

**Oh it's making me update the Timezone  
how do we find that.**

**It won't let me save the timezone.**

**Okay I met the site monitoring dashboard  
no items to display.**

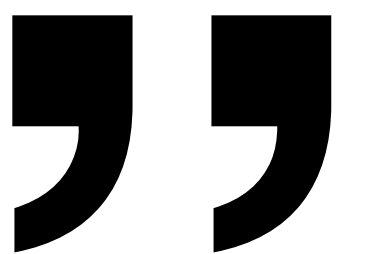
**I do not understand how to schedule a  
visit.**

**Click on my Protocol ID and click Visits.**

**Is there an FAQ section where I can read  
how to create a visit?**

**Not sure how to add a visit because my  
site does not come up on the list.**

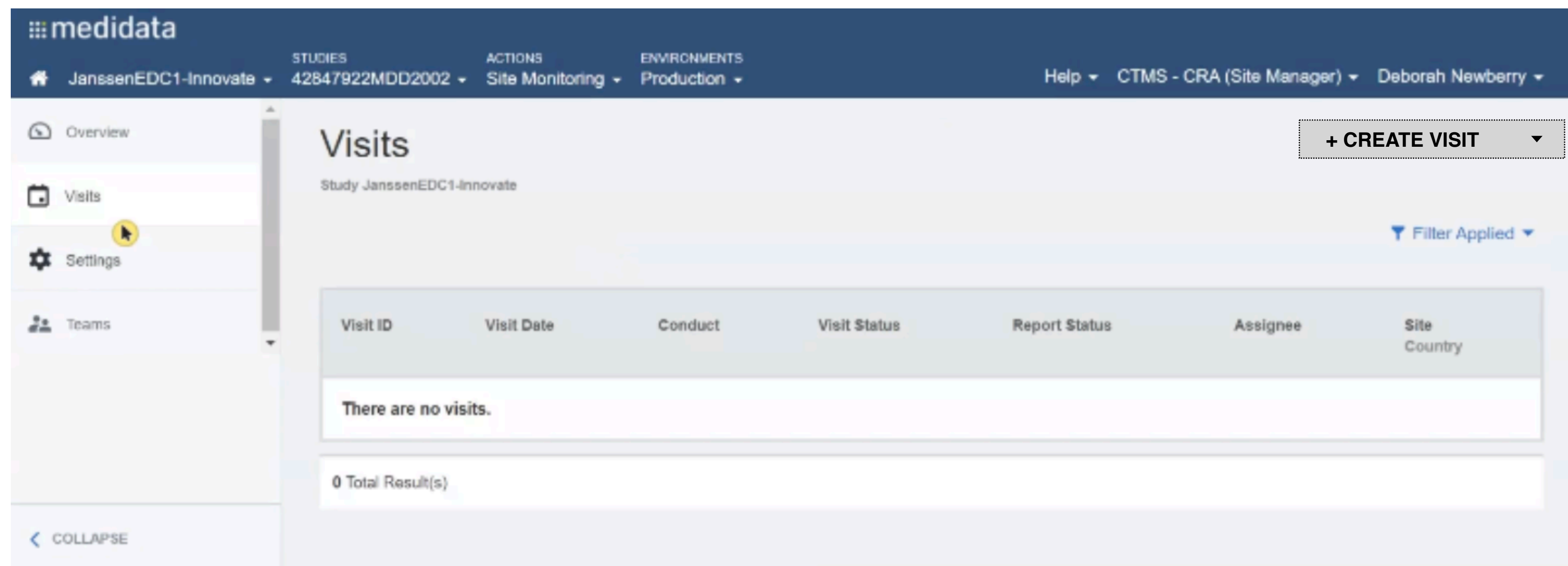
**It won't let me update the time zone.**



# Site Management - Monitoring Visit

## Recommendations

Navigating to the task area was confusing for some



“Maybe I can find the section for a confirmation letter creation, no overview under production, maybe production. No.”

“Not sure how to add a visit because my site does not come up on the list.”

+ CREATE VISIT

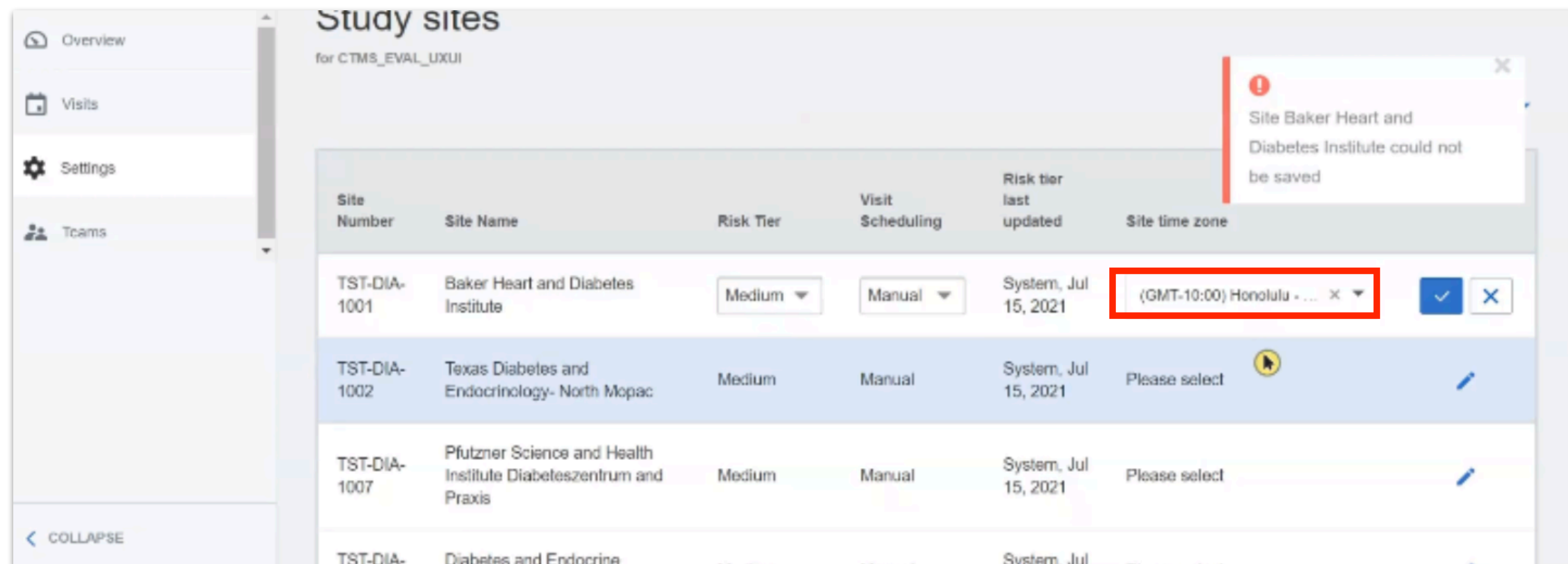
*Reorganizing some of the information architecture could help users to find what they're looking for more quickly.*

*Grouping relevant areas will reduce search time.*

# Site Management - Monitoring Visit

## Recommendations


“Study site settings maybe in there. Okay, click on the pencil. Please select time zone. Oh here we go.”



After locating the task area, the users were unable to complete the task.

*Backend error notification when user attempts to save the changes and complete the task.*

# Thanks for reading!

Made w  @

  
DESIGN