

Post Service Claims Desktop Procedures

Contextual Interview - Final Report

Contextual Interview Report

Post Service Claims – Desktop Procedure Manual

Facilitator(s): Rebecca Destello

Date(s): April 22 – 27, 2010

Participant(s): Claims Processor I
Claims Processor I
Claims Processor I
Claims Processor I
Claims Processer II
Claims Processor II
Claims Adjuster
Claims Adjuster

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The purpose of this report is to assess the Post Service Claims, Desktop Procedure Manual contextual interview findings and provide recommendations.

Objectives

The primary goal of this study is to determine if the needs of the user are being met, detect issues they may encounter, and understand the current state of the web site.

Participant Profile

Participants for this study represent typical users of the Post Service Claims site. 8 participants were identified for this usability study:

- All participants participate in a variety of Claims processing tasks and posses varied levels of experience
- Two participants who have been in their positions for less than 1 year

Location

All participants were observed at their desks.

Observation Notes

Participants were observed for a period of 4 hours each while they processed/analyzed a variety of claim types. Notes were taken in order to document the tools participants used to complete their jobs, and to note comments made during the study. In some cases, pictures were taken of some of the participant desks (see Appendix).

Participant Comments

Overall participant feedback was that the Post Service Claims Desktop Procedure manual was well organized, but the information provided was sometimes out of date, inconsistent, or poorly articulated.

In some cases, participants complained about procedural steps that took them through a loop, without a final resolution.

The following are samples of participant comments,

“Searching through the Intake Log is the most time consuming thing.”

“Communication about changes doesn’t come far enough down the line.”

“Instructions don’t tell you what screen it’s on, and I have to search for it.”

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“Why don’t the Line Expansion edit messages have resolutions along with the description?”

“There seems to be a lot of patches [for problems] rather than just fixing them.”

“You can keep going and going in a loop when you should have stopped a while ago.”
(pertains to steps found within online procedures)

“Ugh, staples!” (pertains to the amount of staples used in claim hardcopy information)

Participant Job Tools

Participants used the following tools to complete their jobs.

Accessed via computer

- IBM – average is 5 screens
- Outlook
- Code Correct
- Post Service Claims web site pages (mostly accessed via bookmarks)
- eWatson
- FileNet
- Care Tracker
- Access database for technical assistance requests
- Zip Express

Desktop

- Printed HQ Status page from web site
- How to Pay to the Higher Allowed
- Reprocessing Reason Codes
- Split year info
- List of IBM screen types
- Overrides

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Recommendations

Critical (problematic for most users, or does not meet industry standards) = ↑

Recommended (could be a problem for some users) = ⇄

↑ Based on findings from the field study, the study facilitators recommend the following actions:

↑ Reorganize the “How to Documents” into an Index that better matches what users are looking for.

For example: users look for “COB Questionnaire” not “Send a COB Questionnaire.” In the current state, the alphabetical organization by action is not relative to the object being searched. Change instead to: “COB Questionnaire, Send a” and re-alphabetize accordingly.

↑ When writing procedural documentation, include the screen number in which the step is located. Users are having to keep notes about screens at their desks.

↑ Add resolutions to the Line Expansion edit messages table.

⇄ Check for clarity, accuracy, and needed updates in current documentation.

⇄ Consider updating team sites to be more dynamic. Include information that lists information on that day’s work, most used links per team, and important communication.

⇄ Consider the flow of how communication is relayed to team members via the web, and how to make it more efficient.

⇄ Consider a more efficient way to communicate documentation changes. Most participants complained that they are too busy to check for updates.

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2008 vs. 2010 HPO Survey Results

Q1 How often do you reference online documentation to process a claim?

	2008	2010	Change	+/-
81-100%	61%	64%	3%	+
61-80%	16%			
41-60%	3%	17%	14%	+
21-40%	5%	6%	1%	+
0-20%	15%	12%	-3%	-

Q2 What else do you reference to process a claim? Check all that apply.

	2008	2010	Change	+/-
None	5%	12%	7%	+
Cheat Sheets	35%	29%	-6%	-
Check Lists	19%	15%	-4%	-
Email	54%	47%	-7%	-
Job Aids	55%	53%	-2%	-
Job Breakdowns	70%	62%	-8%	-
Memos	27%	20%	-7%	-
Printed Documents	53%	27%	-27%	-
Sticky Notes	31%	24%	-8%	-
Verbal Instruction	61%	38%	-23%	-

Q3 Do you know when updates are made to online documentation?

	2008	2010	Change	+/-
Yes	87%	90%	3%	+
No	13%	10%	-3%	-

Q4 Have you received training on how to use online documentation?

	2008	2010	Change	+/-
Yes	76%	68%	-8%	-
No	24%	32%	8%	+

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2010 HPO Survey Results - Sample size: 98

RespondentID	What is your work unit? (If you work for more than one team, select the team where you do the most work)	Other (please specify)	How often do you reference online documentation to process a claim?	What else do you reference to process a claim? (Check all that apply)	Cheat Sheets	Check Lists	Email	Job Aids	Job Breakdowns	Memos	Printed Documents	Sticky Notes	Verbal Instruction	Other (please specify)	Do you know when updates are made to online documentation?	How do you find out about updates made to documentation?	I ask someone.	I hear about it in the daily huddle.	I get an email.	I check the "Updates" page online.	I don't know how to find out about updates.	Have you received training on how to use online documentation?	Is there anything you'd like to tell the Post Service Claims web developer?
1056137760	CIM		41-60%		x	x	x		x	x		x	x		Yes				x			No	n/a
1055638822	CIM		41-60%		x		x		x	x	x	x	x		Yes				x			Yes	
1061795146	CIM		81-100%			x	x	x	x	x	x		x		Yes				x			Yes	
1055638982	COB		0-20%	None											Yes				x			Yes	I don't process claims but I use the documentation a lot.
1055647543	COB		81-100%				x	x	x						Yes				x			Yes	Is there any way we can incorporate colors into our documents online? We have found that color coding instructions has made the processing a lot easier for staff but when the doc goes online there is no more color and it slows them down a little. The color is visual and quick. This would be awesome to have. :O) Thank you.
1057420391	COB		81-100%		x				x		x		x		Yes				x			Yes	no
1055890068	COB		41-60%		x	x		x	x		x		x		Yes			x	x	x		Yes	
1062862451	COB		81-100%						x	x		x			Yes			x	x	x		No	
1055643321	COB		81-100%					x							Yes	Someone tells me a change has been made.		x	x	x		Yes	
1063184455	COB		81-100%				x	x	x						Yes				x	x		Yes	

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1063110840	COB		41-60%					x	x				x		Yes	Someone tells me a change has been made.		x	x			Yes	
1062884715	COB		81-100%					x	x		x				Yes			x	x			Yes	
1062861491	COB		81-100%		x		x	x	x			x	x		Yes				x			Yes	
1055638148	COB		41-60%				x		x						Yes				x			No	
1055638800	COST		0-20%	None											No		x					No	I don't process claims
1055677893	COST		81-100%	None											Yes				x			No	In regards to #6, I don't think I need training on how to read online documentation. Also-I feel the documentation update process needs PDCA. People making changes and approving those changes do not always have the knowledge to approve/disapprove updates. We have had issues where things are changed in the documentation that should not have been. Often the right people are not attending the DRT meetings for the processes being reviewed.
1055638118	COST		81-100%					x							Yes					x		Yes	

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1055703966	HMO		81-100%		x		x	x	x				x	Common sense, memory.	Yes				x	x		Yes	DOC's are nice to have, but some are too complicated and some I am unable to find when I really need to use it. We should have an easier way to find them when we need them. If we have to search too much it takes too much time.
1057702943	HMO		81-100%		x		x		x	x		x			Yes				x	x		Yes	Give us back our Search bar on the documents page. It is a hassle to constantly go out to incontext to do a search.
1055641822	HMO		81-100%						x						Yes					x		Yes	I love it when the document has if and then BLOCKS. It makes it so much easier to find what you need and keeps me from missing something that might be important.
1062890587	HMO		81-100%		x		x	x					x		Yes				x			Yes	It would be nice to have all the info for a specialty in one doc. It is frustrating to have to go to a referral doc than a desk proc doc and etc.
1055955206	HMO		81-100%		x	x	x	x	x	x		x	x		Yes			x	x	x		Yes	
1055640368	HMO		41-60%				x	x	x	x	x		x		Yes			x	x	x		Yes	
1062100263	HMO		81-100%					x	x	x			x		Yes			x	x	x		Yes	
1063193262	HMO		41-60%				x	x	x				x	Experience, etc.	Yes	Someone tells me a change has been made.		x	x	x		Yes	

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1056029135	HMO		81-100%		x			x	x				x		Yes			x	x	x		Yes	
1062605613	HMO		81-100%				x	x	x						Yes			x	x	x		Yes	
1055639517	HMO		81-100%			x	x		x		x				Yes				x	x		Yes	
1055782634	HMO		81-100%				x	x	x						Yes				x	x		Yes	
1055642577	HMO		21-40%				x	x	x						Yes	Someone tells me a change has been made.				x	x	Yes	
1055653891	HMO		81-100%	None											Yes				x	x		Yes	
1057252605	HMO		81-100%				x	x	x				x		Yes					x		Yes	
1055643567	HMO		81-100%				x								Yes					x		No	
1055642368	HMO		81-100%	None											Yes	Someone tells me a change has been made.	x	x	x			No	
1055658933	HMO		81-100%					x							Yes			x	x			Yes	
1056141826	HMO		0-20%	None											Yes	Someone tells me a change has been made.		x	x			No	
1055720504	HMO		41-60%		x				x	x	x	x			Yes				x			Yes	
1062867978	HMO		81-100%				x						x		Yes			x				No	
1055641304	HMO		81-100%						x		x				Yes			x				No	
1062953389	HMO		41-60%					x	x						No			x				No	

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1055783787	Intake		41-60%		x			x	x	x	x	x	x		Yes			x	x	x		No	I don't think this pertains to you but -I'll ask away -the intake log isn't always upto date or well monitored -as to old things that could be deleted when the more upto date info is added -if they deleted the things that have been updated I think we would have less error . Some have info from 2008 -that doesn't pertain to the provider today. Some have had 40-50 or more info noted -it takes time to read all the things that don't apply to find one that does apply ..So hope I didn't get carried away and off the track ..If you could help w/this it would be great -if not we'll just keep reading .. :O)
1056212661	Intake		0-20%										x		Yes			x	x	x		No	I work strictly in the mailroom but try to read emails relatingto changes in documentation pertainingto Intake...fmi..so to speak
1055639446	Intake		0-20%					x							Yes	Someone tells me a change has been made.		x	x	x		No	Nope

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1055659817	Intake		21-40%		x		x	x							No						x	No	NOT AT THIS TIME
1062706998	Intake		81-100%	None											Yes					x		Yes	
1064575277	Intake		81-100%		x				x	x	x	x	x		No	Someone tells me a change has been made.		x	x			No	
1055641166	Intake		81-100%		x		x	x		x	x		x	Various IBM screens	No	Someone tells me a change has been made.		x	x			Yes	
1055638721	Intake		81-100%		x	x			x		x		x		Yes			x	x			Yes	
1055644242	Intake		21-40%	None											Yes				x			Yes	
1059125199	Intake		0-20%		x			x			x	x	x		No			x				Yes	
1062876826	IRA		81-100%										x		Yes				x			Yes	I like that we get the post-service update email weekly. That keeps me in the loop of the changes. I don't process claims on a daily basis so the weekly updates are great.
1055792522	IRA		81-100%		x	x	x	x	x	x	x	x	x		Yes				x			No	
1057796095	IRA		21-40%	None											Yes				x			Yes	
1055720735	Medicare		81-100%											Post Service Referral documents and Pre-service documentation	Yes					x		Yes	I am a referral tech support for claims processors. I do not process claims.
1055772555	Medicare		81-100%					x	x					Other GH Web Pages for program requirements and policies	Yes	Someone tells me a change has been made.		x		x		Yes	I do not like the search engine, which previously enabled me to search with a specific department on InContext; without taking me to a list of suggested topics.

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1064485540	Medicare		81-100%				x	x	x		x		x		Yes			x	x	x		No	No
1062967954	Medicare		81-100%				x		x						Yes					x		Yes	none
1055718217	Medicare		81-100%					x	x			x			Yes				x			Yes	Nothing at this time.
1056048645	Medicare		81-100%		x	x	x	x	x	x		x	x		Yes	Someone tells me a change has been made.	x	x	x	x		Yes	
1055658525	Medicare		81-100%			x	x	x	x	x	x	x	x		Yes	Someone tells me a change has been made.		x	x	x		Yes	
1056148604	Medicare		81-100%									x			Yes			x	x	x		Yes	
1055639106	Medicare		81-100%				x	x	x	x					Yes				x	x		Yes	
1055666506	Medicare		81-100%		x		x		x			x	x	tech support data base	Yes			x	x			Yes	
1055661552	Medicare		81-100%				x							excel and word documents	Yes			x	x			Yes	
1055639027	Medicare		81-100%				x		x						Yes				x			Yes	
1055967135	Medicare		0-20%			x		x	x						No	Someone tells me a change has been made.		x				Yes	
1055942560	OPL		21-40%					x	x		x				Yes				x			Yes	Nothing at this time
1055642003	OPL		0-20%				x	x	x				x	OPL ANALYST PROCEDURES	Yes	Someone tells me a change has been made.		x	x			Yes	
1062861735	OPL		41-60%					x	x						Yes			x	x			No	
1055786809	OPL		0-20%		x			x	x		x		x		Yes				x			No	
1055645276	OPL		81-100%					x	x		x			leads help	Yes				x			No	
1055674449	OPL		0-20%						x						Yes			x				Yes	

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1055922288	Other (please specify)	n/a	81-100%										x		Yes				x			No	It'd be SO much easier if documentation was written in an "if, then" format. I spend a lot of time reading documentation and taking my own notes to create my own if, then statements so I can easily and quickly know the correct steps. So even if you added that to existing documentation it would be a great time saver.
1055763595	Other (please specify)	HMO & POS	81-100%											action decision logs	Yes			x	x	x		No	we'd like the page search function back.
1055682629	Other (please specify)	CFR	81-100%				x	x	x						Yes				x	x		Yes	
1057366163	Other (please specify)	CFR	81-100%	None											Yes				x	x		No	
1055641344	Other (please specify)	PSAU	41-60%				x		x		x				No					x		No	
1055640069	Other (please specify)	Closed File Reveiw	81-100%	None											Yes					x		Yes	
1055656404	Other (please specify)	PAU	41-60%				x					x			No		x		x			Yes	

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1057701292	Other (please specify)	RAU	41-60%						x				x		Yes				x			No	
1055639217	Other (please specify)	CFR	81-100%			x	x	x	x	x					Yes				x			No	
1055642910	Other (please specify)	VM and COB	81-100%		x		x								Yes				x			Yes	
1055688345	Other (please specify)	CFR	41-60%											Policy's and contracts	Yes				x			Yes	
1055674306	Other (please specify)	CFR	0-20%		x		x	x	x						No	Someone tells me a change has been made.		x				Yes	
1055649989	POS		81-100%		x				x		x				Yes				x			Yes	create sort of a "keyword index" where if you don't remember exactly what the documentation is listen as, maybe a keyword might bring it up.
1062898933	POS		81-100%				x	x			x				Yes				x			No	Pls make it simple, brief & user friendly.
1055679304	POS		81-100%				x	x	x	x	x	x	x		Yes	Someone tells me a change has been made.	x	x	x	x		Yes	
1055717220	POS		41-60%				x			x	x	x	x		Yes				x	x	x	Yes	
1062862417	POS		21-40%	None											Yes				x	x	x	Yes	
1055641322	POS		0-20%						x						Yes				x	x		Yes	
1055966540	POS		81-100%		x		x						x		Yes				x		x	Yes	

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1056253461	POS		81-100%		x	x		x				x			Yes	Someone tells me a change has been made.	x	x	x			Yes	
1055646287	POS		81-100%			x	x	x	x			x	x		Yes			x	x			No	
1055639395	POS		41-60%		x	x	x	x				x			Yes	Someone tells me a change has been made.		x	x			Yes	
1055946057	POS		81-100%					x	x						Yes			x	x			Yes	
1055640071	POS		81-100%		x	x	x	x	x		x		x		Yes				x			Yes	
1056281853	POS		81-100%				x	x	x	x		x			Yes				x			No	
1056021911	POS		81-100%					x	x						Yes				x			No	

Post Service Claims Desktop Procedures Contextual Interview - Final Report

User Work Areas



Figure 1 - Experienced claims adjuster. Inefficient use of screens and notes for navigation and processing claims.

Post Service Claims Desktop Procedures

Contextual Interview - Final Report

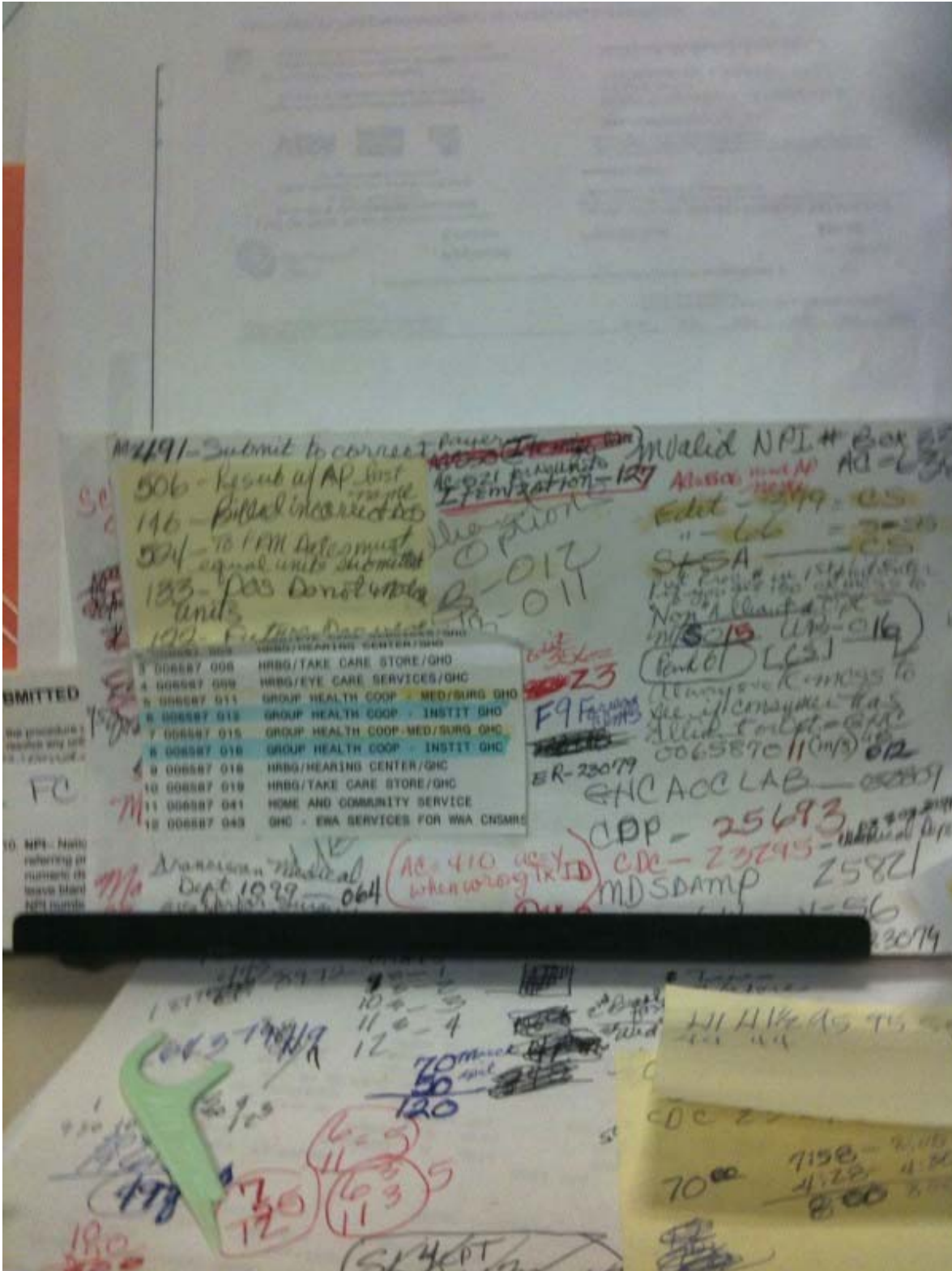


Figure 2 - Experienced claims processor desktop notes, used to navigate screens and processing claims.

Post Service Claims Desktop Procedures

Contextual Interview - Final Report



Figure 3 - Experienced claims processor II desktop. Some notes – efficient use of screens.

Post Service Claims Desktop Procedures

Contextual Interview - Final Report



Figure 4 – New claims processor II desktop. Efficient use of screens, no sticky notes or other note paper.

Post Service Claims Desktop Procedures Contextual Interview - Final Report

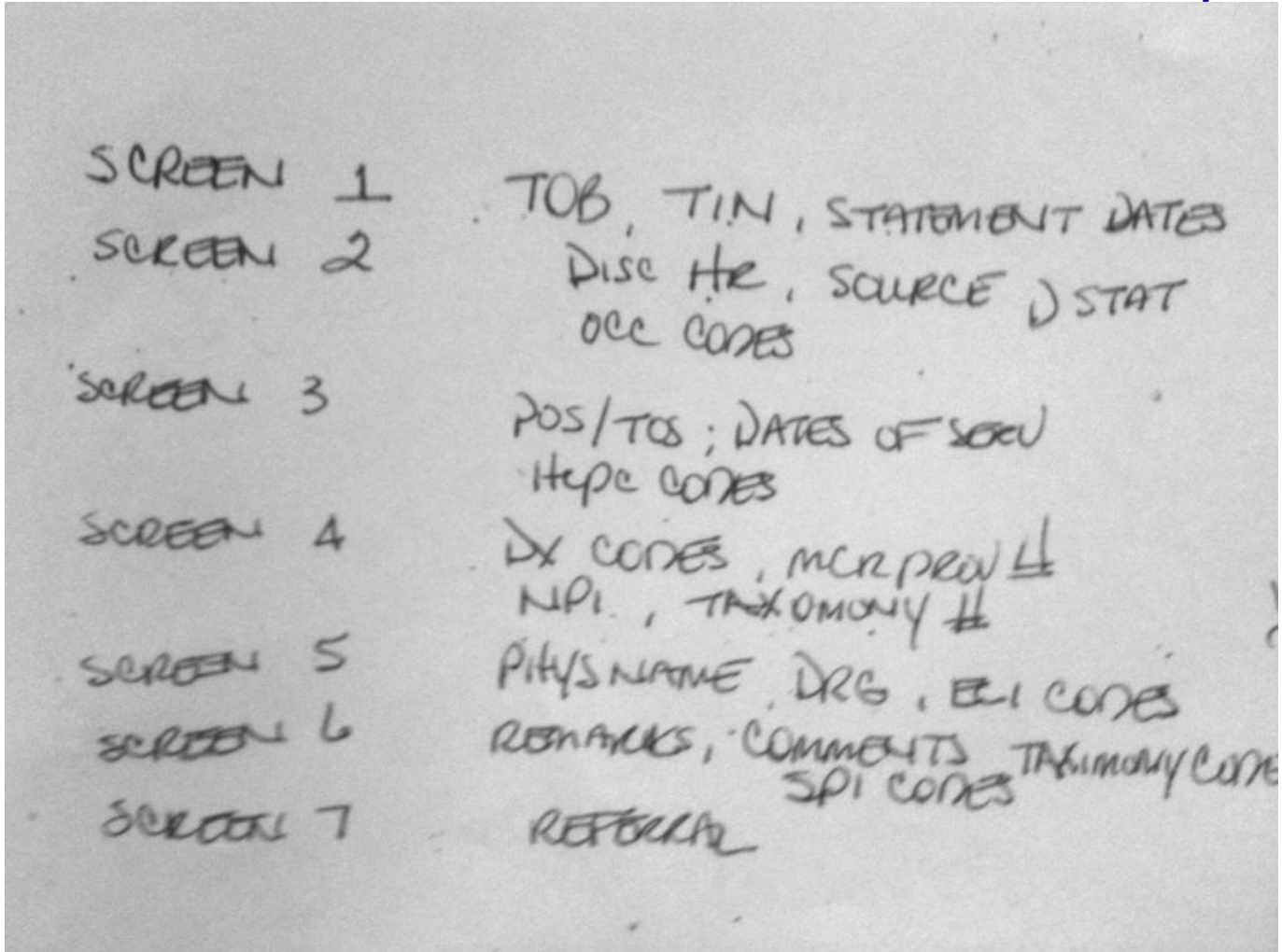


Figure 5 – Experienced claims processor II sticky note, used to navigated Baseline screens.