CEI Cincinnati Eye Institute
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INTEROFFICE COMMUNICATION

TO: Clyde Bell, CEO
FROM: Savannah Givan
SUBJECT: Promptly - Usability Test Results

Website

Promptly.com is a system used by reception staff to check patients in at the eye clinic. The system is accessible through a web browser, primarily used in Google Chrome.

Key tasks include checking patients in for appointments, reviewing and validating insurance information, processing co-pays and outstanding balances and printing receipts or payment history when needed. The system also provides a daily list of patient appointments, allowing staff to see who is scheduled and track and update appointment status.

Test Method

The usability test was conducted by completing 3 tasks. To prepare for the test, the 3 common tasks were defined based on the responsibilities front desk staff performs daily. These tasks are repeated frequently throughout the day and are time-sensitive. The tasks included checking a patient in, locating an upcoming patient appointment and printing previous patient payment records.

The participants selected were 3 of 6 receptionists at the Retina clinic. Each user regularly uses Promptly for their job and have experience using the clinic's previous system, Phreesia. This allowed for comparisons between the two systems during my observations. All users ranged from age 24-40, each having various levels of experience. Task completion time was tracked through observation and notes were taken based on the sequence of events the user took to complete each task.

Findings

Task 1: Patient Check-In
Average time: 3-4 minutes

One user paused multiple times while navigating between screens, indicating uncertainty about whether the correct steps had been completed. Another user commented on the number of clicks required and noted the process felt longer than expected for a routine task. The third user completed the tasks successfully but had to scroll frequently due to the limited patient information visible on the screen at once. A common issue across all users was the filters and headers taking up a huge portion of the screen, reducing visible patient information and slowing down the check-in process.

Task 2: Find Upcoming Patient Appointment
Average time: 30-45 seconds

Users were able to find upcoming appointments but the process was inefficient. One user had to repeatedly adjust the filters and click the search button to refresh results. Another user assumed results would update automatically and were confused when no changes occurred. The third user expressed uncertainty about whether filters had been applied correctly. All users pointed out the lack of automatic refresh when filters are updated. This is a major painpoint, adding unnecessary steps and interrupting the workflow.

Task 3: Print Previous Patient Payments
Average time: 1 minute

Users were able to print previous payment records but were inefficient. One user misread the appointment details due to low text contrast and had to double-check information, select the back button then scroll to find the correct patient. Another user noted that important details did not stand out visually. Across all users the lack of clear visual hierarchy made screens harder to scan quickly, increasing user error.

Recommendation

Based on these findings, significant improvements are recommended below.

First, the filter section should be reduced in size or made collapsible. It currently takes up a large portion of the screen and limits how many patient records can be viewed at once. In clinics with over 300 appointments each day, this design is inefficient and increases scrolling and clicks. Reducing the size of the header buttons at the top would also help improve screen space.

Second, patient records should have a stronger visual hierarchy. Appointment times should be displayed with greater contrast such as bold text, with the provider name

listed directly under it. This would improve scanability and reduce errors during fast-paced times of the day.

Finally, the system should automatically refresh when filters are updated. Users currently have to manually click the search button after each change, which adds unnecessary steps and slows down repetitive tasks. An automatic refresh feature would reduce clicks, improve efficiency and better support front desk staff during high volume periods.