User Testing

Patient Education Department

Lakeshia Brown, MPH, CHES
Lorene Payne, EdD, MSN, RN-BC

Conflict of interest

The presenters have no conflict of interest to declare
Objectives

Participants will describe the user testing process as applied to formative evaluation of patient education materials.

Background

- Effective patient education materials = understood by patients and caregivers
- Formal user testing process
- Adapted process for our target population from information found in the literature
Tools created

- Description of the process
- Data tally sheet for recording responses
- Summary page
**User Testing Tally Sheet**

Name of educator: ____________________  Date of testing: ____________  [Circle current Round: 1 2 3]

Identify 10 patients or family members who meet the inclusion criteria and do not have any exclusion criteria.

Allow participants to read the document (up to 1 minute), but assure them they do not have to memorize it. They will use the documents to find answers to questions. Ask each question one at a time. The patient needs to find the answer and explain (without showing) what the answer means. So for each question, the patient will be asked to show where in the document the question is answered, and then what the answer means.

Enter each participant’s response in one column. All patient 1 responses enter in the Patient 1 column. Proceed to patient 2, etc.

When they are able to answer, put “Y” (yes) in the box. If unable, put “N” (no) in the box.

<table>
<thead>
<tr>
<th>Content questions: replace short questions with phrases from p.2</th>
<th>Patient 1</th>
<th>Patient 2</th>
<th>Patient 3</th>
<th>Patient 4</th>
<th>Patient 5</th>
<th>Patient 6</th>
<th>Patient 7</th>
<th>Patient 8</th>
<th>Patient 9</th>
<th>Patient 10</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are you familiar with using the oozing tool?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are you familiar with using the oozing tool?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are you familiar with the use of the oozing tool?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are you familiar with the use of the oozing tool?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are you familiar with the use of the oozing tool?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Totals: In the agg for each question, add all “Y” answers for “able to find”, then add all “Y” answers for “can identify” total number in end column. The Total column must be filled in before the document is passed. If not, rewrite the document and revisit in another round.

---

**Formative Evaluation Summary**

Name of document: ____________________

Reading level of document: ____________________

Date(s) of user testing: ____________________

Name of the staff facilitating user testing: ____________________

Results - data:

<table>
<thead>
<tr>
<th>Questions</th>
<th>Patient 1</th>
<th>Patient 2</th>
<th>Patient 3</th>
<th>Patient 4</th>
<th>Patient 5</th>
<th>Patient 6</th>
<th>Patient 7</th>
<th>Patient 8</th>
<th>Patient 9</th>
<th>Patient 10</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Did all questions meet the back of 10 pass rate?</th>
<th>Yes: Document passes user testing. If not, rewrite document and proceed to round 2. Continue until 10 out of 10 standard met.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments/questions raised: Remember to evaluate the qualitative comments and suggestions that occurred during user testing into the document.

Results: ____________________

Conclusion: ____________________
Now the department was ready to perform user testing….

User testing process

Prepare:

5 questions about content covered
  • Based on objectives and target audience
  • What do you want them to learn?

Insert questions into user testing tally sheet

Print the education document and tally sheet
Data Collection

Find patients willing to participate
inclusion/exclusion criteria
common areas; waiting rooms
emphasize testing our document – not the patient

Allow time to look over document
do not try to memorize
use document to answer

Record patients’ responses
Enter Y (yes) or N (no)
Both qualitative and quantitative

Analyze Results

• Add all “Y”s (yes) in each row
• Passing user testing result: 8 or more Ys to both aspects of all 5 questions
• If passing score, no retest needed.
• If not passing – revise document per questions “failed”
• Repeat user testing (round 2)

• Consider qualitative input whether pass or fail
Example - before

Document met all health literacy standards:

- Font
- Headings
- Bullet points
- Reading level
- White space
Improved after user testing

Minor changes
- Heading (remove “special” from “instructions”)
- Relocated instructions to beginning of document
Results

- Completed approximately a dozen documents
- Pass rate on round one is approximately 90%
  - Round 2 pass rate = 100%
- This verifies that our departmental standards are good for patient understanding
- Qualitative feedback resulted in revisions to almost 100%

- Future: Continue user testing for near future until we have a healthy “n”

References
