

PENDO 
MONIUM
2024

PENDOMONIUM 2024

Combining Pendo with usability studies





Speakers



Julie Poole

Director of Product Ops
Ensemble Health Partners

Allison Hopkins

Lead Product Manager
Ensemble Health Partners



We deploy innovative tech to **solve financial problems** for hospital systems.



Data Ingestion

Ingest + standardize massive amounts of data from various sources

Payer, provider + vendor data

Enterprise data lake

Seamless integration with existing client systems + rapid onboarding



Workflow + Automation

Analyze data sets, identify opportunities + automate or direct best next actions

Predictive analytics

Rules engines + workflow

Process automation



Business Intelligence

Real-time monitoring, dynamic dashboards + automated reporting

Enterprise data warehouse

Real-time performance visibility + insights across client base



Managing change is imperative



Onboarding associates

- o Transitioning from their systems and workflows to ours
- o Limited time for in-depth training
- o Minimize workflow disruption, context switching



Launching new applications

- o Staff transitioning from something they could control to having to work within an application
- o New workflows
- o Ability to measure the completion of their tasks
- o Resources available in application



How we improve employee experience

What is a usability study?

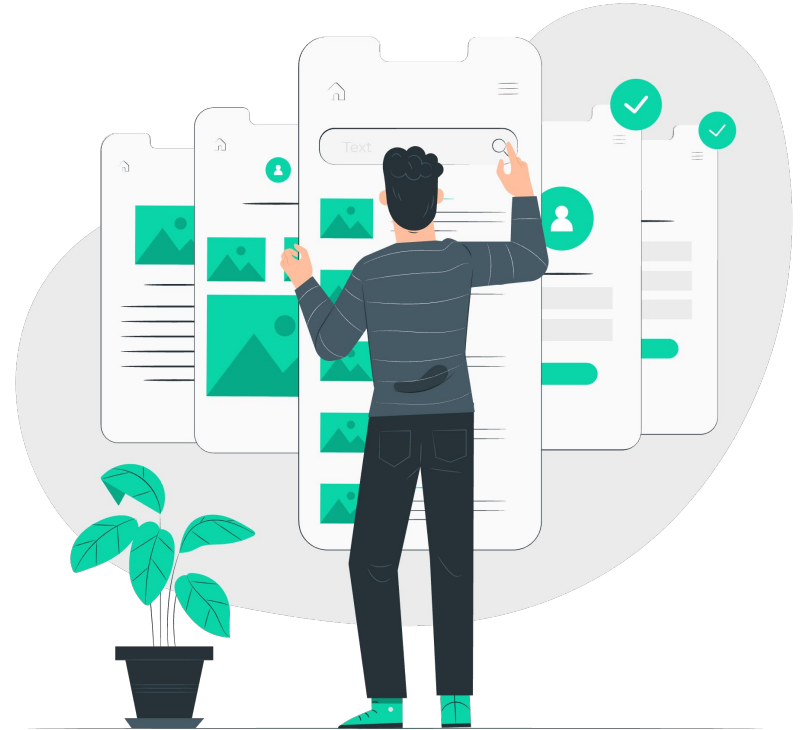


Overview

It's when you ask people to try to use a product to see how easy or hard it is for them. This product could be anything from a mock – up, prototype or working module.

The Goal

- > Watch and learn from these people.
- > Can they use the product without help, how they feel while using it and if they like using it.
- > If they have problems, you want to understand what those problems are and how to fix them.
- > This helps make the product better and more enjoyable for everyone to use





User acceptance testing vs. usability studies.

What's the difference?

User Acceptance Testing (UAT)

Responsibility of Product

- > Verifying that the software meets specified acceptance criteria
- > Centered around making sure that the product functions properly for end users

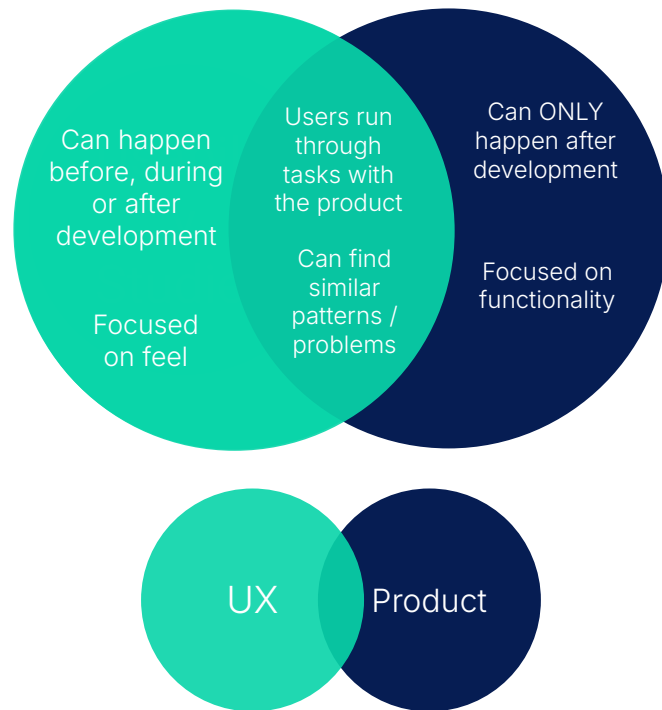
Usability Studies

Responsibility of UX

- > Evaluate the ease of use and the user experience aspects of the product
- > Centered around overall user satisfaction before / during / after interacting with the product

General Guideline

- > UAT is how a product **functions**
- > Usability studies are how it makes end users **feel**





Leverage usability studies:

Framework

Cash Posting Usability Study

A friendly chat where you try out the new tool with a few tasks while someone watches to see what's easy or hard, so, they can make it better for you (and others)!

What to expect

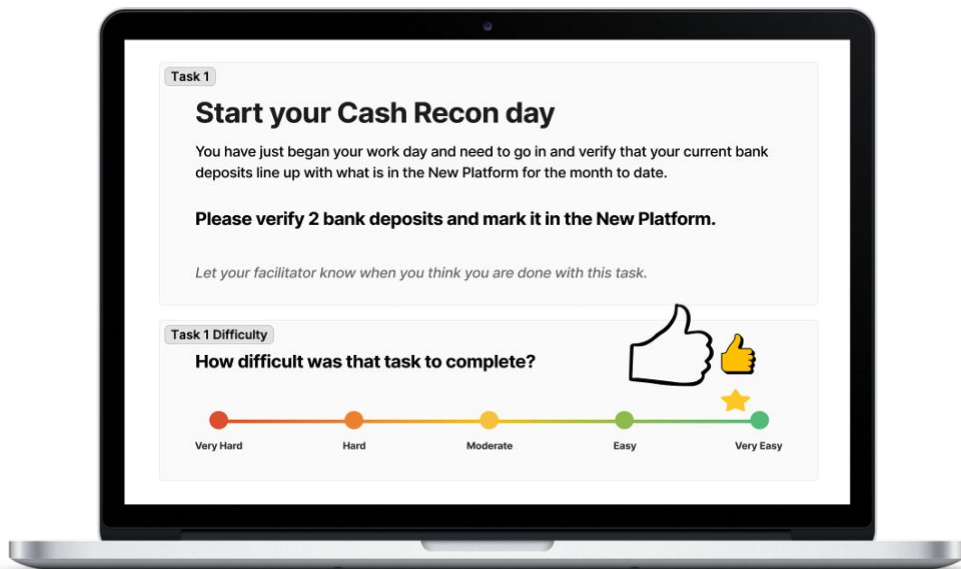
- > Run through a few tasks with provided tool.
- > Answer a few questions about the tool relating to tasks.

What happens next

- > Based on your feedback and others we will make improvements to the tool before release.

Things to keep in mind

- > This is not a test. There are no right or wrong answers and we're not evaluating your performance in any way.





Leverage usability studies:

Identifying pain points

Q

Looking back at the Summary Page, do you know the difference between "**Deposit Total**" and "**Posted Total**"

A

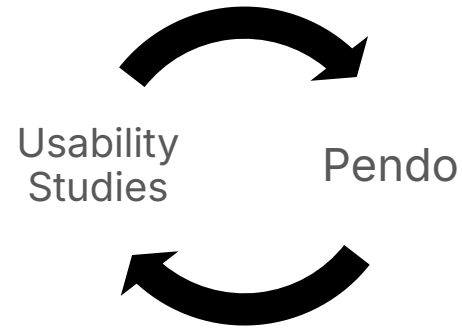
YES – YES – YES

Q

Looking back at the Variance Page, do you know the difference between "**Add Transaction**" and "**Add Payment**"

A

NO – NO – NO



Leverage usability studies:

Identifying pain points



Q

A

Q

A

Cash Onboarding Guide – Variance Details – Add Transaction

Ensemble Health Partners | RCM Cash | Onboarding

Add a description

Settings | Guide Metrics

Content

Add New

This button provides the ability to add a new client finance transaction, or associate an unmatched transaction to your variance. This Guide will walk you through what adding a new transaction will look like first, then how to add an unmatched posting. Click 'Add New' to start.

Step 1
Page: Cash - Detail Variance

STEP 1 OF 2

Transaction

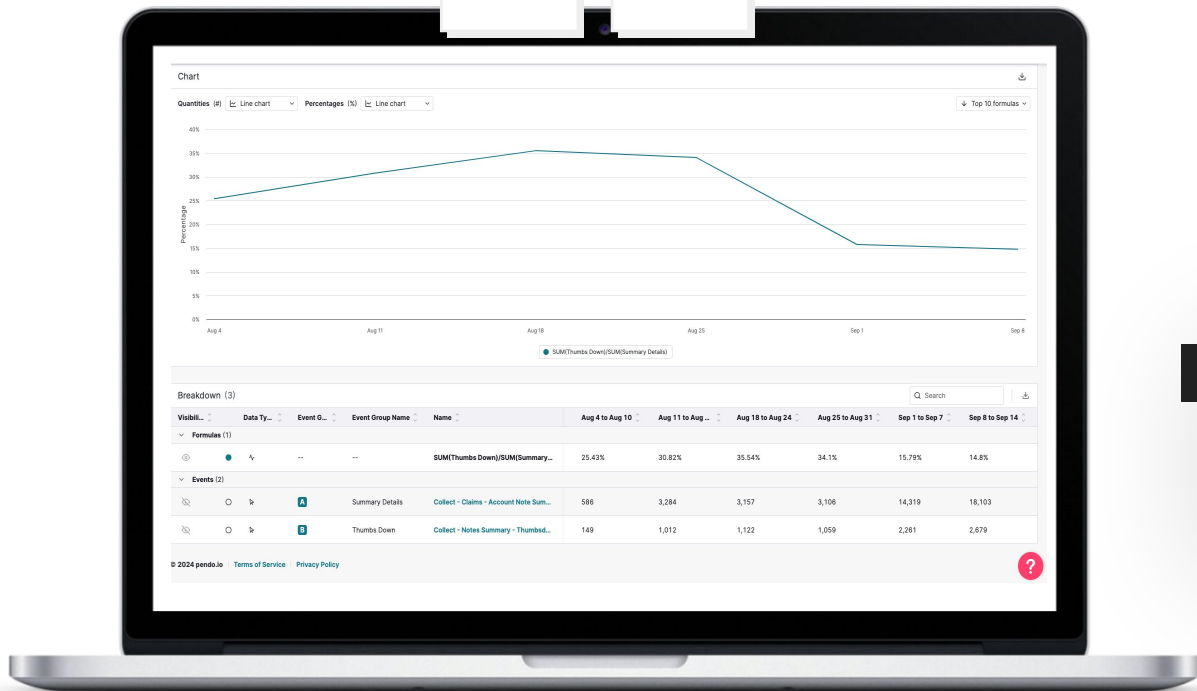
This feature allows you to input the details of a non-patient cash transaction that will help clear the deposit's variance. Click 'Transaction' to continue.

Step 2
Page: Cash - Detail Variance

● ○ ○ ○



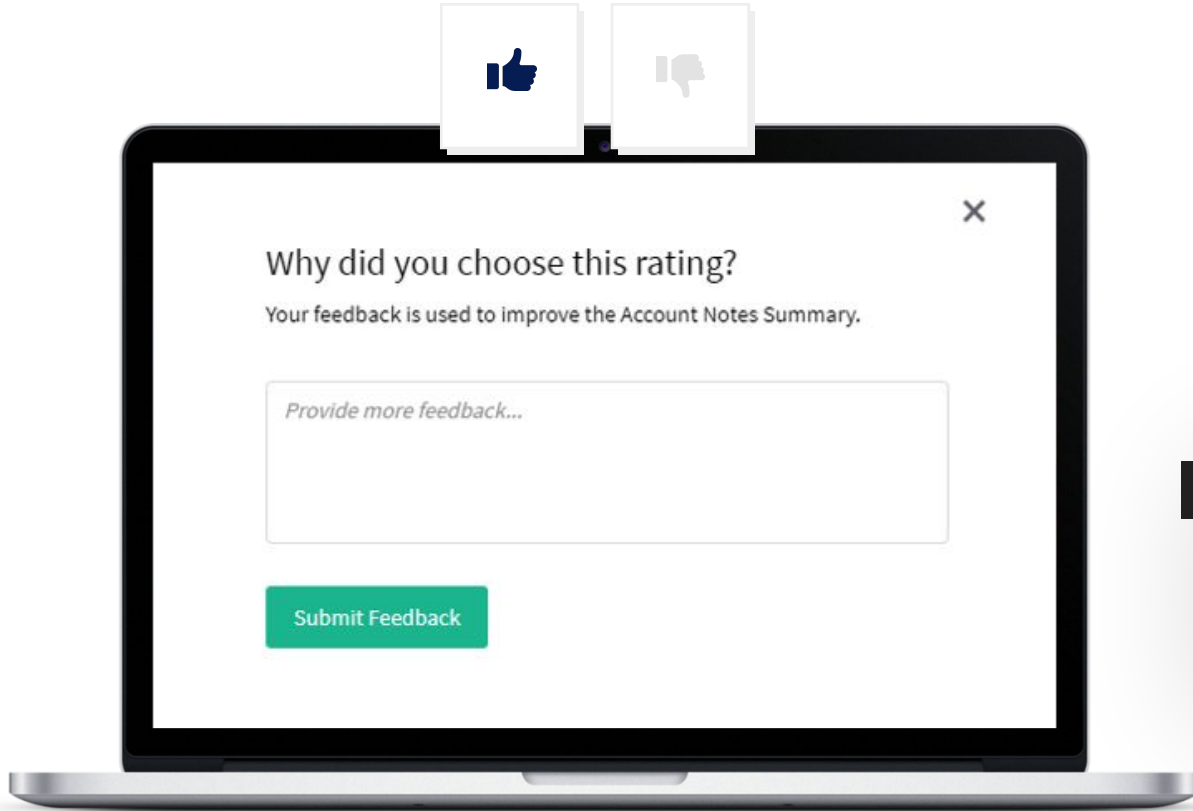
How do we use Pendo



Leveraging Pendo: **Validating Impact**



- > Built Data Explorer Report
- > Thumbs down to total views



Leveraging Pendo:

Qualitative Feedback

- > Create an open-ended poll
- > Second time they click thumbs down
- > Available for a short window



Leveraging Pendo:

Validate workflow

What are you trying to measure?

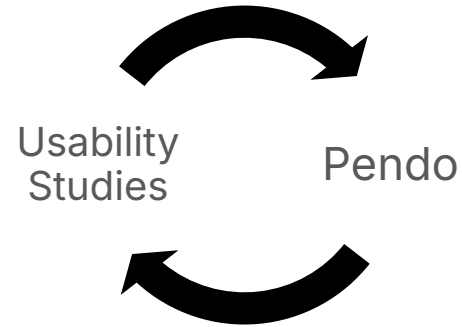
Time taken from CREATE LETTER button until letter is updated and uploaded into the system

What parts of the product indicate successful usage?

- > Appeal record initiated
- > Creating a new letter template
- > Editing and uploading letter back into system

Manual time studies

- > Inconsistent tracking
- > Biased towards expert users
- > Small sample size
 - Shadowing also small sample size



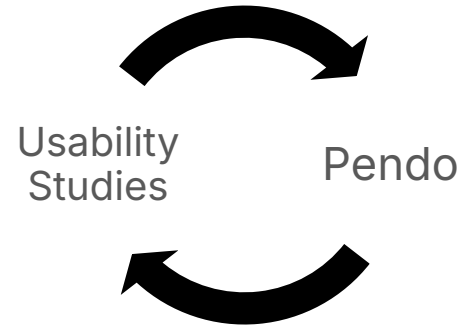
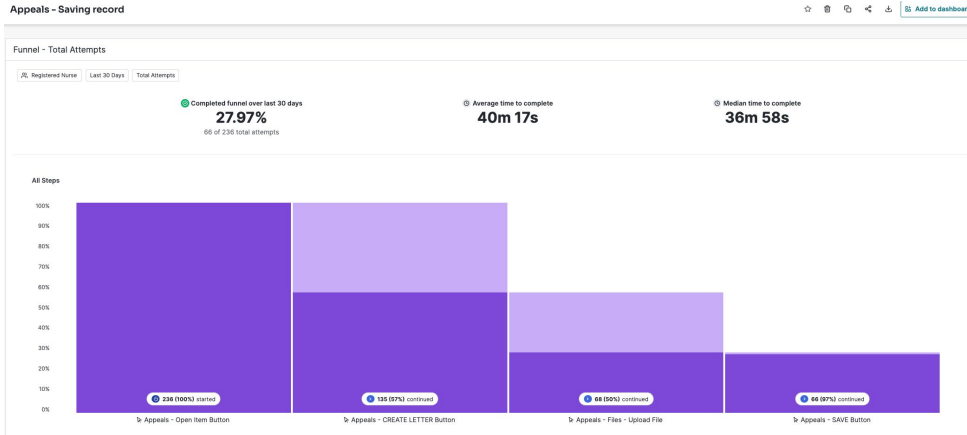


Leveraging Pendo:

Validate time to complete a task

Pendo Insights

- > Workflows: Saw all the variability within the task
- > Created segment of targeted users
- > Using Journeys: Focused on when specific tasks performed
- > Funnel can get to specific time between "X" number of steps



Usability study:

Done during user acceptance testing



Original Design

- > Grid format
- > Simple
- > Straightforward

Perfect Right?

Search Results / Remit Details

Remit Details Account Number 0000000000 Client New Search

Account Overview **Payment Overview**

Patient Name Patient Name	\$200 ● Total Patient Responsibility	\$800 ● Deductible	\$0 ● Coinsurance	\$0 ● Copay
Subscriber Name Subscriber Name	\$2,000 ● Amount Billed	\$200 ● Plan Paid	\$40 ● Adjustment Amount	\$0 ● Denied
Subscriber ID 1235364356				
Payor				

Service Line Details

Rev Cd	DOS	Service	Qty	Amt. Billed	Adj. Amt	Ins. Payment	Ins. Contractual	Denied	Copay	Deductible	Coins	Pt. Resp...	CAS Codes
Value	2/2/2022	Value	Value	Value	Value	Value	Value	Value	Value	Value	Value	Value	● Co 3 ● Co 5
Value	2/2/2022	Value	Value	Value	Value	Value	Value	Value	Value	Value	Value	Value	● Co 3 ● Co 5
Value	2/2/2022	Value	Value	Value	Value	Value	Value	Value	Value	Value	Value	Value	● Co 3 ● Co 5
Value	2/2/2022	Value	Value	Value	Value	Value	Value	Value	Value	Value	Value	Value	● Co 3 ● Co 5

Usability study:

Resulted in application redesign



Search Results / Remit Details

Remit Details

Account Number: 0000000000

Account Overview

Patient Name	Patient Name	\$200 Total PL Responsibility	\$800 Deductible	\$0 Coinsurance
Subscriber Name	Subscriber Name			
Subscriber ID	1235364356			
Payor		\$2,000 Amount Billed	\$200 Plan Paid	\$40 Adjustment

Service Line Details

Rev Code	DOS	Service	Value
12345	xx/xx/xxxx	Labs	
12345	xx/xx/xxxx	Physical	Value
12345	xx/xx/xxxx	ADHD Testing	Value
12345	xx/xx/xxxx	Service Description	Value
12345	xx/xx/xxxx	Service Description	Value
12345	xx/xx/xxxx	Service Description	Value
12345	xx/xx/xxxx	Service Description	Value
12345	xx/xx/xxxx	Service Description	Value
12345	xx/xx/xxxx	Service Description	Value
12345	xx/xx/xxxx	Service Description	Value

Selected Rows: 1

Remit Service Line Details

Labs

Amount Billed	Value
Adjustment Amount	Value
Ins. Payment	Value
Ins Contractual	Value
Denied	Value
Copy	Value
Deductible	Value
Coinsurance	Value
PL Responsibility	Value

CAS Codes

Code	Amount
Co 3	\$40
Co 43	\$200

Previous Next

2 of 5

Search Results / Remit Details

Remit Details

Account Number: 0000000000 Client: [dropdown] [New Search](#)

Account Overview

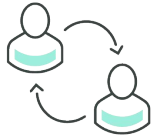
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Subscriber Name	Subscriber Name				
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Payor		\$2,000 Amount Billed	\$200 Plan Paid	\$40 Adjustment Amount	\$0 Denied

Service Line Details

Rev Cd	DOS	Service	Qty	Am Billed	Adj Amt	Ins. Payment	Ins. Contractual	Denied	Copy	Deductible	Code	PL Resp...	CAS Codes
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Value	2/2/2022	Value	Value	Value	Value	Value	Value	Value	Value	Value	Value	Value	Co 3 Co 5
Value	2/2/2022	Value	Value	Value	Value	Value	Value	Value	Value	Value	Value	Value	Co 3 Co 5
Value	2/2/2022	Value	Value	Value	Value	Value	Value	Value	Value	Value	Value	Value	Co 3 Co 5



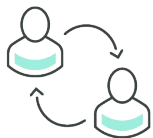
Lessons learned



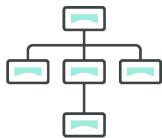
Usability studies
are best
one-on-one.



Lessons learned



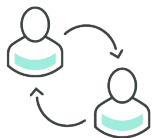
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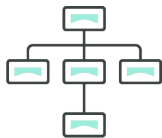
Define your
path(s) / workflow(s)
in Pendo before
usability study.



Lessons learned



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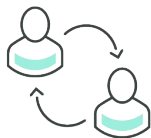
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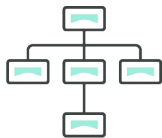
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one and done.



Lessons learned



Usability studies
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Define your
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usability study.



Usability studies
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one and done.



Pendo + usability
studies are very
compatible and may
inform each other.

- > Usability studies to identify where to put tooltips / guides
- > Pendo to identify when sub-optimal workflow for deeper dives



“As the product manager, I thought I was the expert on what the users needed. I was surprised and humbled by the findings from our usability study.

I am happy that we were able to make the design adjustments that had a positive impact on the user experience.”

-Melanie, Lead Product Manager

Ensemble Health Partners



Q&A



Thank you!

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