Form Approved

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A. Email outreach to STLT beta partners:

Hi [STLT PoC Name],
Our team would like to invite you to join a group call with our 4 other jurisdictional beta partners on [Date] where we will share learnings and updates from our MMG Onboarding Beta Program. During this call, we will share an update on our team's progress in addition to themes from speaking with yourself and other beta program jurisdictions, the CDC MMG Onboarding (edx) Team, CDC Programs, APHL, and the NBS GDIT team. We're interested in hearing your questions and feedback in addition to any additional context and clarification on our understanding of the jurisdictional MMG Onboarding process and pain points that you would like to provide. Please let us know if this date and time doesn't work for you, and we can find a time that works better for you and the other beta partners. We are also happy to send you the slide deck and a recording of the call if you prefer.

As part of our team's progress update, our designer has created initial designs for a jurisdiction self-service MMG Onboarding tool called "CaseBridge" which will incorporate the Implementation Spreadsheet and Test Case Scenario Worksheet and provide validation for both spreadsheets and uploaded HL7v2 test messages. Following the Beta Program group call, we'll send you an invitation to schedule a user input session for the CaseBridge designs. We'll have you click through the designs as though you're onboarding to a new MMG, completing the Implementation Spreadsheet, and receiving automated, real-time feedback within the tool. Your input will directly inform updates to these designs. Below is a screenshot of one of our CaseBridge designs which we'll have you click through and provide feedback on during the user input session.

[insert screenshot of tool]
It is completely optional to participate in both the group call and the user input session. If you are unable to participate at this time, we're happy to keep you updated on our team's progress, and you can choose to opt out of these emails at any time. We want to be respectful of your time and are high appreciative of the input you've already provided us from our previous conversation. Hearing your MMG Onboarding process and pain points helped inform the creation of the CaseBridge designs, and we hope this tool can reduce MMG Onboarding time in addition to reducing manual entry and error and back-and-forth communications with APHL and the CDC MMG Onboarding (edx) team.

Please reach out if you have any comments or questions and feel free to forward this email to anyone else at your health department who would be appropriate for this project!

B. Semi-structured user testing guide

Agenda

1. Intros/warm-up (~2-4 min)
2. Follow up requirements gathering questions (~10-15 min)
3. CaseBridge demo (~30-40 min)
4. Wrap up and next steps (~5 min)

Intros/warm-up (2-4 mins)

[Provide an overview of what to expect without disclosing too many details that could bias the outcome.] Thank you for taking the time to review our initial designs for CaseBridge, a jurisdiction self-service tool for MMG Onboarding.

(if there are individuals on the call we haven't spoken with yet) I'm Peggy from Skylight, a government contractor working with the CDC to improve the MMG Onboarding process.

With me on the call are a few colleagues (including **[members of our product and development team]**, **[Marion]** who will be helping out with notetaking and may raise their hand with follow up questions during the call.

(if there are individuals on the call we haven't spoken with yet) During this session, I'll first ask you a couple requirements gathering questions about your role within **[STLT]** and your work as it relates to MMG onboarding: test message validation. Then I'll send you a link to a clickable design and ask you to share your screen with the design open.

We anticipate this session will take about 1 hour. Is that all right with you?

[Remind them of confidentiality and ethical standards] We take your privacy seriously. We won't share any personal information about you. We won't record your identity or sensitive information about you in our requirements gathering findings or share outs. That being said, we would like to record this session so we can transcribe it. We do have a team member on the call taking notes if you are not comfortable with recording. **Do we have your permission to record?**

[if yes] I'm going to go ahead and start the recording now. **[hit record on ZoomGov Webinar]**

Do you have any questions before we begin?

Questions

Requirements Gathering Questions (if there are individuals on the call we haven't spoken with yet)

1. Can you tell me a bit about your background and current role?
    a. [**if not answered above]** Are you involved with reporting case notification data (such as MMG HL7v2, NETSS, GenV1, etc.) to NNDSS?
        i. **[If not]** Who at your agency is responsible for this work?
        ii. Are other offices/divisions within your agency involved? Do you have vendors involved?
        iii. **[If yes]** How are you involved with reporting case notification data?
            1. **[if yes]** Are you involved with onboarding MMGs (message mapping guides)?
                a. **[if yes]** Are you involved with preparing the implementation spreadsheet, test case scenario worksheet, and/or test messages for implementing MMGs?
2. Based on our understanding, you are using [surveillance system] and have onboarded to [MMGs] and are currently onboarding to [MMGs]. Is that correct?
    a. Which MMGs have you been involved in onboarding / are you currently working on onboarding?
    b. How do you prioritize which MMG to onboard next?

Follow up questions for existing beta partner STLTs

1. Which MMG(s) do you plan to onboard next?
    a. How do you prioritize which MMG to onboard next?
2. How many individuals at [STLT] will directly fill out and edit the IS & TCSW during the MMG pre/onboarding process?
    a. When would the individual editing the spreadsheet change (personnel changes, staff busy with other projects, etc.)?
    b. Do individuals ever fill out the IS & TCSW simultaneously? Please describe.
3. How do you currently use the filled out IS (e.g., during Gap Analysis, meetings with STLT Disease Program epis, etc.)?
4. **(if multiple people in call)** Who will be clicking through the CaseBridge design for today's demo today?
    a. (if haven't spoken with this individual previously)
        i. How much experience have you had with onboarding to MMGs?
        ii. Do you typically fill out the IS & TCSW? Which additional steps do you do?

<u>Tasks</u>

Great! Now we'll move to the demo portion. I'll provide you with various tasks that mimic your current process when filling out the Implementation Spreadsheet during MMG Pre-Onboarding, and I'd like you to click through the CaseBridge design to complete these tasks. Throughout this session, I'd like you to "think aloud". This means to say what you're thinking at that moment, like "oh hmm I see this button says "Submit" but given what I'm seeing on the screen, I'm not sure what will actually happen when I click it. I guess I'll go click it" and so on. Please be as open and honest as possible so we can make changes to ensure this feature meets your needs. Also, please keep in mind I may not answer your questions immediately and instead will ask you to take your best guess if you're not sure what the next step should be or if you're confused by something—this is so we can better understand what changes we should make to CaseBridge so it best meets your needs. NOTE: this is a prototype so can't click everything

Scenario: We're going to imagine that you're the onboarding [GenV2 MMG] for [STLT]. At this point, you've completed the initial gap analysis steps and mapped your surveillance system [case report form/page] to the MMG specifications and are ready to fill out the Implementation Spreadsheet using the CaseBridge Data Planner.

[Instructions for screen sharing and thinking aloud] I'm going to send you a link to a clickable CaseBridge design. I'll ask you to open this link and then share your screen. Please minimize any windows you wouldn't want us to see or have recorded.

[Send link in the ZoomGov chat]: Let me know if you have any issues with accessing this link.

<u>CaseBridge: Dashboard First Impressions</u>

1. Tell us your first impressions of this screen.
    a. **[optional follow up questions depending on what participant says organically]**
        i. What was the first thing you noticed?
        ii. What about this page do you like, if anything?
        iii. What about this page do you dislike, if anything?
        iv. What, if anything do you find confusing?
        v. [content follow up questions]
            1. Is the messaging on the page clear to you? If not, what isn't clear? Please describe.
            2. Is there any area of the page where you could use more context / explanatory text?
2. Do the 3 steps make sense to you based on your experience with the CDC MMG Onboarding process? Why/why not?
    a. What, if anything, is missing?
    b. What, if anything, seems out of order?
3. What information in the Recent activity table is useful to you? Why/how would you use that information?
    a. What information, if any, is missing?
    b. What information, if any, is confusing?
    c. Looking at the 3 MMGs in the table, at which stage is the...

        i. Hepatitis MMG?
        ii. Meningitis MMG?
4. When would you Delete a Data Planner? Please describe.
    a. When would you want to un-delete a Data Planner? Please describe.

<u>Task 1: Onboard to a new MMG</u>

1. We know that at this point, you would have most likely onboarded to the GenV2 MMG prior to onboarding to the other MMGs. But for the purposes of this session, we'll now ignore the MMGs in the Recent activity bucket and imagine you'd like to onboard to the GenV2 MMG. How would you go about doing that?
    a. *Click "START A NEW PLAN"*
    b. *Click "TYPE OR SELECT"*
    c. *Click "SELECT AND CONTINUE"*
2. How was the process of selecting an MMG?

<u>Task 2: Review Data Planner for GenV2 MMG</u>

Data Planner

3. Is this what you expected to see? Why/why not?

Feel free to scroll up and down on this page and tell us what you think as you look through it.

4. Are the instructions on this page helpful or not helpful? Why?
    a. What additional instructions would be helpful to include? Where?
5. Is the option to print out a blank Data Plan useful? If so, how would you use it? Please describe.
6. What information on this screen is useful to you when filling out this form? How do you use this information?
7. Are the data elements grouped and ordered how you would fill them out? Why / why not?
5. Is the language of Save Progress vs. Review Data Plan vs. Save Data Plan and Download CSV clear?

a. What do you expect to happen when you click...
    i. Save Progress?
    ii. Review Data Plan?
    iii. Save Data Plan and Download CSV?

6. What would you expect to see when clicking on View Help Content? What would be useful to you?
7. How would you find out more information about the Message profile identifier data element?
    a. *Click View Metadata*
    b. Is this information useful to you? Why/why not? When would you use this information?
    c. Would you want this more visible?
    d. (add in looking at priority info)

<u>Task 3: Fill out Collected status for an individual data element</u>

8. How would you go about marking the **Message profile identifier** as “Not Collected”?
    a. What thoughts do you have on these options?
        i. Do they make sense? Why/why not?
        ii. What’s missing or should be changed if at all?
    b. How would you go about adding a “Not collected reason” for the message profile identifier data element?
        i. *Click EDIT button under Notes*
        ii. Is that what you expected to see when clicking the “EDIT” button? Why/why not?
        iii. What are your thoughts on the information within the Notes section?
        iv. What would you typically fill out in the Notes section?

<u>Task 4: Use Bulk Actions to filter for high priority DEs and bulk select collected status</u>

9. How would you go about marking all the Priority R, 1, and 2 Subject related data elements as “Collected”?
    a. *Click Only High Priority filter*

  b. *Select all checkbox*
  c. *Click BULK ACTIONS*
  d. *Click Change collection status*
  e. *Click Yes*
  f. Would you bulk mark data elements as collected or not collected based on priority level? Why/why not?

10. What would you do if you wanted to save what you've done and switch to another task?
    a. How often does this typically happen?
    b. *Click Save Progress*
    c. How would you go about finding this GenV2 MMG Data Planner again?

Task 5: Review and fix errors in Data Planner

11. Imagine you've filled out this portion of the Data Planner and now you want to have the tool check for errors. How would you go about doing that?
    a. *Click Review Data Plan*
    b. Review the errors. Which errors make sense vs. not? How would you go about fixing each of these 4 errors?
12. How would you share this Data Planner with other individuals such as disease program epidemiologists at [STLT] for review and discussion?
    a. *Click Save Data Plan and Download CSV*
    b. Is that what you expected to see? Why/why not?
    c. When would you use this spreadsheet?
    d. When would you use the Data Planner vs. the spreadsheet for purposes within [STLT]? Please describe.

Dashboard

13. Is this what you expected to see? Why/why not?
14. How would you review GenV2 Data Planner?

a. Is there a scenario where you would want to edit an MMG Data Plan again or delete a filled out Data Plan? Please describe.

Follow up questions

1. How was the overall experience using CaseBridge?
   a. What do you like? What do you dislike?
   b. What did you think of the Dashboard?
   c. What did you think of the Data Planner?
      i. How does it compare to your current MMG pre-onboarding process when completing the Implementation Spreadsheet?
   d. If you could wave a magic wand, what would you change about CaseBridge?
2. We plan to incorporate the Test Case Scenario Worksheet into CaseBridge Data Planner next, and our team has a few questions to so we can hopefully reduce the manual entry burden during this step.
   a. For jurisdiction specific values in the TCSW, are they the same across all MMGs (e.g., reporting jurisdiction)? Or does each MMG have a different jurisdiction specific value?
   b. We currently plan to prefill the Data Planner using CDC provided default values and then let the jurisdiction change the values to jurisdiction specific values where appropriate. What are your thoughts on this approach?

Wrap up & Next Steps

Thank you so much for taking the time to provide your feedback on the initial CaseBridge designs! We're speaking with other jurisdictions in our beta program to look for areas of improvement in CaseBridge.

1. Would you be interested in participating in more requirements gathering and demo sessions in the future?

Please feel free to share this design link with other relevant individuals within your jurisdiction, but please be mindful not to share this link with individuals outside of your jurisdiction at this time. We are still making improvements before we'd want to share updated CaseBridge designs to a broader audience. If you think of any additional comments or areas of improvement, please feel free to email myself or [staff].
