

McKesson Pharmacy Reimbursement Dashboard Case Study

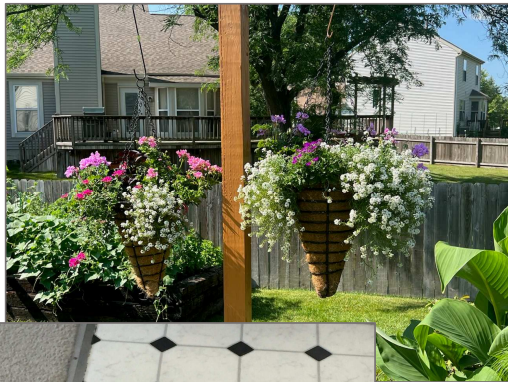
Presented by Theresa Wilkinson

McKesson Reimbursement Dashboard Case Study



Agenda

- Introduction
- Role & Responsibilities
- Timeline
- Research Statement & Goals
- Research Methodology
- Recruitment Criteria & Process
- Sample Questions/Tasks
- Analysis and& Synthesis Process
- Outputs/Deliverables
- Impact
- Next Steps & Recommendations
- Reflections



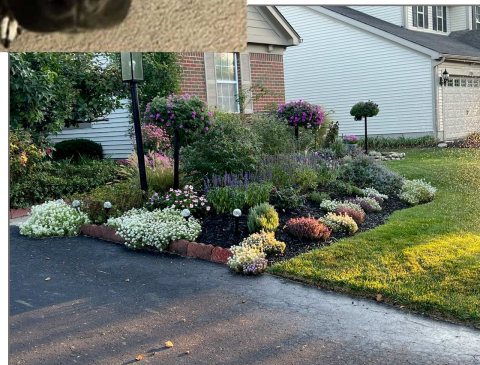
Avid gardener



Romulus



Spartacus & Aurelius



History buff

I enjoy helping people and am an avid gardener. During the summer, I plant extra vegetables so that I can give some away to my neighbors.

In between gardening tasks, I assist my neighbors with their yard work.

What I appreciate about UX research is that it enables me to assist more individuals, including end users, stakeholders, product owners, product teams, and the company I am working for.

I enjoy making connections with people so that I can find ways to support them.

McKESSON

McKesson Corporation is an American company distributing pharmaceuticals and provides health information technology, medical supplies, and care management tools. The company delivers a third of all pharmaceuticals used in North America.

McKesson works with biopharma companies, care providers, pharmacies, manufacturers, governments, and others to deliver insights, products, and services that make quality care more accessible and affordable.

About the project:

Every year, McKesson funds employee ideas as a special project. Employees present ideas to management for approval. The Prescription Reimbursement dashboard was funded by this process.

Luckily, the product owners shared all the documentation they researched and presented, providing a lot of valuable information for the project.

What interested me the most about this project was the of helping independent pharmacy owners stay in business. Independent pharmacies serve rural and underserved areas. This was a fun project to work on.

Role: Lead UX Research & Strategy

Responsibilities

- Conducted research on prescription reimbursement issues.
- Created pharmacy owner story mountain and personas.
- Conducted pharmacy owner interviews and presented findings.
- Created Axure prototype with special attention to accessibility and usability.
- Built unmoderated usability test in Userzoom.
- Conducted qualitative/quantitative data analysis on information gathered, videos, and survey. Presented findings.
- Conducted a design workshop to ideate potential solutions with “how might we” questions.

I was brought in on the McKesson project as the Lead UX Researcher working with product owners and UX designers.

Not indicated in timeline:

- I multi-task and try to work ahead if possible.
- I also had several reviews with the product team and made changes.

Task	Timeline	Deliverables
Discovery & Generative research; Presented pharmacy owner interview results to product team	5 weeks	Story Mountain, Personas, User Interview Discussion Guide, User Interview Results
Built testing prototype	4 weeks	Testing prototype
Recruitment and set up unmoderated test in Userzoom	2 weeks	
Unmoderated remote usability testing in Userzoom; Started analysis, affinity mapping and creating videos; Presented results to product team	3 weeks	Usability Testing Discussion Guide; Usability Testing Results
Conducted a design workshop to consider potential solutions with "how might we" questions	1 day	List of Solutions

Research Statement

McKesson wanted to create a tool that can help independent pharmacies maximize their true prescription reimbursement and positively impact it.

Goals & Research Questions

	Goal	Research Questions
1	Understand the customers; What do they need to succeed?	What information would they want to see in the dashboard? How would they want to drill down into the information? Do they have any other ideas for charts or features? How often would they use the dashboard?
		Who in the pharmacy would likely be the primary user of the dashboard (e.g., owner, manager, pharmacist, technician, bookkeeper, etc.)?

	Goal	Research Questions
2	Improve customer satisfaction	Were participants satisfied with their experience using the prototype? Would the participant recommend the product to a friend or colleague?
3	Ease of use	Can participants successfully complete the tasks? How easy or difficult is it to complete a task? How easy or difficult is it to use the prototype? Are the labels easy to understand?
4	Understand labels	Can participants successfully complete the tasks? How easy or difficult is it to complete a task? How easy or difficult is it to use the prototype? Are the labels easy to understand?
5	Easy to navigate	Can participants successfully complete the tasks? How easy or difficult is it to complete a task? How easy or difficult is it to use the prototype? Are the labels easy to understand?

See McKesson Strategy.

Research Questions & Answers

I added answers to the research questions in the usability testing results.

Research Questions & Answers	
Research Question	
Are the labels easy to understand?	<ul style="list-style-type: none"> • Add roll-over definitions on bars • Chart names/information is not clear • Ensure chart labels are easy to understand • Rename category - "Products" is not obvious category for Discount Cards
Were participants satisfied with their experience using the prototype?	36% (4 of 11) of participants were moderately satisfied to extremely satisfied (CSAT) with their experience
Would the participant recommend the product to a friend or colleague?	NPS 25 - Anything above 20 is considered "favorable"
Did participants identify any improvements for any screens?	<ul style="list-style-type: none"> • Add Effective Rate Reports • Add hover information on charts • Add how my pharmacy is trending on a month-to-month basis • Ensure charts are drillable into detailed information • Display explanation for terms • Display metrics used for totals • Display profitability per script history

Research Questions & Answers	
Research Question	
Can participants successfully complete the tasks?	Task 1 100% (11 of 11) completed the task. Task 2 100% (11 of 11) completed the task. Task 3 100% (11 of 11) completed the task. Task 4 100% (11 of 11) completed the task. Task 5 100% (11 of 11) completed the task.
How easy or difficult is it to complete a task?	Task 1 100% (11 of 11) of participants found the task to be moderately easy to extremely easy to complete. Task 2 27% (3 of 11) of participants found the task to be slightly easy to moderately easy to complete. Task 3 36% (4 of 11) of participants found the task to be slightly easy to moderately easy to complete. Task 4 18% (2 of 11) of participants found the task to be slightly easy to moderately easy to complete. Task 5 27% (3 of 11) of participants found the task to be slightly easy to moderately easy to complete.
How easy or difficult is it to use the prototype?	45% (5 of 11) of participants found the dashboard to be moderately easy to extremely easy to use

See WISE Dashboard Usability Test Results



Discover

- Kickoff meeting for project timeline
- Requirements & constraints
- Stakeholder, sales, & product team interviews
- Pharmacy owner interviews

Questions:

What problem does this product solve?
What does success look like?



Explore

- Discovery research - Prescription reimbursement complexities & DIR fees
- Pharmacy Owner Story Mountain
- Personas



Test

- Built testing prototype and fixed usability issues
- Unmoderated qualitative usability testing with survey
- Affinity mapping
- Created video clips for final usability test report

User Interviews

The product owners contacted pharmacy owners interested in participating. I was told they were compensated with a discount to their monthly McKesson fee. User interviews were 1 hour each. A total of four pharmacy owners participated.

Usability Testing

Product owners provided an email list of potential pharmacy owners. I emailed testing invitations. More than 11 pharmacy owners participated but many were excluded because they did not say anything during unmoderated testing. Testing took about 25 minutes to complete.

Usability Testing Emails

First - Unmoderated Remote Usability Test Recruitment Email

Subject line: Could this new McKesson dashboard help you save money?

Hi,

I'm a UX Research Consultant at McKesson and we're developing a new dashboard to help pharmacies identify ways to improve profitability and cash flow.

We'd love to get your feedback. If you're interested, please reply to this email.

More about testing:

- The remote unmoderated usability test will take about **25 MINUTES** to complete.
- You can complete it anytime during the test cycle **June/July**.
- It can be completed **remotely in any quiet area with computer access**.

Again, if you're interested in participating, please reply to this email.

Thanks,

Theresa Wilkinson

Not all emails are displayed, see WISE Dashboard Usability Testing Research Plan Discussion & Guide.

User Interview Questions



- What pharmacy data around net reimbursement would be important?
- If you are a multi-store owner, would you aggregate across the stores?
- What level of information would you want to see when logging into a dashboard view?
- Combining financial data and clinical data together?
- Would you want to see any report rebates or rewards information? Generic rebates? Performance rewards? Include all that?
- Would you want to see efforts to save more money or if there is missing opportunity?
- Would you want to see benchmarking to compare with peers?

Not all questions are displayed, see Wise Dashboard User Interview Research & Discussion Guide.

Unmoderated Remote Usability Testing

Study	Target Audience	Questions
Unmoderated Remote Usability Testing After Task Questions	Pharmacy owners	After-Task Questions: <ul style="list-style-type: none"> • Overall, how difficult or easy did you find this task? • If user scales this from Extremely Difficult to Slightly Difficult, then the next question displays: Could you briefly describe why you found this task difficult? • Task Abandonment Question: Could you briefly describe why you found this task difficult? After Test Questions: <ul style="list-style-type: none"> • How would you rate the ease of using this dashboard? • Overall, how satisfied are you with your experience? • How likely are you to recommend this website to a friend or colleague? • Is there anything else we can do to improve your experience with this dashboard?

Task 1

Please take a few moments to look over this page. What are your first impressions? Please remember to verbally express your thoughts.

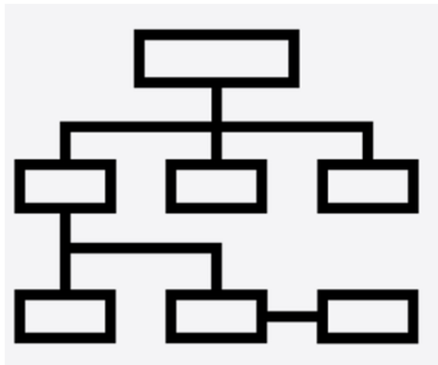
Goal	Qualitative information
Input	None
Assumptions	
Steps	User is presented with main page of dashboard
Success criteria	Qualitative information
Notes	

Not all tasks are displayed, see WISE Dashboard Usability Testing Research Plan & Discussion Guide.

Data Collection

User Interviews

All interviews were recorded and transcribed. I then marked up the transcripts and pulled the data into a spreadsheet for analysis.



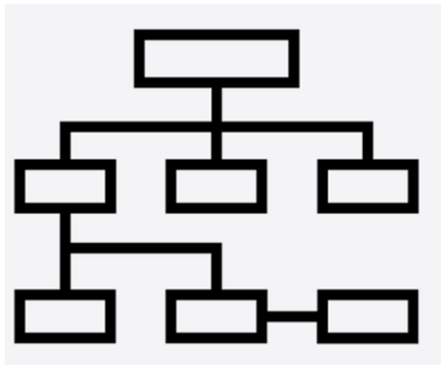
Taxonomy

- General – How often to update information on dashboard (daily, weekly, monthly)
- Data
 - Combine financial data and clinical data
 - Metrics (RX Completed, RX Price, RX per Day, Sync Patients Filled)
 - Other Information
 - 100% (4 of 4) Would find advisory board beneficial
 - 50% (2 of 4) Pick metrics you would like to see
 - 75% (3 of 4) Receive notifications or ideas to save more money
 - Pharmacy Data around Net Reimbursement
 - Next steps for data
 - Macro measures then drill down to the content behind the measures
 - Monitors reimbursements and negative reports
 - Looks for ways to save money
 - Aggregate across stores but drill-down into detail

Data Collection

Usability testing

I downloaded the Userzoom videos and had them transcribed. I then marked up the transcripts and pulled the data into a spreadsheet for analysis. I used the following taxonomy.



Taxonomy

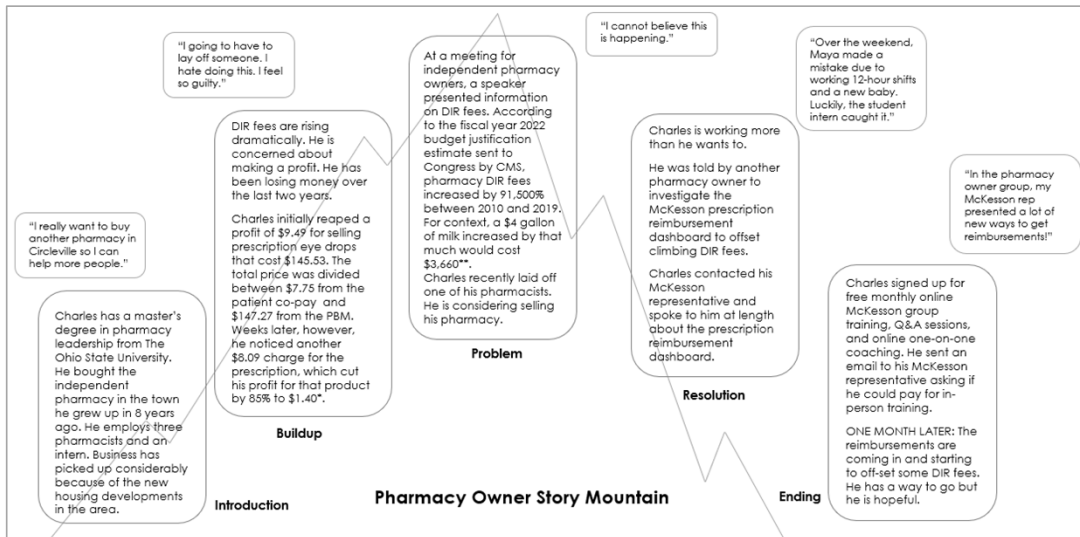
Quantitative Data

- Effectiveness/Task completion (= # of tasks completed/# of tasks undertaken x 100%)
- CSAT Customer Satisfaction Score
- Ease of Use (SEQ)
- NPS Net Promoter

Qualitative Themes

- Usability
- Missing Features
- Positive Comments
- Organization
- Navigation
- Improvements

On this project, the product owners and UX designers used a lot of pharmacy jargon. When I started my research, many of the websites I visited, like Pharmacy Times, also used jargon. I really had to dig to find information I could understand. My goal was to create a story mountain and personas that anyone could understand and empathize with.



McKesson Pharmacy Owner Story Mountain

Mariah



Charles



Maya

Conor



McKesson Personas

Pharmacy Owner Interviews Results Report and Videos

I wanted to include as many suggestions as possible because I thought that would be the most beneficial to the pharmacy owners. I scheduled an Interview Results meeting to review the report and videos.

User Interview Results

General

- 100% (4 of 4) **Update information on dashboard:**
 - 25% (1 of 4) Weekly, monthly
 - 25% (1 of 4) Monthly, trimester
 - 50% (2 of 4) Daily, weekly, monthly, quarterly

Data*

- 67% (2 of 3) **Combine financial data and clinical data**
- 100% (4 of 4) **Metrics:**
 - Sales, RX Completed, RX Price, RX per Day, Sync Patients Filled, Sync RX Filled, COGs, Gross Margin, Op Ex (Fully Loaded) Op Ex (Non-Partner)
 - Margins, Gross Net Margin Payroll, Script Volume
 - Net Acquisition Costs, Negative Margin, Negative Remit, Physician Outreach
 - GERBER, DIR

*Not all users answered all questions

See WISE Dashboard User Interview Results

User Interview Results

Data* - Continued

- 75% (3 of 4) **Pharmacy Data around Net Reimbursement** - Payers Margin, Gross Margin, ESI, Medicaid, LOBs, Special Pricing Model with Opioid using Cash Bin, Negative Margin, Negative Remit, GERBER, DIR
- 50% (2 of 4) See **data at claim level or payer level** - "Make easier to find information at claim level in work flow"
- 100% (4 of 4) **Next steps for data:**
 - Macro measures then drill down to the content behind the measures
 - Drives decisions around ESI, marketing or working with local organizations
 - Monitors reimbursements and negative reports; Looks for ways to save money; Looks for ways to cost share
 - Getting information into a table to try to reconcile the claim; Decide to save money for true-up or DIR; Decide to dispute withholding
- 75% (3 of 4) **Aggregate across stores but drill-down into detail**

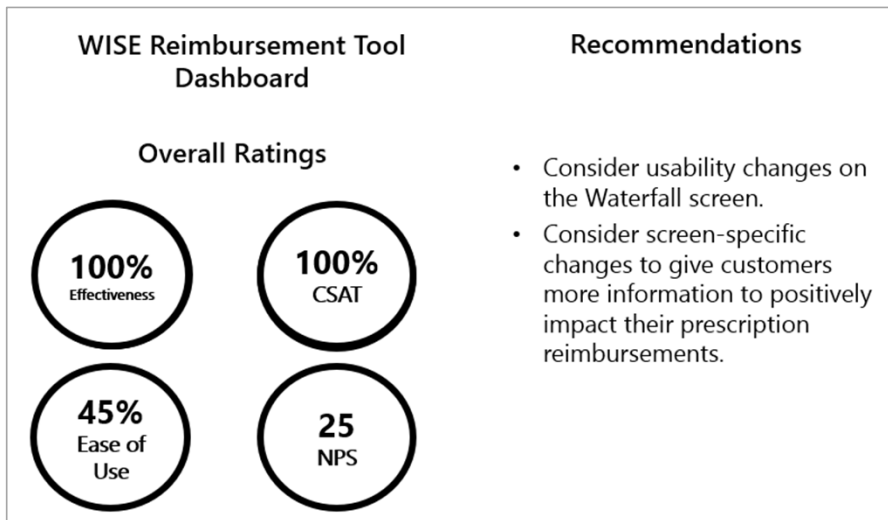
*Not all users answered all questions

What Users said:

- "The idea of having a one stop shop that has that kind of material – yeah I'll sign up for that and I might even pay for it"
- "The goal would be to look for areas of improvement. Everybody can improve"
- "If it is good, I would probably use it daily -- weekly... So, a snapshot if you will. Certainly, if you could make it where you could pick a specific range. I would want to look at a specific plan for a specific range to tie it into the performance program or tie it in with a GER period (date range). That would be most ideal"

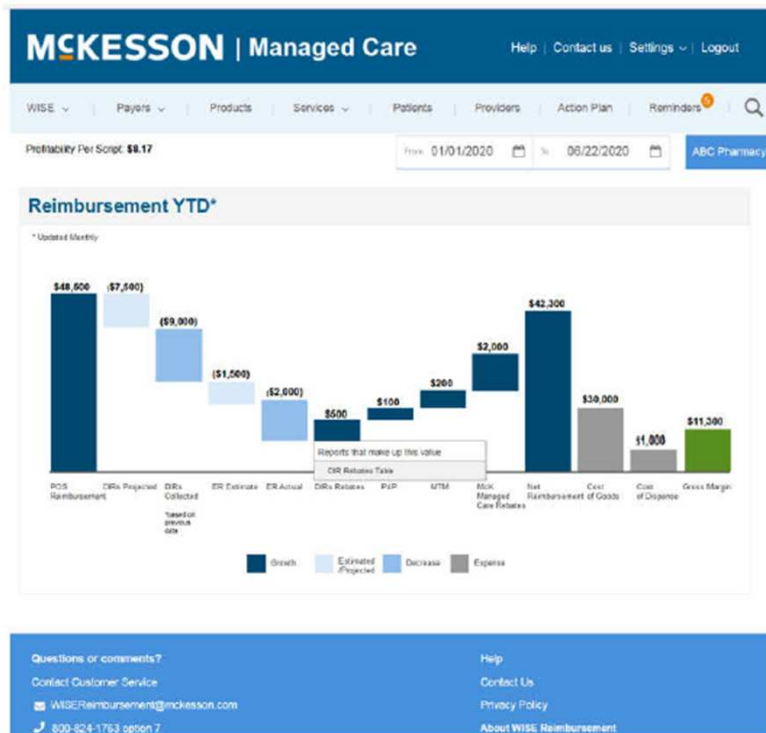
Unmoderated Usability Testing Using Userzoom Results Report and Videos

I scheduled a Test Results meeting to report the findings and review the videos. The pharmacy owners offered detailed improvements for the dashboard.



- Improvements**
- Add Effective Rate Reports
 - Add how my pharmacy is trending on a month-to-month basis
 - Ensure charts are drillable into detailed information
 - Display explanation for terms
 - Display metrics used for totals
 - Display overall profitability per claim
 - Display profitability per script history
 - Define volume multiplier
 - Display profitability break out plan
 - Add Individual payer POS information
 - Add table with totals or roll over on charts with totals
 - View claim volume by total claims and by Payer
 - Make charts drillable
 - View claim volume by profitability per script
 - Training on how to use the dashboard

See WISE Dashboard Usability Test Results



This screen was nicknamed the Waterfall.

*Not all information displayed so percentages may not add up to 100.

MCKESSON

Task 1*

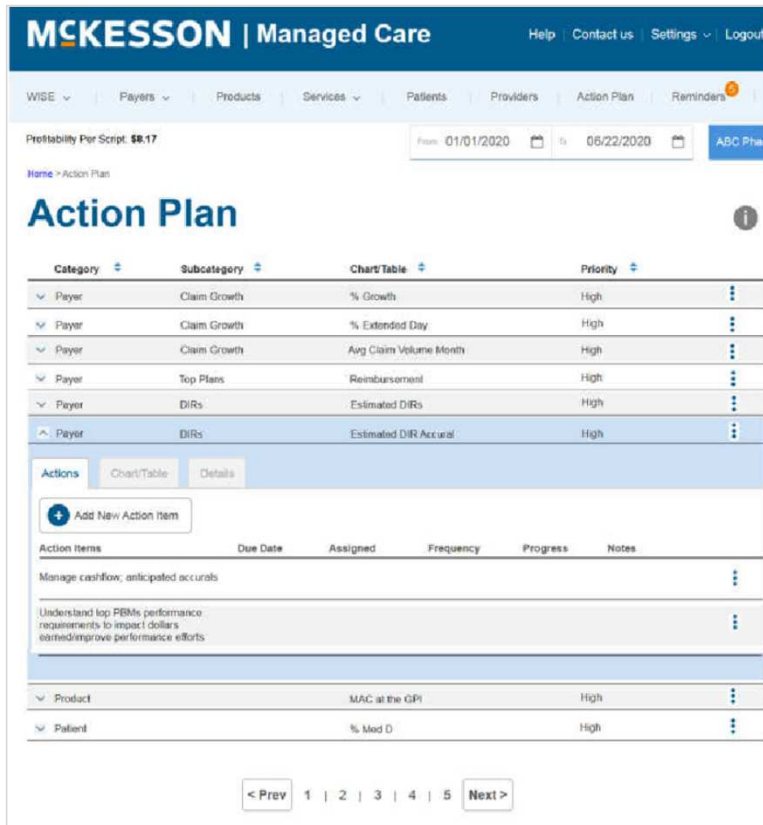
- 63% (24 of 38) Positive
- 21% (8 of 38) Missing Feature
- 16% (6 of 38) Usability

Usability Issues:

- Chart information is not clear
- Confusion understanding bar labels
- Not all bars have roll-overs
- More difference in waterfall colors

Recommendations for this screen:

- Do not mix total profitability and per script information on page
- Provide specific totals and equations used for waterfall chart
- Add costs and reimbursement to Underwater Claims
- Add Payer (NDC) information to Underwater Claims
- Add roll-over definitions on bars
- Aggregate by different lines of business
- Aggregate by top payers



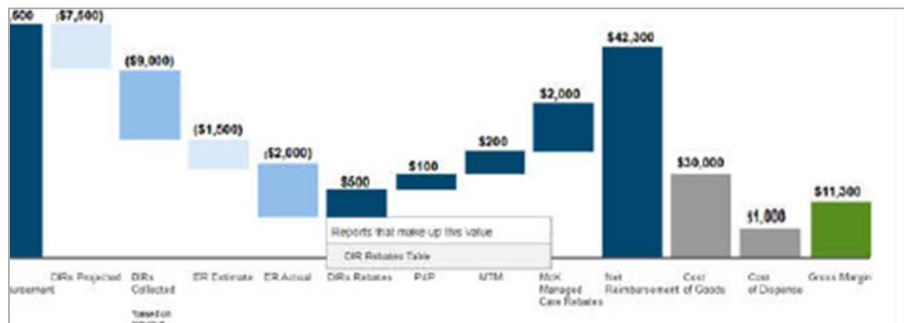
Usability Issues:

- Chart names/information is not clear

Recommendations for this screen:

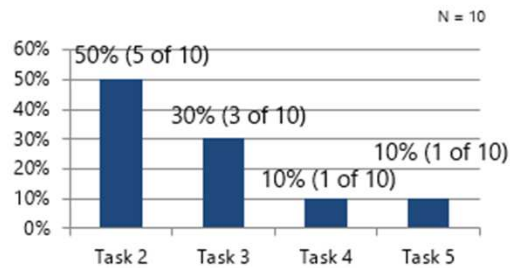
- Add table with total (#s) or roll overs on charts with totals
- Display overall profitability per claim
- Display profitability break out plan
- Display individual payer POS information
- View claim volume by total claims and by Payer
- Make charts drillable into detailed information
- View claim volume by profitability per script

Something interesting...



Find Answer in Waterfall

How many participants tried to find task answer in the waterfall chart?



When reviewing the videos, I noticed many pharmacy owners were looking for answers for other tasks on this screen. They eventually went to the correct screen, but I found this very interesting. I did mention this in the Test Results meeting.

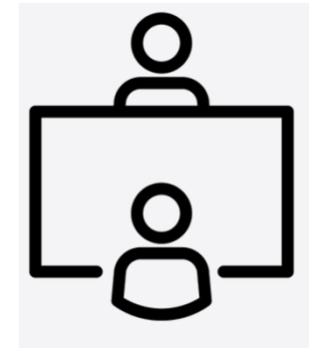
Pharmacy Owner Comments:

- “It wasn't clear where to find POS for ESI. I found Payers and data associated with it, but it would have been much easier to click on the POB graph (in the waterfall) to navigate to those plans contributing to that number.”
- “My first inkling wasn't to go to the menu bar (navigation) across the top, since the waterfall chart is so prominently displayed. I felt I wanted to be able to click on the waterfall bar that was for YTD POS Reimbursement to drill down to that specific payer.”

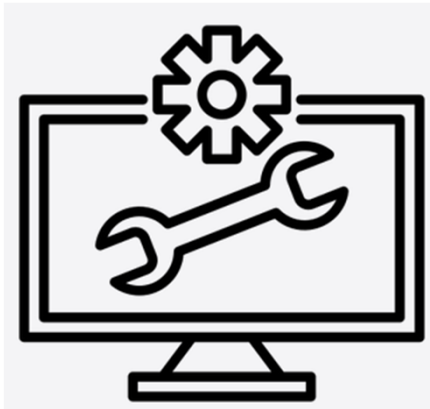


I met with the designers/developers after the Results meeting to review the usability issues identified during testing. I also emailed the product team the list of issues.

The product owners were always busy. They were booked in meetings from 9 AM – 5 PM almost everyday. I did manage to get a quick 15-minute meeting with them to review some of the issues I identified (see next slide).



How Might We?



Issue: Majority of pharmacy owners looked for information to answer questions in the Waterfall.

In addition to adding the pharmacy owner-recommended information to this screen, how might we make this page more useful?

Issue: The “Products” label was confusing

Are there other products to add this screen? If not, consider renaming it “Discount Cards” to ensure it is easier to find.

Issue: Chart names were confusing

How might we make the chart names easier to understand? Consider either a virtual focus group or user interviews to get information. Try to interview at least five pharmacy owners per method.

Issue: Chart information is not clear

How might we make the chart information easier to understand? Consider either a virtual focus group or user interviews to get information. Try to interview at least five pharmacy owners per method.



The dashboard was added to this product. I *think* it may have been added to other products as well.

As the healthcare landscape continues to shift away from the Fee for Service model to **value-based reimbursement**, independent pharmacies need a partner to understand, monitor, and improve payer performance. Performance has the most direct **impact on lowering DIR liability** and capturing additional Pay for Performance dollars.

This module was created to pull claims data from RelayHealth and PBMs to **estimate DIR collection amounts, provide actual DIR information and help pharmacies identify performance improvement opportunities to reduce DIR payments** and give visibility to additional available revenue. Using your pharmacy's actual data, you are provided with customized results specific to your pharmacy.

Improve Business Results

With our experience in managed care and contracting, Health Mart Atlas is focused on helping pharmacies identify the right opportunities for your pharmacy's unique needs.

- Health Mart Atlas participates as preferred in 62% of PDPs, which is the most among all PSAOs, including exclusive preferred access to select plans.
- Demonstrated by a 4.3% increase in claims and a 5.6% increase in claim reimbursement from 2017 to 2020.
- Streamline Managed Care Processes

What went well

- It was fun! I loved the idea that the company chose this project to help pharmacy owners.
- I was able to talk to several pharmacy owners to learn about their process and needs. Several pharmacy owners emailed me more suggestions after interviews and usability testing that I included in the final recommendations.
- The designer/developers were fun to work with. They wanted to learn more about UX, so we met every so often when I was building the prototype to review how I changed the wireframes and why. I did bounce a lot of ideas off them. And they were funny.
- I advocated for card sort and tree testing but due to budget concerns, the product owners did not want to do it.

What I would do differently

- Next time, I would like to do a presentation on the benefits of card sort and tree testing. They still may have said no, but they would understand the benefits and may decide to do one in the future.
- I would like to have scheduled more check-in meetings with stakeholders/product owners just to see if anything has changed on their end. I did send weekly status reports so they could see my progress, but I prefer more face-to-face interactions if possible – even if it is only 10 minutes.

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