GEMCARE WELLNESS COACHING PORTAL

Usability Testing

Gemcare Coaching Portal Usability Testing

August 7 – August 31, 2018

Supervisors and Admin Options

This section details the various options for Gemcare Wellness Supervisors and Admins.

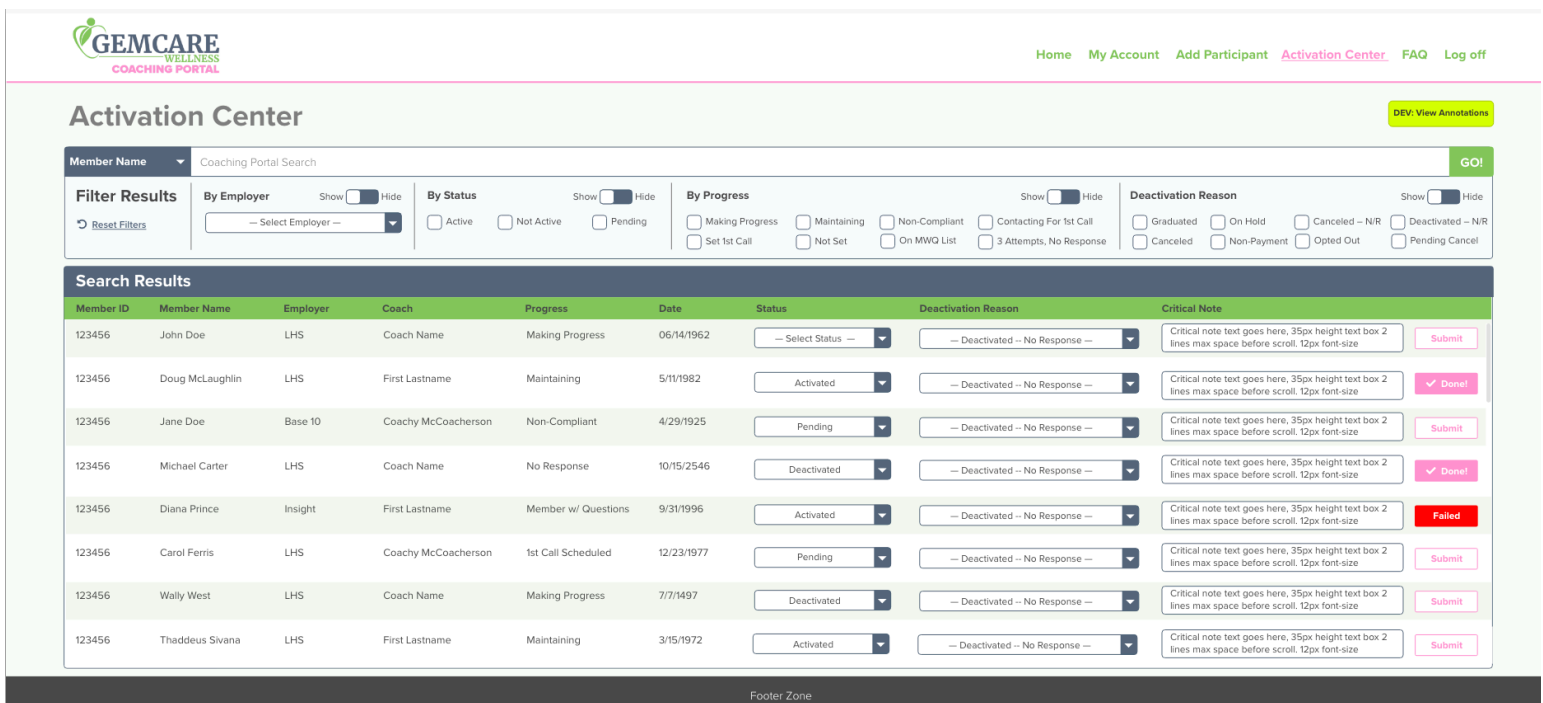# Coaching Portal Usability Report

Supervisor and Admin Needs

Problem: Member Activation Is Tedious

Activating and deactivating members requires going through several steps. As such, this takes up considerable amounts of time that could be spent doing more productive tasks.

Solutions

We will introduce a new section of the Coaching Portal called Activation Center. This is an admin-level feature that will streamline the ability to activate and deactivate members. You will be able to search and filter by company, status, progress and deactivation reason. You will also be able to generate a critical note and save individually. This will allow you to go down a line of things members that need attending to, rather than consulting a list, searching for the profile, activating it, etc.

A less information-dense version of Activation Center will also appear on every member profile page for Admin-level users.

Coaching Portal Usability Report

Supervisor and Admin Needs

Problem: Search is critical for Supervisors

Supervisors need a more efficient way to search members and filter by status.

Solutions

Similar to the coach search, Supervisors and admins will have access to a robust search page that can display all members on their team. This page will feature expanded options not available to Health Coaches, such as by team, coaching frequency and coach name.

Coaching Portal Usability Report

Supervisor and Admin Needs

Problem: Coach Audits Are Done Outside Portal

Conducting Health Coach audits are done by using a Word Doc and having the find a suitable candidate for auditing. The Supervisor then has to find the call, listen to it and grade the audit in a Word Doc, which gets intered into the system after the fact.

Solutions

Auditing can be done easier by integrating it into the Coaching Portal.

We will introduce what is called **Audit Mode**, which will automatically select a Health Coach's member to audit.

If the new VOIP phone system's capabilities allow for it, we will link directly to the saved call so the supervisors can listen to the Health Coach's call more easily. They will go down a checklist which will tally the score and submit it to the system.

Once a month, the system will update and the audits will be released so the coaches can see their scores on their My Metrics section of the Coaching Portal Dashboard.

GEMCARE
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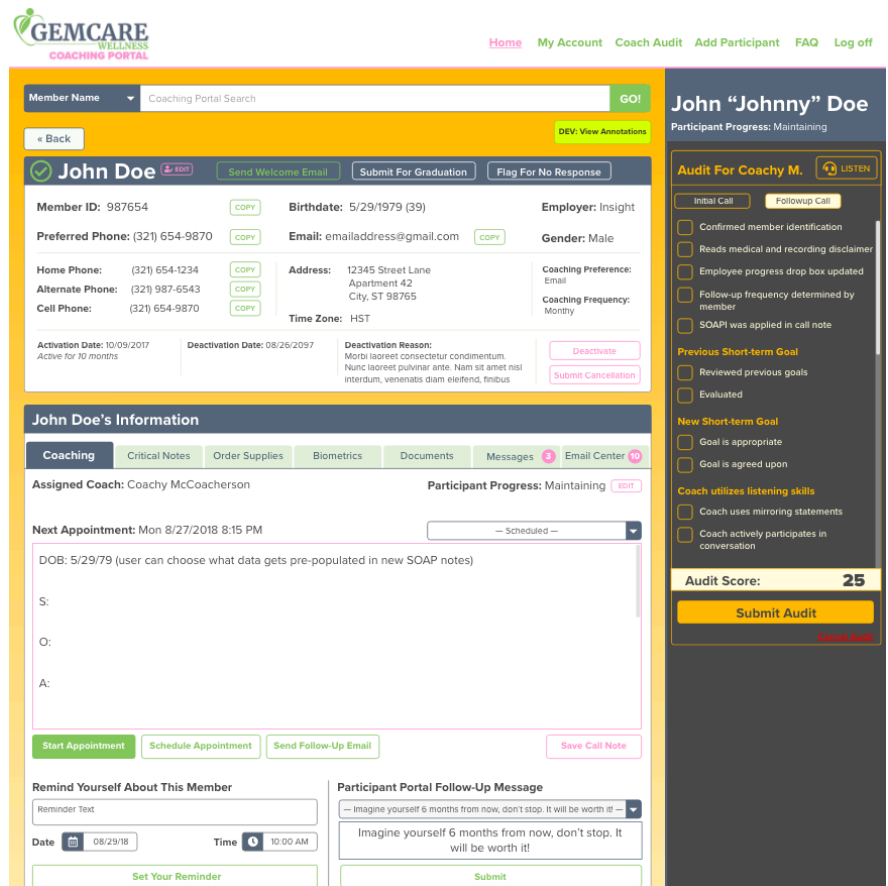
Coaching Portal Usability Report

Supervisor and Admin Needs

Problem: Admins Need An Easier Way To Manage Wellness

Many common features, such as adding participants, coaches, etc, must be done via IT request

Solutions

Implementing a management center option to allow for the adding of Health Coaches, new Participants, the ability to merge participants or to add a new company/employer.

Coaching Portal Usability Report

Supervisor and Admin Needs

Problem: Admins need see multiple levels of the company stats

Admins need an easy way of seeing how the company is doing on the overall level, how teach tem within the company is doing and how individual employees/coaches are doing within the company

Solutions

The Admin-Level dashboard will show by default the over all metrics. Through a series of dropdown menus, we will allow admins to drill down to view team statuses and then member statuses. We will also allow a direct search to pull up a coach's metrics.

Coaching Portal Usability Report

Supervisor and Admin Needs

Problem: Supervisors need to see thier team and members stats

Supervisors need a more efficient way to search members and filter by status.

Solutions

Like the Admin dashboard, the supervisor dashboard will operate similarly, just without the ability to see the entire company's overview and without a team member search bar. A dropdown list will contain all of that supervisor's team members. Once a Coach's metrics are pulled up, coaches have the option to view their dashboard, send them a reminder, conduct an audit or export the data into different formats.

Coaching Portal Usability Report

Supervisor and Admin Needs

Problem: Supervisors need to view several sets of data per coach

Supervisors need a way to view various sets of interrelated data regarding their coaches.

Solutions

We will display all the data in one tab on the supervisor's dashboard per coach. This data can then be filtered so easier viewing, comparing, etc.

The Call Log tab will allow Supervisors to select a date range to view call statuses, call outcomes, and minutes spent per call. This will be color-coded for easier scanability. It will also include an interactive pie chart that will also at as a filter when various parts of the chart are selected.

Supervisor Interviews

This section contains the raw notes from the supervisor interviews
conducted on August 26 –August 31 2018

Supervisor Interviews – Full Notes

Rob Pekare • 8/26/18

- Supervisors pull "random" reports. Pull a Calls Completed daily report.
- Admin dashboard should be a comprehensive report for the whole company. Should show calls completed, calls scheduled, etc.
- Needs a way to view coach teams and gage that progress
- There should be an admin view that is a level above supervisor view.
- Should be easy to view and pull information per coach and per team.
- Would like an easy way to add new employees
- Admin and supervisor portals should have filtration options like coaches have, but with more options:
- Options should include:
  - Call outcomes
  - Member progress
  - Biometrics
  - By start date
  - By team
  - By company
  - By time of day
- Admin view needs to be more 'macro'. Overall view of Wellness
- Data should be exportable
- Supervisors can pull metrics for their teams
- Admin should show coach-level, supervisor-level and overall-level
- Keep Pick up last SOAP note, but track usage

Laura Mayer • 8/26/18

- Search is very important to her
- Looks at Call Notes and Critical Notes daily
- Conducts a note audit once per month.
  - Checks for how notes are formatted
- Coaches contact her with questions or issues and she investigates
- Pulls a Wellness report, which includes
  - All members assigned to that coach
  - Shows the company,
  - Shows the last scheduled appointment
- Likes being able to filter options out
- Sidebar could correspond to the SOAP notes
- Would like to see an alert/reminder feature implemented.
  - Allow her to send reminders to her coaches
  - Coaches could also send reminders for themselves.
  - This would solve several problems that coaches expressed about followups.
- Wants the ability to view her coach's dashboards.
- Wants to be prompted to look at the dashboard when there is a problem.
  - Call queue alerts for coaches, for example.

Supervisor Interviews – Full Notes

Amanda Huscroft • 8/30/18

- Pulls biometrics reports, other random reports
- Pulls info for companies, usually once/month
- Has a small coach caseload
- Most information is on the server
- Search bar should be on all member pages for supervisors and admins
- Coach name should be included in search results for supervisor and admin views
- Would like the call audit to be implemented into the portal
- ring central calls are saved. Would like the ability to pause and resume the calls when doing an audit or listening to a call
- Calls are recorded from ring central. Is an audio file, not a transcript
- Prefers to listen to calls than read a transcript to hear tone, cadence, etc.
- Supervisor search should have a coach filter option
- Wants to see metrics by company
- Would probably need admin status. Rob would be super-admin?
- Wants to view coach data by provisionals and frequency
- Ability to pull coach call status reports

Rachel Laymon • 8/30/18

- Would like search bar to automatically detect if something is a name, ID, phone number or email address
  - If not, patient ID should be default search option
- Ensures all infor that a coach sends over to correct before sending that information to Liberty or other company.
- Add to Brightree feature only adds a person's name. Doesn't add any other relevant info. This has the potential to be a HIPPA violation?
- Daily recap per coach info should include:
  - View coach dashboard option
  - Other Communications tab
  - Dropdown of coach names
  - A button to link to that coach's dashboard
- Automate per account:
  - New patients, total patients
  - Number of patients and scheduled appointments
  - Ability to filter by last scheduled appointment,
  - by coach name
- Need a 'submit for cancelation' option for all coaches

Marissa Gelender • 8/31/18

- We need to have special log-ins for Liberty and other companies that ONLY show a list of that company's members
  - Clients MUST have ability to add patients.
  - An automatical email notification should be sent to Marissa if a company adds a member.
- Add 'pending' as status option to search
- Mostly searches for profiles for activation/deactivation.
- Having everything on one page would be easier and faster. Would be amazing.
- Could be laid out like a table:
  NAME | STATUS | TYPE v | REASON v | [C.NOTE txt box] [SUBMIT BTN]
- Admin-level deactivation section on member profiles
- Admin should have patient info automatically expanded

Mary Antonelli • 8/31/18

- Would like the ability to see +/- 1 week for her coach's schedules
- Consider adding way to have coaches communicate with their superviosrs within the portal.
  - Keep communications within portal as much as possible
- Show unscheduled calls tab on supervisor dashboard.
  - Dashboard should be filtered by coach
- Dashboard tabs:
  overview | Unscheduled calls * | Scheduled calls | Calls completed | Other communications | Cancelations | Graduations | Biometrics | Initial Call Queue * |
- Overview for coaches and search should be separate boxes
- Show uncompleted calls in Daily Recap
- In email center, protocol email should be type of email option. Selecting it automatically fills out protocol information
- Add personal Goal Weight and MD goal weight in Weight sidebar
- Show personal MD goals for other sidebars

Stephanie Ineman • 8/31/18

- would like a way to do audits on the coaching portal
- Audits box on Coach overview
- Email sent monthly to alert coaches that their audit scores have been updated.
- All audits are updated at once
- Randomly selects members to audit.
- Wants to see the number of rachout calls in the no-show queue
- Wants to see number of calls from no-show queue that were marked completed
- communications log w/ her coaches
  - Tie this into email center
- Remember to update the diabetes sidebar with fasting and postparandial option
- In to do list, a checkbox should be to remind coaches to update their member's medicine info
- Put calorie needs in weight sidebar
- ADD a nutrition sidebar
  - How many fruits per day
  - How many vegetables per day
  - How much protien per day
  Calorie needs
  - How many glasses of water per day
  - How often do they eat out info
  - Known food allergies
- On blood pressure sidebar, show overall average and beginning average to show progress. being made

Health Coach Usability Report

This section contains the raw notes from the Health Coach interviews
conducted on August 7 –August 172018

Coaching Portal Usability Report

Member Profile Pages

Problem: Scrolling is cumbersome

By far, the most mentioned issue in both the coaching surveys and in interviews is the amount of scrolling on the member profile pages.

Health Coaches find the scrolling to be tedious and a burden to productivity in order to be able to do their jobs most effectively. Ideas discussed to alleviate the pain of scrolling up and down included automatically collapsing sections, creating a tabbed system, hiding sections based on need and looking at what elements could be minimized or streamlined.

Solutions

We will be implementing a tabbed navigation system for the profile pages and dashboard to keep things compact. The goal will be to minimize scrolling as much as possible, with the most pertinent information easily accessible at all times.

We will also be streamlining various elements of the profile pages, such as the critical notes, call boxes, biometric data and more in order to keep the layout compact and and tight.

One of the main causes of scrolling is having items create a long list, which bloat the page length. This will be dealt with by putting certain content, such as critical notes, into scrollable windows. This will ensure that no matter how many items get added, the page length will remain the same.

Mockup of the tab layout that will replace the current sectioned layout.
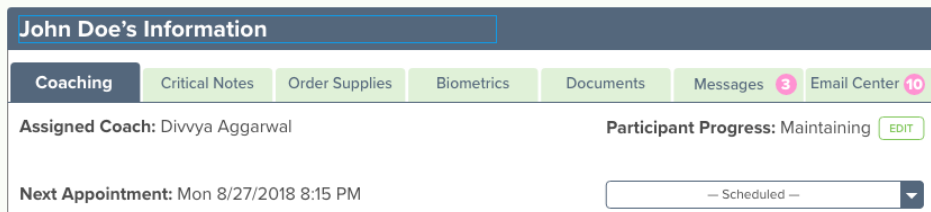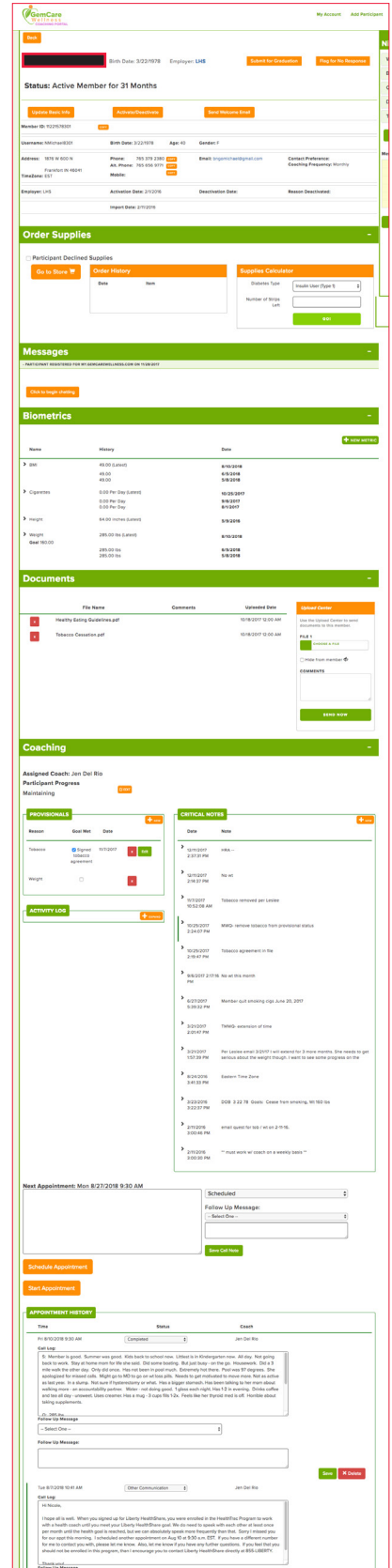
Screenshot of a random member's page demonstrating the length pages can reach

Coaching Portal Usability Report

Search Options & Member List

Problem: Health Coaches cannot see all their members
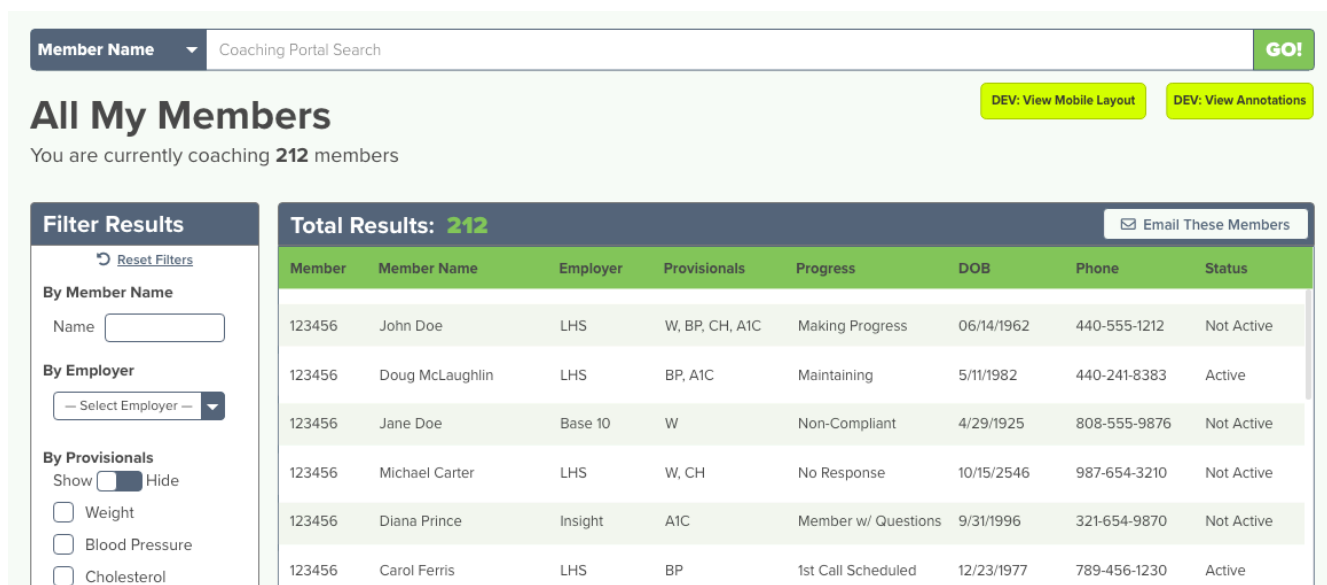
The Health Coaches repeatedly expressed an interest in the ability to see who all their members are and/or to have the ability to see which members are on for what provisionals. Currently, there is apparently no way to do this without asking a supervisor. Considering we have all this data, giving them this option should be relatively simple.

Solutions

Search ability should be greatly expanded in the revision. The search bar should prominently be displayed at the top, as well as in the members section. The updated search option should include the ability to search all of Gemcare Wellness or only the members on that Health Coach.

Health Coaches will also have the ability to view a list of all their members and filter them by various categories. Categories include by provisionals, by active status, by company, by age and by progress. Health Coaches will also be able to send a mass email to their filtered members.

Users with Admin status should have the ability to look up all members of a certain Health Coach.

Proposed member view page displays all Health Coach members with numerous filter options

Coaching Portal Usability Report

Appointment Tracking

Problem: appointments can be made more clear

The dashboard is primarily used by Health Coaches to look up their current appointments, but it does not change throughout the day. This creates a cluttered interface that slows down productivity. Additionally, rescheduled appointments are confusing and do not allow the user to know if the appointment has been reschduled or if it IS a rescheduled appointment.

Solutions

Appointments will be organized into a tab system. Using this layout, we can implement the following changes to the Coaching Portal Dashboard to improve productivity:

1. Completed appointments move into a tab called Completed Appointments. Completed appointments are removed from the main window. We will show whether or not a followup appointment has been made. An alert will be on the tab for every followup appointment not made.

2. Other Communications will now be tracked separately rather than be lumped into the list of appointments. There will be a tab titled Other Communications that will show various other ways Health Coaches have touched base with their members, including emails, phone calls and portal messages.

3. Rescheduled appointments to be highlighted in yellow and should clearly state that they have been rescheduled. For appointments that are reschduled, they will look identical to regular appointments with the exception of a clock/time icon beside them. This lets Health Coaches know at a glace that it is a reschduled appointment.

4. Coaches will have the ability to see their appointments from yesterday and their appointments tomorrow in addition to the current day.

Revised appointments box on the Dashboard

Coaching Portal Usability Report
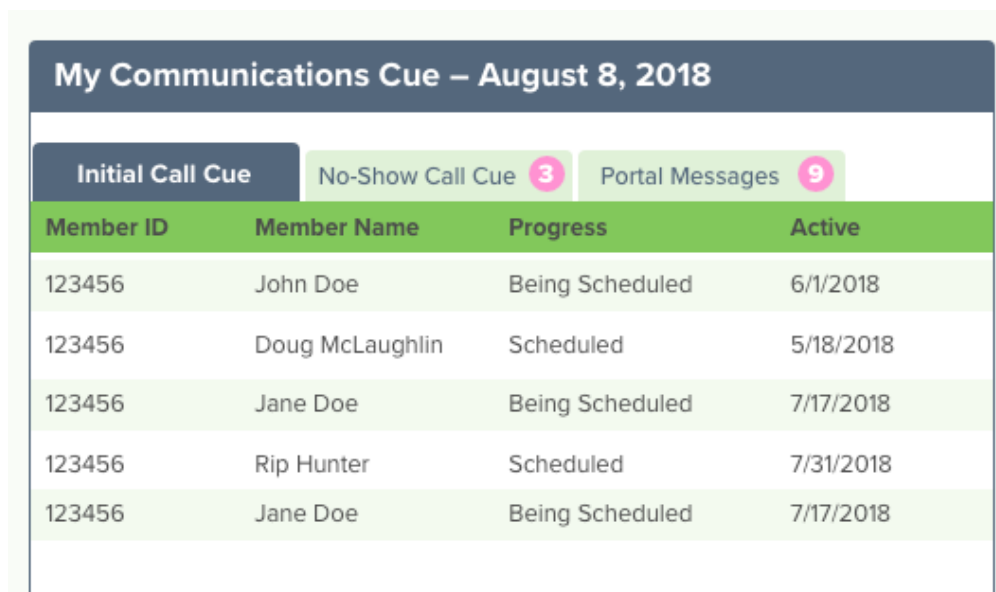
Communications Tracking

Problem: Health Coaches need an easier way to see their various communications

Users need a way to view their various other call cues + other ways they communicate with their members, such a via the portal.

Solutions

We will be introducing a sort of Communications Cue, which houses tabs for the initial call cue, the no-show call cue and portal messages. Additionally, the Other Communications tab discussed on the previous page could be added here instead of under appointments. This block would feature the notification system so Health Coaches know they have messages or something is in their various cues that needs their attention.

My Communications Cue – August 8, 2018			
Initial Call Cue	No-Show Call Cue 3	Portal Messages 9	
Member ID	**Member Name**	**Progress**	**Active**
123456	John Doe	Being Scheduled	6/1/2018
123456	Doug McLaughlin	Scheduled	5/18/2018
123456	Jane Doe	Being Scheduled	7/17/2018
123456	Rip Hunter	Scheduled	7/31/2018
123456	Jane Doe	Being Scheduled	7/17/2018

Coaching Portal Dashboard Communications Box

Coaching Portal Usability Report

Integrated Email

Problem: Many communications are done via email.

Many of the communications are done over email, rather than on the Participant Portal or some other way. Health Coaches are encouraged to followup with members by sending them information, reminders, etc. This is difficult to track and could be done better

Solutions

We will integrate an Email Center into the Coaching Portal that will encourage Health Coahces to stay in the portal more. This would presumably help lead to greater productivity gains in general.

Emails will be assignable for easier tracking of things like followup communications, appointment setting, etc. Email center will be available on the Member Profile page and show only the communications between that member and their Health Coach.

Health Coaches will have the option to CC or BCC, as well as a suite of full editing tools like bolding, italics, linking, and adding multiple attachments. Emails will automatically save in the event of a crash or system error.
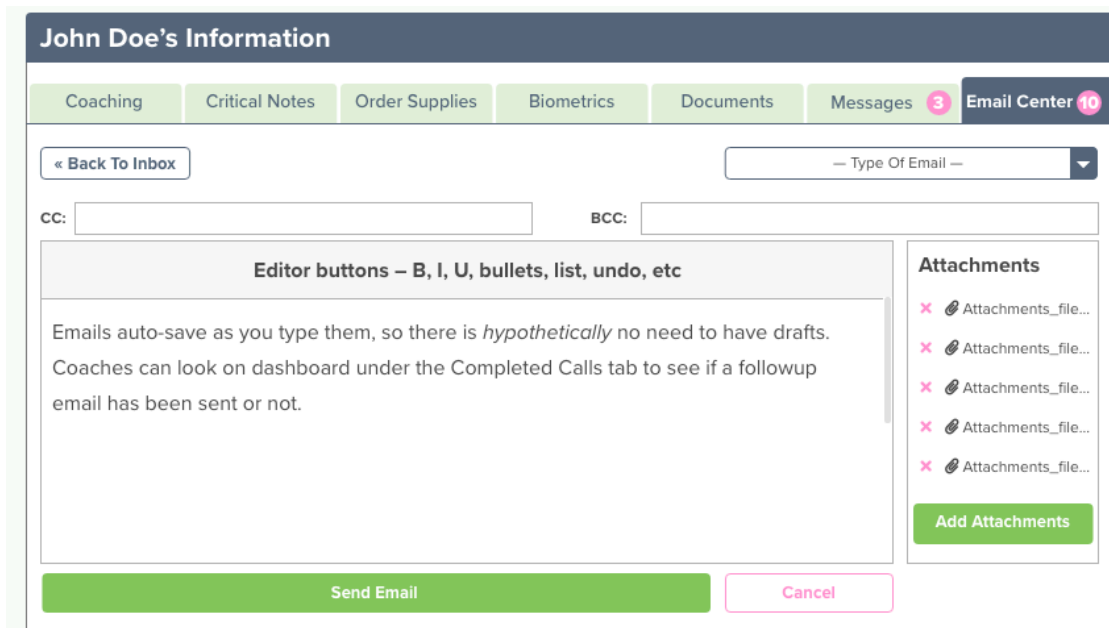
Email Center Mockup

Coaching Portal Usability Report

Participant Portal Relevancy

Problem: The Participant Portal is irrelevant to most members

In interviews, Health Coaches all said the Participant Portal was not relevant to their members. When asked why, answers all centered around it being a combination or average member age + being too busy to use "yet another thing".

Solutions

Solutions discussed to make the participant portal more relevant included:

1. Give members the ability to update their own biometrics. This would potentially lead to increased engagement on the portal.
2. A greater focus on nutrition and exercise is needed. Ideas include calorie counting, food nutritional information, exercise tracking, step counting, etc.
3. Creation of a Gemcare Wellness app. When digging a little bit deeper, it seems that members do engage with apps such as My Fitness Pal or Lose It. Modeling a hypothetical Gemcare Wellness app after these would be advisable.

Coaching Portal Survey Results

What are some words that come to your mind when using the Gemcare Wellness Coaching Portal?

1. Easy to use
2. fine. a lot of scrolling.
3. simple
4. Simple format, occasionally unreliable
5. straight forward, easy,
6. inefficient and incomplete,
7. Easy to use
8. Easy to use, Sometimes has some issues with scheduling
9. n/a
10. good, frustrating at times
11. Quick, effective, makes sense with the tasks of our day for the most part. Lots of scrolling and some wasted white space.
12. functional, simplistic, occasionally glitchy
13. i like the portal but there could be some updates.
14. Cluttered, Busy, Lots of scrolling!, Big boxes
15. Easy, Customizable
16. Better than last portal, but some cumbersome aspects.
17. Quick, easy, informative.
18. Organized, busy
19. Innovative, but not completely necessary when communicating back and forth between members. I prefer email personally.
20. simple, organized, nice color contrast
21. User friendly, basic
22. User friendly
23. lots of information in one place, constantly being improved
24. Nice upgraded features but still in need of updates to make the work day more efficient.
25. Easy for coaches, tedious for members; portal is smooth sailing and facilitates our workday, and helps us be more effective. However, the portal is not "user friendly" for members.
26. Easy to navigate
27. Slow (recently), organized.
28. Organized (I really like the fact you can view your day and the scheduled calls. I like how you can view from the homepage the number of calls completed, no shows, etc. It really helps for someone who like me who likes check lists), Frustrating (only on occasion when it‚Äôs not working or the ‚Äòerror‚Äô page pops up), Easy to use (The new options that allow us to flag for no response, submit for graduation is VERY helpful. It is one less task we have to do throughout our day)
29. Information center
30. Convenient
31. easy to use; all information in one place
32. medical chart
33. Organized, user-friendly
34. Easy, bright, information
35. easy, delayed, scrolling
36. there are lots of great things about the site, but if you are looking for improvements, I would say: too bright - the white is tough on the brain at the 8hr mark, too much junk at the top (the store, and msgs take up too much space, a lot of scrolling to get to the call boxes)
37. adequate, layout is not user friendly , continuous IT issues
38. Cluttered, Long
39. Easy, simple, functional
40. Informative, helpful, user friendly
41. Simple, quick, and Easy to use. Lots of scrolling.
42. Benefit for some
43. User-friendly, flows well, timely
44. overwhelming, too many steps that to not flow
45. cluttered, disorganized, simple
46. Easy, Green, Scrolling
47. Better than old, slow scheduling, useful, efficient, scrolling
48. inconsistent , long
49. gets the job done but not as efficient as it could be
50. specific, helpful
51. Cheerful, bright colors, relatively easy to use/navigate
52. organized, user friendly
53. lengthy, a lot of scrolling
54. Busy, information/data, convenient and useful
55. Lots of information
56. Orange, members, list, scrolling, data
57. informative, simple, long
58. convenient, efficient, data-driven
59. busy, white (too much white space), organized, overwhelming
60. Lengthy, Busy
61. Organized. Easy. user friendly.
62. Easy
63. Easy, crowded

Coaching Portal Survey Results

What are some words that come to your mind when using the Gemcare Wellness Coaching Portal?

Coaching Portal Survey Results

How would you rate the Gemcare Wellness Coaching Portal?

63 out of 63 people answered this question

7.19
Average rating

► Hide detail

1	♥♥♥♥♥♥♥♥		23 / **37%**
2	♥♥♥♥♥♥♥		21 / **33%**
3	♥♥♥♥♡♡		8 / **13%**
4	♥♥♡♡♡		5 / **8%**
5	♥♥♡♡♡♡♡♡		4 / **6%**
6	♡♡♡		1 / **2%**
7	♡♡♡♡♡♡♡♡♡		1 / **2%**

Coaching Portal Survey Results

On the member information page, would you prefer to have all the section collapsed by default?

On the member information page, would you prefer to have all the sections collapsed by default?

63 out of 63 people answered this question

1	No	32 / **51%**
2	Yes	31 / **49%**

Coaching Portal Survey Results

Describe your daily experience working with the Gemcare Wellness Coaching Portal

1. I generally do not have any issues as far as the use of the portal
2. "over all ok.
   there are some frustrating things:
   not being able to copy and paste emails with the send/receive info.
   only have SHS/LHS an date of birth at the top of the portal. when starting a new appointment- this is the only time you physically have to save the note. Other times, just clicking outside the box will save the note."
3. On days that it is working, it functions really well.
4. I enjoy the ease of use with the portal but dislike that it doesn't update in real time with scheduleonce
5. It's pretty simple to use - I usually don't have many issues with the portal.
6. It is frustrating to constantly have to scroll up and down the page to click on buttons or read info.
7. I love that everything is online and documents are on members page. I go online daily to view my schedule and cross check with schedule once. I update everyones appointments for the day- rescheduled/cancellations. I also upload information sent via e-mail and documents.
8. No real issues on a day-to-day basis
9. I've gotten very used to the flow and location of everything. I find it rather easy to use.
10. Mostly happy with it until its time to schedule members
11. User friendly - not many issues or questions
12. The portal allows me to open up multiple tabs to prepare for my day to come. For the most part it fades into the background, allowing me to focus on my conversations with members!
13. satisfactory
14. While The Portal currently has many boxes/functions I generally only make use of the call note box, biometrics, and the scheduling function on a daily basis.
15. It's mostly good. I don't really have any complaints about it. It's easy to use, I think it's fairly efficient too.
16. Easy to document call notes with space available. Document notes on the note pad. Upload documents to the document center. Do not enjoy having to scroll through top portion of page. Supply store and message center take up too much space.
17. Most things run smoothly on a daily basis. I have a few functions I would like to see improved, added or removed but I like it for the most part.
18. It's good! It is a lot more organized than previous versions.
19. It works great on a regular basis. I think the flow of the layout is nice on each member's page.
20. The portal has been very reliable. Usually no issues with my appointments showing up in chronological order, making it very easy to stay organized thru the day. What few glitches that I have encountered are usually very easily fixable, i.e. a critical note not wanting to save so I just copy my note, cancel, and refresh the page, usually posts after the refresh.
21. Use it for SOAP notes, side notes and biometrics for members
22. Easy to use
23. Mostly positive, aside from occasional glitches
24. "Not too bad overall but very frustrating on two counts which significantly slow efficiency:
    1- Unable to view in a calendar format where by 'clicking' on a specific date allows view of all scheduled appointments and quick access to each appointments individual file.
    2- If by accident the wrong command was clicked (I.e.- cut, copy, paste), it is very easy to completely lose a note that took time to complete, vs having a simply 'undo typing' prompt as a word document does."
25. Smooth sailing
26. I have a pretty good experience working with the portal. Limited issues but sometimes technical errors occur.
27. Most of the time it works just fine. The majority of the issues experienced come from scheduling. Works terrible on iPhone or ipad, which I have used when my power goes out. Is there anyway to make it more compatible?
28. Overall, my exercise is great with the everyday portal use. I start my day by logging in and I like I can view my day and calls. I really like being able to compare weights and biometrics and seeing how far until the weight goal is met.
29. typically no issues, smooth process esp. with the biometrics on the side that make it easier to chart while on the phone with member.
30. I do not have any issues daily with the portal- I like how all my members information is in 1 place.
31. The portal works well. I take notes, input biometrics, and schedule on a daily basis. The only interruption to the day I may experience is with occasional scheduling slow-downs.
32. sometimes slow, have to scroll up and down, especially when verifying name/DOB-like chow we can chart of to side/keep notes. Uploading to portal sometimes takes too long. when scheduling from portal wish done key on same screen (don't have to scroll down)-miss it sometimes when working too fast
33. I find the portal easy to use and navigate. The layout flows nicely. It helps me keep track of my caseload and document efficiently.
34. It is user friendly, provides the capability to document what I need (call notes, additional notepad, biometrics, etc.)
35. I go back and forth a lot - in one record, then in another, sometimes while on a call. i scroll up and down a lot, esp. during calls. sometimes, if the record is log, there is a lot to scroll through.
36. when everything is syncing correctly with schedule once, it is great

Coaching Portal Survey Results

Describe your daily experience working with the Gemcare Wellness Coaching Portal *(cont.)*

37. "scheduling issues with pre-loaded info not populating
difficulty entering bio metrics at same time
searching for members is difficult many duplicate names make finding correct member tedious
"
38. Fine overall. Scrolling could be improved.
39. There are quite a few functions that I don't utilize but for the features I use daily, it is very user-friendly.
40. It takes some getting used to (a lot of scrolling/learning the different areas) but is very easy to use once familiar
41. Over all I like the portal and it is easy to use.
42. Only a few of my members actually want information
43. I feel the coaching portal is very user-friendly. As a newer coach, it was not too difficult to learn and the flow is logical.
44. I have gotten used to it
45. accustomed to it now, but if it were restructured based on how often each button, section were utilized i would spend less time scrolling to select the appropriate option.
46. I think it works great and has everything we need to get the job done. My biggest issue is scrolling so much!
47. Overall, the portal is so much better than the old portal. There are so many features that I like! I feel like I am doing a lot of scrolling and clicking, but that is hard to prevent. When the portal is down, whole day is ruined since we rely on it for all of our information and notes.
48. manageable
49. lots of clicking, scrolling, and opening/closing tabs
50. I do like that it is tailored to our work and purpose. It is user friendly and the auto save for the call note is great. I do feel like I am scrolling up and down a lot so I wish it would have a quick button/option to go/return to the top and then another to scroll to the most recent note.
51. My daily experience is relatively great! The only hang up I have is when I need to upload more than one document onto the portal. It's a pain to have to upload one document at a time... I hope a drop box or just the capability to select more than one document for upload is coming soon. :)
52. It is an asset while on the phone with members. Information is easy to find.
53. It works fine, I never have difficulties with it loading, etc. The part I get most frustrated with is that it feels like I have to scroll up and down a lot to see the pertinent information (biometrics, old notes, critical notes, etc.)
54. No significant concerns as I am used to using by this point in time - each to navigate with practice
55. I'm able to do my job efficiently using the portal and access all of the information I need. Sometimes accessing this information takes too long.
56. Overall it is nice to use, however I do feel I do too much scrolling within a members page
57. I enter information into the portal day in and day out. I never really have any issues or difficulties using the portal itself.
58. I love having all of the information in one place and the drop downs are great for keeping submissions/note writing efficient. My biggest complaint comes from the connection with ScheduleOnce and then not having the section stay collapsed when I have previously collapsed them.
59. Not sure what asking, but coloring is too bright for my eyes. I wear amber glasses and have my brightness turned down as much as possible to help prevent eye strain. Orange/green easy on the eyes, but too much white space. For most part, no technical issues.
60. Gets the job done, but not as efficiently as it could
61. Very easy to navigate. Easy to see where I left off with a member. Sometimes document section is slow to upload. It also won't let me upload multiple documents at once so that would be a nice fix!
62. Personally I feel it is really easy to manage and work
63. Overall good and easy to use. Having to scroll more up and down between information.

Coaching Portal Survey Results

What do you like best about using the Gemcare Wellness Coaching Portal?

1. Members can send messages and download things to us directly through the portal.
2. super easy to use
3. It is simple without excess clutter.
4. I think it's catered to the practice of dietetics without a lot of extraneous information.
5. It seems user friendly to me
6. I like that we can change the info we input. I also like that we can access member's BP logs and labs.
7. I like that everything is kept in the same place like our notes, documents and e-mails
8. "Copy function
   Note pad"
9. It provides a location to collect and store all important data
10. Call notes and critical notes
11. One of my favorite features is the "view detail" button on the home page so that I can quickly check my notes, rescheduled appts etc. @ the end of the day. I also like being able to quickly view member's progress during a call (i.e. anything that makes it easy to see multiple points of data at once - biometrics weight list, etc).
12. "I like the functionality of the biometrics section, how it allows a quick view of progress.
    The auto-save feature when clicking out of the text box is amazing."
13. I like the how I can see who I call for that day; the biometrics section;
14. "I absolutely LOVE the auto-save feature when taking notes.
    I also like how scheduling is integrated in The Portal and is relatively easy to use.
    The 'Member Note Pad' was a great addition!
    I also like that I can access The Portal from any computer."
15. It's really simple. There's nothing overly complex about it and I like the SOAPI format.
16. Call note space, note pad, copy function for phone number, email address pops up email box, Member name on scheduling page along with time zone—all great features to help with efficiency, therefore, contributes to overall "best" thing using the portal.
17. I like having the ability to add biometrics and then see previous inputs as well.
18. That the side biometrics panel scrolls with the page, the notepad feature, the email/phone number copy and paste function
19. The ease and flow of design. I love being able to see all the biometrics added (ex: weight), from when a member begins the program.
20. Everything is right in one place for each individual member. So much nicer than navigating through EMR records when I worked in a hospital!
21. Easy to use
22. like that it is all on one page, like that you can enter in biometrics on the side, the notepad is helpful
23. It saves all the information we need re: members in one easy to navigate place.
24. "Its speed unlike schedule once
    Visually appealing
    "
25. Like how easy it is to post Biometrics, write my SOAP note, consolidate the sections so I don't have to scroll through lots of info that does not pertain to each member, upload documents and info for members, etc. I like when members message me on the portal and following up with members on the portal past a call when I have uploaded information for them on the portal and want to message them about it, etc.
26. It has key information all in one place.
27. I feel like the information is very organized and I can quickly find what I need when on a call with a member.
28. the copy option on the phone number! YES!
29. Side panel for biometrics
30. I love being able to read my previous notes before I talk to each member- The auto save feature is a life saver!
31. I like that members scheduled for the day are easy to access / easy to scroll through past notes.
32. auto save features
33. Ease of use. Not too complicated and allows me to stay organized.
34. I like the email button that creates a new email, call note box is adjustable, biometric section stays stationary as you scroll, copy/paste feature of phone number.
35. It is easy, overall intuitive to use.
36. simplistic, easy to follow, organized
37. It does the job
38. Automatic saves
39. It's very functional and displays all the information we need for calls.
40. It can house a lot of information for each member
41. I can find all the member information in one place - including labs, logs, biometrics, etc.
42. Easy to find the resources thanks to Cindy organizing them and providing the index
43. I like how everything is on one page and it does not require opening different pages or tabs.
44. the touch screen
45. simple, self-explanatory
46. It's easy to use and we have everything we need for our members in one place
47. Easy to navigate, every button is useful, biometrics on the side which are easily accessible.
48. the note feature to remember things to talk about and the biometrics tracked
49. the side bar on the right- it doesn't move when you scroll around so

Coaching Portal Survey Results

What do you like best about using the Gemcare Wellness Coaching Portal? *(cont.)*

it's easy to enter info without scrolling to the top of the page

50. I like the way it is sectioned and easy to see/read information and add/edit info. I do like that biometrics section stays visible while scrolling down.

51. It's organized very well.

52. Banner on the right (biometrics and note pad)

53. Easy to navigate, everything on one page, home screen with days appts.

54. The ability to document data and view for members with just a click

55. Able to track biometrics over time, keep track of documents sent to the member, and take notes for my next call.

56. The homepage list of members with appointment times listed, the data entry on the side of the screen

57. I like that it's easy to understand what information goes where. It's easy to find any information I might need on a member.

58. being able to change participant status to submit for graduation/non-compliant, etc as it is all centrally located.

59. The biometric entry on the side.

60. Having everything in one place, mostly

61. Being able to scroll down and see what we've discussed prior calls.

62. how easy it is to input information

63. Easy to use copy buttons for email, member #; easy to access any information I need during the call and take notes

Coaching Portal Survey Results

What do you like least about using the Gemcare Wellness Coaching Portal?

1. Once in awhile it is slow, but most of the time that is due to scheduling software.
2. "\- Feel like I am doing „Äúdouble work‚Äù -attaching documents in the portal and sending email, and now creating a call note for the email that was sent
   - Would be nice to be able to email/text directly from portal.
   - Be able to go to the day prior or next day schedule just to make sure all notes are complete and all info sent to member, as well as plan ahead for the next day. (90% of the schedule is set 1 day prior, so it not being ""live"" does not matter to me)
   - Be able to search for member from multiple locations on portal- not having to go to home page of portal to search.
   - Attach multiple documents in portal at one time.
   - Be able to see when member last logged into the GemCare Wellness portal
   - I would love to be able to have access to a list of members - how many, what provisions, how frequently I talk to them"
3. It would be nice if the portal was able to populate the reasons for appointment cancellations and reschedules.
4. Scheduling can have glitches sometimes
5. I would have to say the multiple spots to put information - I feel like I am repeating myself as far as documentation goes. It would be nice to enter in the information only once in one spot.
6. I do not like how the biometric's section is set up. I takes longer than desired to look over the info therein.
7. There is usually an IT issue like the call note not updating, the appointments are not synced in "real time" so it makes it more likely I would miss an appointment (I would never- type A personality). There is also a lag time when I click on a members page- I have to wait for critical notes to load before typing in a call note. I have also accidentally flagged someone for no response when I meant to graduate because I clicked before the page finished loading and shifted.
8. It's compatibility with ScheduleOnce- this where I usually have problems.
9. There's a lot of scrolling through to do when navigating around the portal. Also some of the biometrics could be more specific (ie. can't change from number of cigarettes to packs or days to weeks, can't identify fasting vs postprandial blood glucose)
10. scheduling
11. Lots of scrolling :)
12. There is some duplication of work.
13. I wish BP readings were easier to enter. Multiple days vs one day at a time.
14. I feel that the current Portal is much too cluttered. There are too many boxes to scroll through to get to where I need to go.
15. I think there's too many things to scroll through between the top (where the name and information is listed) and where the call notes

16. start.
16. The space allotted for Supply store and message center. Not features used often and when you minimize the boxes they pop back open when the page saves or refreshes.
17. I wish the appointments were updated in real time or at least before 9 am since most of us start before then. I would also like to see blood sugars have more inputs available at a time.
18. The follow up messages. It is extra work, takes up more room.
19. Sometimes it is very slow, but I do feel it has improved quite a bit since beginning with the company.
20. It feels like there is a fair amount of double documentation. Like when I get labs, I have to upload them to the documents, have to enter individual biometrics, and put them in my call note to stay organized. There are a lot of individual tasks involved which are a little tedious, but I also understand the necessity of it so that I can stay organized and stats can be tracked.
21. Would like to input more information in other spots besides notes so I could find them more easily for calls.
22. The portal can be pretty busy and you have to scroll down and up quite a bit
23. scrolling.. and minimizing unused boxed (ex DM supplies for nondiabetic members)
24. As above with question #3.
25. How tedious it is to explain to members...confusing and wish more members would use it....period!
26. no particular dislikes
27. It has been really slow lately.
28. If a member uploads in PDF format and has a period in any of the title, it won‚Äôt upload correctly (I have notified my supervisor Steph about this issue). You also cannot upload complete e-mails from members without getting an error message.
29. n/a
30. Not having access to my data (number of members-ie. for tobacco, weight, or graduations etc..)
31. Takes time to add files into document center when uploading more than one. Would like to be able to select multiple and upload at the same time.
32. typing free hand- wish there were smart phrases or template to just fill in facts
33. The pages can get long. A lot of scrolling.
34. only able to enter 10 BP readings at once, once you enter tobacco use (per week, per day) it changes previous entries, no ability to enter personal goal weight.
35. On the main page, where my appointments are, the client name and telephone number doesn't show. i would also prefer it to update overnight rather than at 10am (as the portal did at a previous job.)
36. the time it takes to load the appointment slots

Coaching Portal Survey Results

What do you like least about using the Gemcare Wellness Coaching Portal? *(cont.)*

37. "See above issues
    having to change several drop down boxes and enter info in several areas "
38. "Scrolling
    Manual entry of biometrics (could this be embedded in the note somehow so that you don't have to enter twice?)"
39. Sometimes it feels very busy with information that isn't relevant to each member. I also dislike entering blood pressures but not being able to calculate an average from the numbers entered.
40. It does not update quickly/list of appointments isn't 100% reliable
41. On some member pages it takes a while to scroll from the top to the notes and back to other sections. A quick link on the side of the portal to go do different sections of their page would be awesome.
42. Not much on keto....the keto questions keep pouring in and we only have 1 handout on the subject.
43. It does require a lot of scrolling if the Member has been on the program for awhile.
44. Literally having to go from top to bottom making sure that nothing has been missed when entering multiple pieces of info for a member
45. cluttered, disorganized
46. Scrolling!
47. A lot of scrolling to get from one place to another. the documents box does not develop a scroll button after a certain amount of documents are uploaded, the box just keeps getting bigger. It can collapse but you have to collapse it every time. If you click begin chatting the message box is super large and does not go away/shrink even if no messages are sent. you have to collapse it and do that every single time you open a member page. Order supplies populates on every member page taking up space.
48. having the notes on the bottom and having to minimize all the sections
49. the biometrics section is not easy to quickly find information, it's listed in alphabetical order instead of grouped in labs that go together
50. I don't like that the biometrics doesn't auto-save (like the call note) and that it refreshes the page when you do save. It would be great to have the option/ability to upload several documents to the document center instead of having to choose one at a time.

51. Document uploads can be a hassle when there's more than one to upload at one time. The other downfall to the portal is that only one blood glucose value can be uploaded at one time within the "Diabetes" biometric section. Oftentimes, my members provide me with 5+ values and it would be great if the blood glucose entry was structured more like the blood pressure section where you can implement more than one value at a time.
52. Having to scroll down to call notes (biometric/message section is large)
53. Scrolling.
54. The "busyness" - but ultimately I am aware this is needed to include all data we input
55. Too many sections that I don't find useful for all members (follow-up message, orders, messages) and integration with scheduling often slow.
56. The scrolling in a member's page
57. I don't like having to scroll past long lists of uploads I've made for certain members and I don't like that I can't click and drag to upload files.
58. I am not a fan of the overall arrangement as it requires a ton of scrolling (demographic info at the top and notes at the bottom) I think moving the active note box up would be helpful and then having side tabs for the other sections that could be opened as needed would be helpful. I am also not a fan of the Member portal link as it takes up a ton of room on the screen and very few of my members use it- seems a bit of a mismatch given our patient demographic.
59. Would like Critical Notes to be separate so that I can minimize (-) it only without minimizing entire Coaching section.
60. How much information we need to sift through and still do manually
61. Color scheme. Biometrics- tedeous import setup. Not being able to upload multiple documents at once.
62. biometrics, I wish we could use more measurements regarding weight such as pant size
63. Entering BP in biometrics. I wish there was a space for the date so that you could enter multiple ones at a time. I have also accidentally typed in the wrong note or deleted a previous note, which was time consuming to fix.

Coaching Portal Survey Results

What are the most frequent tasks you do on the Gemcare Wellness Coaching Portal?

1. I use the portal for every member call, writing call notes.
2. type notes, attach emails, and education material
3. Appointment notes and biometrics.
4. Note taking
5. Taking call notes, updated biometrics
6. Typing in the call note and scrolling to find info.
7. Completing log notes, uploading documents and documenting a member reaching out (other communication)
8. "Typing in the call note
   Biometrics
   Scheduling"
9. Call notes and biometrics
10. call notes, biometrics, scheduling
11. Use View Detail, Member Note Pad, Biometrics
12. Charting, scheduling appointments.
13. writing notes, entering biometrics, uploading member documents to portal.
14. "1) Call note boxes
    2) Scheduling
    3) Entering biometrics"
15. Writing my notes from the call, scheduling appts, entering anthropometrics, entering critical notes.
16. Call note documentation, uploading documents, sending emails through email address listed on portal.
17. Write notes, update biometrics and schedule.
18. Update biometrics, write notes, upload documents, utilize email addresses
19. call notes, scheduling, utilizing biometrics.
20. Documenting call notes and updating biometrics.
21. Taking notes on member's calls.
22. Entering in notes, critical notes, and biometrics
23. entering biometrics and call notes, starting new call notes for emails now.
24. Copy and paste parts of a prior note to increase efficiency with creating a new note for the days calls.
25. All of our required ones...coaching call summary SOAP notes, Biometrics, etc.
26. Document coaching calls, upload labs, and update biometrics
27. Charting, scheduling.
28. biometric update
29. Biometrics, uploading files
30. Taking notes, entering biometrics, scheduling, email link
31. Take notes, schedule, update biometrics
32. schedule/reschedule notes, appointment notes, biometrics
33. Documenting in the call notes, adding biometrics.
34. Making call notes, entering biometrics.
35. updating member records, note taking, updating biometrics, saving documents to the portal.
36. chart in the call box, update biometrics and copy/paste the phone number
37. "taking notes
    entering biometrics
    "
38. "Record notes
    enter data"
39. Enter call notes, schedule appointments.
40. Call notes, uploading documents, adding biometrics
41. take notes, enter biometrics, save member labs/logs
42. Snacks, meal plans, IF handout
43. Schedule appts, write call notes, enter biometrocs.
44. type notes
45. completing call notes, scheduling option. i should update participant progress more often but forget because of its location in relation to scheduling and call notes.
46. Documenting notes, biometrics, scheduling, looking through old notes.
47. Type call notes. Schedule appointments. Upload labs and BP log to document center, and upload biometrics when necessary, make critical notes. Update basic info. Use member notepad.
48. call notes, progress, and update biometrics
49. type in the call boxes, update biometrics, update participate progress, write critical notes
50. Call note, biometrics, document center, critical note.
51. Writing notes, inputting biometrics, writing critical notes, and uploaded documents.
52. update biometrics, call notes
53. Notes, biometrics, critical notes.
54. Chart patient information/notes and enter biometric data
55. Taking notes, using the email function, scheduling appointments.
56. coaching notes, scheduling, data entry, updating progress
57. most frequently recording notes from conversations with members and uploading files into the portal
58. Note writing, using the member note pad for my to-do's for the member, updating biometrics, uploading documents (selecting multiple documents simultaneously would be awesome!)
59. "Call log entry
    Biometric entry"
60. Call notes, scheduling, biometrics, labs, critical notes
61. Document notes from calls. Make critical notes for documents sent.
62. mainly inputting information while client is speaking
63. Document call notes and other communication, upload documents- labs/BP logs, etc.

Coaching Portal Survey Results

What are the most frequent tasks you do on the Gemcare Wellness Coaching Portal? *(cont.)*

Coaching Portal Survey Results
Most important features:

1. I like the note pad for quick notes as well as the messaging between us and the member.
2. searching for members, list of member for the day, the note pad
3. Call logs and biometrics
4. Call notes, biometrics, member info
5. Having everything about the member in one place - address, phone #, etc. Being able to see all the call notes on the members even from previous coaches.
6. Tracking progress, completing call notes, and scheduling appointments.
7. Call notes, document center, MWQ lists, e-mail link
8. Email, scheduling, call note
9. profile, call notes, biometrics, critical notes
10. call notes, biometrics, being able to do everything on one page
11. Biometrics, auto save of call notes, view detail
12. data entry in biometrics section, call log section
13. i like the biometrics & member name on the side bar it is so convenient. and I like how the status changes automatically when I add someone to NRL or graduate them
14. Call note boxes, scheduling, biometrics
15. The SOAPI note and anthropometrics.
16. button for grad/NRL tied to spreadsheets, Call notes, time zones, copy phone number, email address availability, biometrics on right panel
17. Most important: biometrics, notes (making these work as efficiently as possible together). Also, a layout that provides minimal scrolling to gather pertinent information.
18. The phone number/email copy and paste function, document center, biometrics feature
19. Biometrics and call note section.
20. Link with calendar to automatically populate daily appointment list and the appointment history documentation.
21. Biometrics and call notes
22. call box, ease of scheduling link within the portal, updating biometrics during the call
23. notepad, biometrics
24. Ease in scheduling appointments through the portal that shows frequency of calls and members time zone. Ease in uploading members documents such as labs, pictures, etc.
25. Coaching call summary, SOAP notes; BIOMETRICS, Critical notes, etc.
26. Biometrics and call notes.
27. The bare necessities- Being able to chart and read past notes. Contact information for the member and reason for coaching.
28. biometrics, tab to submit for graduation and flag for no response (AWESOME!)
29. biometric side panel
30. Scheduling, saving biometrics/notes
31. Notes; Status bar (MWQ, making progres, etc.)
32. place to document important facts- nice if it were in block form to just fill in vs soap note which is outdated
33. Drop downs, buttons/links to copy phone # & send emails, pertinent member information easily visible.
34. call note box, critical note section, biometric section, buttons that add to NR, progress update.
35. i would like to be able to print the main page daily, like a schedule page. I would need it to have telephone number and client name (abbreviated). Could you pleas update the biometrics section. pipe tobacco is missing. Chol/HDL ratio is missing.
36. The call boxes, the scheduling button, the critical note section, the phone number copy/paste, the note pad
37. note pad, text boxes, biometrics (if it was more streamline it would be better)
38. Automatic saving of notes
39. Call note boxes, entering biometrics, scheduling appointments.
40. Call notes, tracking of biometrics/documents
41. Appointment notes, critical notes, member note pads, biometrics, documents sections
42. Those related to food intake since this makes the most difference in changing weight/health improvement
43. The call note, scheduling appts, biometric section.
44. love clicking the graduation button and no response. It is quick and simple
45. call notes, easibility of entering biometrics, scheduling future calls
46. The cope buttons are great, the post it is helpful too
47. Call notes. Scheduling, Critical notes, biometrics, document center for labs, BP logs, doctors notes.
48. having the name and birthday prominent at the top.
49. Call box, critical notes, participant progress
50. member note pad, biometrics, critical note
51. Note-writing, biometrics, critical notes, upload center.
52. phone numbers, emails, time zones
53. Notes/critical notes, biometrics, member note pad
54. Biometrics, patient progress, contact information, document center and note pad as well as whether patient is registered on portal (however much too small)
55. Call notes, critical notes, biometrics, scheduling.
56. coaching notes, progress, data, member information
57. i feel like the most important is the call box for notes from our conversations. the 2nd most important is the critical notes sections and/ or the basic information with members contact information.
58. Note writing, participant progress, member note pad
59. call log, biometrics, basic info, documents, critical notes
60. Call notes, scheduling, having documents there
61. notes section. biometrics.
62. advocating for the client, tracking progress, and documenting
63. Being able to copy email, phone # and member # to reduce human error. Having a secure place to upload documents. Being able to put member on MWQ list without having to write an email.

Coaching Portal Survey Results
Least important features:

1. all are useful
2. typing biometrics 2x. it get typed in note, and then added to another section. would be nice if the note was set up to pull the info directly to biometrics for reporting.
3. Activity log
4. Messages and notepad
5. I'm not sure - I feel like everything on the portal is needed. While I'm not a fan of having to repeat information in the call box and critical note and biometric section, I understand that it is easier to locate specific info when this happens.
6. Updating addresses, and I never us the follow up messages on the portal. Most members do not use the portal, so that section is taking up space.
7. Yellow note pad, follow up messages for member (I have not had anyone mention they have seen it)
8. ordering supplies, document center (until uploading logs/labs/pictures)
9. follow up messages, chat
10. welcome note; my members rarely communicate via the portal
11. List of unread messages, follow-up message to member (not many of my members are enrolled in the portal, unfortunately)
12. chat box, many of my members choose not to utilize this
13. I dont really use the "follow up messages" much. Many of my members are not signed up to use the portal.
14. Ordering diabetes supplies, messaging, follow-up messages
15. I don't think anything is unimportant.
16. messaging center, follow up message
17. The messages/registering for gemcarewellness.com has not been as successful as I think we had thought when it was launched. People would rather have emails. This therefore takes up a lot of space, yet offers little to me while using the portal. The supplies is also rather large and not used for every member. It would be nice to have it for only those that are eligible for supplies.
18. Ordering diabetic supplies since not applicable to all
19. The messaging center
20. Follow up message
21. messaging member, follow-up message
22. The amount of space that is unused such as the diabetes supply information for those not on for diabetes
23. follow up message, DM supplies (don't have many DM members)
24. Member messaging center- most members prefer regular e-mail communication. And the member note pad.
25. Hard to say anything is least important... I don't really use the "extra next call messaging" feature
26. The member follow up message feature
27. Messages feature with cheers for members. Also sending information through the portal. Members seems to prefer handouts to be emailed or mailed rather than having to login to the portal to view them.
28. I will be honest, I do not use the drop down follow up message. Mostly because a lot of members do not utilize the portal. That is

probably a fault on my end because I rarely encourage them more than once to sign up.
29.
30. I feel like they are all important but I have not got into leaving follow up messages as most members do not log in
31. Follow-up message (member's not seeing them/joining)
32. activity log, wow notes for those using portal
33. I find pretty much all of the information on the portal relevant. It would be nice to have a customized page for each member - message center if member is registered for portal, supply store box for only those members coached for diabetes and blood pressure.
34. follow up note box (I personally do not utilize it enough)
35. Messages from members - i've received little. Also, the new note pad feature i have yet to need.
36. the message center, the chat feature, the follow-up msgs
37. message center, employer info and import date
38. documents
39. Follow-up messages.
40. Activity log
41. Honestly the messages - most of my members prefer to use regular email, so I don't often use the message function.
42. Anything on exercise.
43. Diabetes supplies, messages and document section.
44. the little inspirational quote of the day. It is unnecessary and one more thing to do.
45. messages, ordering supplies, follow up messages
46. None
47. Messaging, Order supplies (non-DM members), document center for the purpose of education material to member.
48. the DM supply claculator
49. follow up message drop down
50. follow up message drop down options
51. Secondary messages of encouragement, note pad, order supplies, and messages
52. follow up messages, regular messages
53. activity log
54. Unfortunately messaging center as not utilized by name members
55. Ordering supplies, sending messages
56. messages
57. i feel like they are all important to some degree but I think the messaging center is the least important to me because I only have a small number of members who use that feature.
58. portal messaging (my members just don't use it)
59. Activity log, messages, follow-up message
60. Message center and follow up message (members don't seem to use this)
61. the chatting feature- members dont make logins very often and do not use the chatting feature.
62. n/a
63. Follow up messages under call notes- It would be helpful if the member got an email alert when there was a message sent on their portal.

Coaching Portal Survey Results

What tasks do you do OUTSIDE of the Gemcare Wellness Coaching Portal?

1. emails, notes
2. email, spread sheets (tracking what the portal is already tracking, we just don't have access to pull our own MWQ, NRL lists.)
3. Emails, to-do lists, education, spread sheets for MWQ, graduation statistics and time utilization.
4. Emails and research, to-do lists
5. I spend a lot of my day in Outlook - checking emails, making sure my list of members is correct. I also spend time updating my members spreadsheet based on grads, cancels, NRL, etc.
6. Emails, research, webinars, create handouts, and meetings.
7. E-mailing members, texting members, looking at articles/ products/ videos member send, researching the million supplements that members mention, researching the latest fad diet and coming up with gentle reasoning not to follow said diet/ or support, reading articles for topics, working on group projects for work, meetings, watching/ finding work outs that are verified, listening to motivation podcasts and reading books to help my coaching. Occasionally a CEU if it's during a free time
8. Email, spread sheets
9. emails, sending educational material, to do list, spreadsheets, sending and receiving texts
10. emailing members resources
11. Lots of e-mail; at least ~1.5 - 2 hours/day would be my guess. Paper schedule. Spread sheets for my own organization. Paper to-do list.
12. emails, spreadsheets, to-do lists
13. all of the above - emails, spread sheets, text messaging members, sending education, receiving documents from members and their doctors.
14. "\-Email
    -Research/compiling education materials/resources for members
    -Conference calls with teams via Skype for Business
    -Chatting with my supervisor and other coaches on my team via Whatsapp and/or Teams
    -Watching webinars/journal clubs"
15. Email, researching information for a member, reading, keeping track of TMWQ/MWQ, writing for the blog committee, working on CEU's.
16. Spread sheets to keep track of my members on NRL, Noncompliant, graduation, etc. Keep track of appts on paper calendar
17. Email, notes for emails to send and information to remember, calculate BP averages, nutrition care manual and calorie recommendations, information gathering for members etc.
18. Emails, read articles, look at MWQ spreadsheets
19. Email and spread sheets
20. Emails, checking my calendar in outlook, keeping excel spreadsheet of LHS communications, research, keeping individual task lists (some on computer and some thru handwritten calendar), organiz-

21. ing policy updates
21. Email members; do BP averages on excel sheet; keep track of MWQ, TMWQ, Cancels, Holds, etc...
22. use Word docs for keeping track of MWQ lists, emailing with members and coworkers
23. email, paper calendar, separate notepad for quick notes (emails to send, other notes to myself), research/CEUs.
24. E-mails, create paper schedules, create to do lists, data entry into spreadsheets, research information for members as discussed during calls, and assist in rescheduling member calls as needed.
25. Currently, no other tasks outside of main coaching work
26. Communicate and send information to members via email, keep a running list of graduations/other changes in members status, average out blood pressures
27. Send emails, read articles, create handouts, member spreadsheets.
28. research, e-mail, Schedule Once
29. Emails to members for edu and if they are a no show, excel spreadsheets to keep track of graduations, cancelations, no shows, etc.
30. Email educational materials/research. Keep track of graduations/cancels/NMP etc.. on spread sheets
31. Send emails, write to-do lists, spread sheet with members on member with question lists, research for members, utilize outlook calendar
32. look up info & send to members-they do not like the GC site since there is no notification when something arrives-rather check their EMail
33. I keep my own spreadsheet to track members. To keep track of my day to day to-do list, I use paper and pen. When emailing educational materials, I email my members through Outlook by replying to our "Appointment Confirmation" emails rather than clicking the link in the portal. I've had better success with my emails not going to SPAM folders by doing this.
34. primarily emails, creating email templates, paper to do list because I prefer to write down and cross off a list, research/reading.
35. documenting Team MWQ, graduations, cancellations - keeping track - crossing off when it is official. I save research stuff/recipes, etc. in my email for later during a call. I calculate blood pressures.
36. email, outlook calendar, meetings, spreadsheets for IMPACT, MTM, texting members via Ring Central
37. emails, spreadsheets, note taking, research on info
38. Email, BP calculations
39. Email, calculate blood pressure averages, keep my own lists of members with questions/team member with questions.
40. Emails (staff + members), resource sending to members, T/MWQ spreadsheet tracking, to-do lists, continuing education, team/coaches collaboration/meetings
41. Emails, spread sheets, research, calorie calculations

Coaching Portal Survey Results

What are the most frequent tasks you do on the Gemcare Wellness Coaching Portal? *(cont.)*

42. Checking email constantly, getting back to members, going back and finishing notes (probably the biggest being the late)
43. I keep a paper schedule, I also keep a to-do list for each member I talk to. I also send a lot of emails to Members.
44. emailing members, take notes, spread sheets, to do list, etc.
45. email, to do list, goals that i set after the CPS or discussion with my supervisor, making sure all my members have a scheduled appointment
46. Email, Track my MWQs members, write out educational materials to send that day, list any info members asked for
47. Email all education materials to members (aside from about 2 people), email inside company, committee work, to-do lists, keep track of appointments in appointment book.
48. email, spread sheets, schedule management, recipes and research
49. emails, daily schedule/paper schedule, to do lists, spreadsheets for tmwq, mwq, average BPs
50. email, excel spreadsheet for members, paper and pen note/to-do list, paper calendar/schedule
51. Emails, maintaining a spreadsheet of members, committee work, continuing education
52. emails, texts, cancel appts through SO
53. email, spreadsheet, to do lists
54. Email, committees, to-do lists, education materials, continuing education, forms for members, etc.
55. Email, work with committees, team work
56. emailing members education materials, texting members on RC, calculating members food logs
57. i send a lot of emails, i create educational pieces of information on word and excel, I keep notes on what information needs to be sent to who or notes on members that I might need to remember at the time of our next call, i keep a paper schedule, I do research on information for members, I track no shows, reschedules, cancellations.
58. email, lists of my submitted grads/cancels/non-compliants/holds, daily to-do list
59. email, web search, access shared drive/education
60. Emailing members, reschedules, saving labs to be uploaded, blocking schedule, research, texting members
61. EMAIL. webinars. resources- creating and reviewing.
62. emails
63. Emails, MTM referral, cancel or reschedule appointments, tracking Team MWQ on Excel

Coaching Portal Survey Results

Is there any information you would like to see in the Gemcare Wellness Coaching Portal?

1. members past labs if not already downloaded
2. able to send email from portal after calls
3. It would be helpful to see what height and weight information the member's submitted to LHS when they joined.
4. I like the info already in the portal
5. There isn't really anything I can think of.
6. Provisionals listed on the Today's Appointments page. Last Wellness Visit somewhere on the portal page. Diagnoses and medications section also on portal page.
7. I would like to see a response on the site for a member who is on any list. Or a notification. For example someone was approved for a hold- who/ when/ how long and then notified when they're off hold. Another example: tobacco - were they approved? for how long? It is very time consuming to go through the lists and verify. And again there is a risk of missing that I did get a response and didn't see it.
8. The actual member's phone number and not the phone number of the member who signed up (i.e. husband and wife numbers)
9. n/a
10. Yes - if every communication would go through the portal that would make everything so much easier - this included communications with Liberty: emails for members with questions and also the answers to these. Getting multiple spreadsheets each week and sending emails back and forth is not efficient and it would be much better if everything could be flagged and marked and pending through the portal and Mandy use this to look at what we need and answer through this. Emails take so much extra time when all of the info is already on the members profile, so we must retype this, send this, wait for the answer and then look up the person again and add this information. It would be awesome to have everything on the portal and to have Mandy look at this and eliminate the emailing totally.
11. List of all of my active members. Update of my "data" as a coach (minutes on the phone each day), graduation rate, etc.
12. It would be useful to have the relevant information from the member's application that triggered enrollment in HT—height, weight, medications, etc.
13. Would like to be able to get information FROM the site — see all of members and their current status (active, hold, on MWQ, etc.) along with provisional. would be nice to see members who need coaching calls still for that month.
14. Preloaded member questionnaires uploaded as a regular note as opposed to a critical note.
15. None.
16. Not really sure, seem to have good amount of info available
17. Meal/menu planners or calorie/nutrient assessment software or research article accessibility.
18. Not really

19. Yes. I would like to see how many members I have and also, have a list of people I have graduated each month and year to year.
20. Not that I can think of at the moment.
21. A place under biometrics to put medications the member is on so wouldn't have to look back all the time to check when they mention a change. Something we could date, list meds, so we could see changes.
22. I feel there is already quite a bit of information in the portal and adding much more may make it too busy.
23. None that I can think of at this time
24. Please refer to question #3.
25. Being able to group message members, ie send all members on a weight trac, a current resource or link to check out; being able to upload a link so it would actually "link" for the member to a resource; a WHITE BOARD in order to teach, educate, etc during calls; most of all, an easy straightforward way for members to be registered and have access to the portal on a consistent basis
26. I am not sure what other information can be added
27. Formula to calculate calorie needs. Maybe put the disclaimer really tiny on the top of the page where all the white space is next to Gemcare wellness logo. Will help to have it visible to help remind me to say it or in case I forget it.
28. n/a
29. Click and drag option to upload files (similar to emails)
30. I would like to have access to data- members that i submitted for graduation or no response or how many cholesterol member i have.
31. any of my members that don't have an appointment scheduled
32. a list of running STG, wts, BG, BP in chart form we can see at once vs scrolling up & down. Maybe can populate from biometric and daily note into that chart
33. An option to view the previous and following day's appointments on the home page.
34. Potentially having a "welcome email" or summary for each provisional that outlines LHS guidelines for graduation/participation on the HT program to send as a follow up/review to what we say verbally. It is a lot of information for members to absorb and it ends up being a lot to type out for every single member.
35. see above please.
36. its already very comprehensive, providing what I need to do my job effectively
37. eliminate emails and have ability to send all documents through portal to decrease the steps we have to do. Now we are being told to create a contact not counseled box and copy and paste emails to it which just makes the job more tedious
38. A spreadsheet of all of our current members in system so that we can click on their names and navigate to their information.
39. A list of our pending graduations/cancelations/noncompliant mem-

Coaching Portal Survey Results

Is there any information you would like to see in the Gemcare Wellness Coaching Portal? *(cont.)*

bers, etc.

40. Research database
41. It would be awesome if there could be a quick calorie calculator.
42. Keto snacks
43. A box to enter email messages would be convenient.
44. Not have to pick and inspirational quote of the day. Making sure the process flows when submitting for graduation or MWQ, etc
45. alerts if my members don't have an appointment scheduled, reminders to update participant progress, accessibility to my caseload, my statistics
46. At the push of a button see our person lists of members who are on MWQs for grad, cancelled, on hold, etc.
47. Research (which I now know we are trying out EBSCO).
48. when people cancel (before we call them and they ask why we didn't know), how many members we have and for what provisional
49. if at all possible the meds members are on, many members report that I should know their meds because LHS has them somewhere
50. During scheduling, I would love to be able to quickly view previous appts (day of the week, time of day) as a reference.
51. Unsure.
52. none

53. No
54. Medication list
55. More specific biometrics (blood pressure averages, total cholesterol:HDL)
56. no
57. not sure of anything
58. I would like the member's employer to be listed next to the note so for coach's with multiple accounts we can better differentiate without scrolling.
59. Member's application information from Liberty or an access button to review medical history. On initial calls, I'm told "I told Liberty that," or "Liberty has that information already."
60. A drug/diagnosis database
61. NO, if anything I would simplify it more. Seems to be repetitive- participant progress, critical notes, biometrics, and notes section overlap often and at times I am writing the same thing in multiple sections.
62. if there was a way to trigger that the client needs to weigh in next appointment. I know weigh ins are every 3 months, so if there was some kind of reminder for coaches to let clients know to get a weight for next month.
63. I would like to see the questionnaires they fill out for LHS that cause them to be referred to HT- more information for that initial call would be helpful.

Coaching Portal Survey Results

What features could be added to the Coaching Portal that would make your job easier or more efficient?

1. I cannot think of anything at this time
2. see #5.
3. It would be nice if the portal was able to populate the reasons for appointment cancellations and reschedules.
4. unsure
5. The only thing that would be helpful - but may not be possible - would be to find a way to link emails sent to members to the portal. That way its all in one place
6. Add a button on the left side of screen that will take us to the Today's Appointments screen. That will make it easier access instead of scrolling up to the top each top.
7. An IMPACT button to add to a list, app availability, clicking the number and it automatically calling, if I click No response on accident- letting me click it again and not have to re activate the member. Lastly a lot of members send me a list of blood pressures via e-mail and not in a document- it would be nice if there was a way to just copy and paste so it's in the document area without having to create something to upload.
8. Having the portal update at 8am and not 10am
9. calling directly from portal, more specific biometrics
10. Yes. The info above also applies to this question: If every communication would go through the portal that would make everything so much easier - this included communications with Liberty: emails for members with questions and also the answers to these. Getting multiple spreadsheets each week and sending emails back and forth is not efficient and it would be much better if everything could be flagged and marked and pending through the portal and Mandy use this to look at what we need and answer through this. Emails take so much extra time when all of the info is already on the members profile, so we must retype this, send this, wait for the answer and then look up the person again and add this information. It would be awesome to have everything on the portal and to have Mandy look at this and eliminate the emailing totally.
11. More coaching stats - motivating to see at the beginning of the day as encouragement to be better each day than the one before!
12. "Drop downs for long term goals (that would also be displayed on the member portal)
Ability for members to update their weight or add BP readings directly to the portal"
13. "To be able to enter multiple days of BP readings at once. And/or Average BPs right in the portal instead of in a spreadsheet then entering into the portal.
I would love to be able to know how many members I have...what they are on for, etc. For example, I have 230 members, 140 are being coached for weight loss, 100 being coached for HTN....etc.. "
14. Ability to change and fix the size of call boxes or have them automatically change size depending on the call status instead of having all the

boxes be the same size. For example, to document a reschedule/cancellation/no show we likely don't need the same size box. This could save scroll space when trying to reach other call notes with content, and the page would look cleaner as well.
15. Being able to enter multiple BP's from different dates with one 'save' click.
16. Critical notes needs to be collapsible, too, for some members page is longer to scroll through. Collapsing feature needs to be able to stay collapsed and not undone when refreshing page/saving etc.
17. Calorie calculator? Update the BS biometrics to input more at once, similar to the BP biometrics. Less space for the supplies and messages.
18. Maybe hot keys for the SOAP note or already having SOAP filled out in the notes section
19. .
20. I wish there were more spaces available to document blood glucose readings. Sometimes I will have a member give me like 6 readings and I have to wait for the biometric to save the and page to refresh after entering each individual reading. I also wish that there were a way to make different types of call statuses/appointment details look different. When I do a quick scroll thru of the recent appointments, I think that I miss calculate no shows/number of held appointments sometimes. For example, if I write to much in the call box or like copy/paste my email to a member after a no show, from a quick glance it looks like a completed appointment because there is so much writing in the call box.
21. A way to put in BP numbers and average them right on the portal instead of having to do it separately and then adding it into the portal.
22. There is nothing further I can think of that needs added.
23. None that I can think of at this time
24. Please refer to question #3.
25. All listed in previous question
26. Automatically calculating blood pressure averages
27. See above.
28. I wish there were more spaces to include multiple glucose readings. I have members that take twice a day. It would also be nice if you could specify AM and PM.
29. Cant think of anything at this time
30. See #9
31.
32. ideally audiorecorder lol. I focus on my typping sometimes I don't hear what they say-or I have to go back & listen to call.
33. I discussed this with Doug during our meeting. It would be helpful if members had automated emails or messages sent to them to upload blood pressure or weight updates to the portal or to me. Even a link to send a biometric-based reminder email or text to a member would save time.

Coaching Portal Survey Results

What features could be added to the Coaching Portal that would make your job easier or more efficient? *(cont.)*

34. ability to average BP readings, ability for coach to see weight chart/graph, new box for emails rather than "other communication" that is in a separate area or out of the way.

35. see above please. I am a maybe for #11.

36. a fixed "home" button so I do not have to scroll all the way back to the top of a member profile to get back to my home page. it would be nice if the home page showed whether the member is currently active too as part of the list, so its easily spotted. it would also be great if the portal kept sections minimized until physically maximized (example: I will minimize the "store" on a non-diabetic while I am on their page, but if I return to their page I have to minimize it again, so you eventually just stop minimizing and instead spend the day scrolling)

37. "see above
ability to see coaches name when searching members
search box populating info more accurately"

38. "Embedded in the SOAPI note, an option so that objective biometric information does not need to be entered twice.
Ability to lock member information so that as you scroll, you are still able to have access to name, employer, etc.
Collapsible note option or have default be to display most current 3-5 notes so that so much scrolling is not required"

39. A way to calculate blood pressure averages. It seems wasteful to have to enter several BP readings in the biometrics and then have to enter all 3 month's worth of readings again into the blood pressure calculator spreadsheet to get the average. It would be nice if it could all be done in the portal to save a lot of time.

40. Space to house resources/emails sent to members

41. "1. Quick links on the side to take you to different sections of the participants page - like notes, biometrics, documents.
2. DOB under the name in the right hand column.
3. The current days note box to be a different color than the old notes - show up orange or green. Leaving text black. just highlight the box.
4. On the ""Today's Appointment"" page it would be great if every other name could have a light green background - to help break up the page a little. "

42. LHS expectations explanation that we could email to members when we first talk with them.

43. An email box, it would also be nice to have the Member's correct contact information. It is often difficult to get a hold of the Member for an initial appt as the info is their Spouses.

Health Coach Interviews – Full Notes

Sherry Thacker, 8/13/18

- Likes Scheduled Once
- Uses a paper calendar
- Always copies her last note on the patient in the Call Note box
- Says she would like it if new appointment notes automatically followed the S.O.A.P. note format
- Would be nice if she could use Drag 'n' Drop upload feature for documents
- Coaches get email 'appointments' with progress updates. If member emails coach with progress update, that counts as an appointment.
- Overall, she wants more variety of documentation to send to her members.
- Asked if having a Wiki-style information center where coaches could add to it would be helpful.
- Company-wide "education committee" approves all documents to be used.
- Because of this, she does not think that a Wiki-like document library would be feasible.
- Wants to see how many members she is currently coaching.
- Would like filter options such as by provisional (tobacco, cholesterol, etc), and various statuses (graduations, no responses, etc)
- Wants a way to see how good all her members are doing. How many are maintaining, making progress, etc.
- Wants an 'omni-view' of all her members, to see how they're all doing and if she needs to adjust her methods in response.

Sherry Thacker's Word Cloud

Caitlyn Vaughn's Word Cloud

Health Coach Interviews – Full Notes

Caitlyn Vaughn, 8/13/18

- She never uses the View Detail page on the Dashboard
- On profile pages, but the member's DOB in the sidebar to use while confirming information.
- Option to give her members nick names, since some members go by different names and it is hard to remember sometimes.
- Wants Links in the sidebar to see past user-submitted documents. Difficult to tell who uploads what to her. Generic email sent.
- Says her members don't like using the Participant Portal.
- Her patients frequently do not understand that there is a difference between GCW and Liberty/Solidarity.
- Most of her patients don't sign up for the Participant Portal. Thinks it's due to age + 'another thing they need to remember'
- After thinking about it, she would like it if patients could enter their own biometric data on the Participant Portal.
- On profile pages, only show member name, DOB, phone, address and member ID. Hide all other information.
- Always collapse: Order Supplies, Messages, Documents
- For messages, she wants an alert icon on the profile page if it's collapsed + an email notice.
- Never uses the New Metric button
- Only show 1 line on Biometric section. Hide other data so it's more streamlined.
- Likes that it always shows the Goal weight in Biometric section.
- Would like to have a list of all her graduated and no response members in portal
- Would like a way to dismiss rescheduled and canceled appointments.
- Thinks initial members should be shown differently. Should be categorized differently somehow.
- Would like the document section to be organized by folders of provisionals (ex: weight folder has all weight documents to send)
- Would like a drag 'n' drop upload feature for uploading documents
- **BUG**: When uploading 2 or more files saved from the same email, all the uploaded files are the same. Duplicates whatever was uploaded first, basically. Has to rename and relocate the files together them to upload properly.
- Participant progress categorization is a pain point. Would like better options. Would like to see unused options be removed, etc.
- Non-Compliance opens 3rd dropdown with Non-Compliance, and adds this to critical notes.
- Would like all critical notes to be contained in a scrollable box.
- Thinks critical notes should all be collapsed tighter.
- Doesn't use activity log.
- Would like a section added to the sidebar for medications and supplements her members are taking.
- Would like for it to auto-fill/guess the medication or supplement as she's typing.
- When creating a new Call Note, it should automatically pick up the old note.

Mockup thoughts:
- Doesn't understand the point of the No-Show call cue
- Doesn't want the rescheduled or canceled appointments to be dismissible
- Thinks it's too busy. Her eye doesn't know where to look first.

Health Coach Interviews – Full Notes

Heather Fowler, 8/14/18

- Relies heavily on Outlook for tracking rescheduled appointments
- She also never uses the View Appointment feature. Easier to click on the profile page and get more relevant info.
- On Dashboard, should include the member company name (LHS, Insight, etc)
- Members are often confused by the mixing of Liberty and Gemcare
- Wants to see Participant Progress on the dashboard view.
- Participant Portal is not relevant to most members due to a combo of their average age + being busy.
- On profile, just show the member name, address, phone, age/DOB and member Id
- Lots of scrolling on profiles. Does not like that.
- Wants more fields for blood pressure.
- Put participant progress in sidebar and DOB
- Likes the idea of assigning members a nickname. Thinks it should also go in the sidebar.
- Would prefer the profile page information be split into columns. Finds columns easier to speed-read.
- Doesn't use the member notepad. Her eye is not trained to look there. This relates to her preference for having things in columns.
- Used to use something called EMR EPIC for notes at her old job. It automatically saved information into a database.
- CONSIDER breaking SOAP notes up into sections (text field for 'S', text field for 'O', text field for 'A', etc)

Heather Fowler's Word Cloud

Mockup Thoughts

- Thinks the mockup is too busy. Would prefer it if the top part wasn't split into 2 boxes and spread across the screen.
- Text could be bigger, row spacing wider. More air.

Health Coach Interviews – Full Notes

Brittney Widler • 8/15/18

- Wants a search bar at the top of the dashboard. First thing you see.
- Uses search well over 10 times per day.
- Management wants a way to document how coaches are sending communications to other members.
- Suggests having a second column called 'communications log' or 'other communications'
- Email sent, phone call, portal message, etc for types of communications
- Thinks Rescheduled status can be confusing on the dashboard. Sometimes it means an appointment has been rescheduled, sometimes it means it IS a rescheduled appointment.
- Uses the View Detail feature on Dashboard a lot. Loves it and can't live without it. Is surprised the other coaches don't use it more often.
- On profile page in top section, only show Name, DOB, Company, Phone and Email. Hide all the rest. Not pertinent.
- Collapse the Order Supplies section. Hardly ever needs to use it due to her members either already getting diabetes supplies and preferring to keep getting them that way mostly.
- Get the sense she might be uncomfortable pushing her members to buy from us, but she doesn't say that. More of a body language/facial expression thing. Could be wrong.
- Says her members never use the Participant Portal. Attributes it to email being easier.
- Says if the portal were a mobile app it would be easier to get members to use it. All have mobile phones and use apps. We're running out of time so I don't ask what apps. Argh.
- Would like to be able to upload multiple documents at a time, rather than one-by-one.
- Wants the ability to see a full list of her members.
- Would like to see a Daily Recap feature on the portal somewhere. Probably on Dashboard. Would show calls completed, number no-shows, cancelations, minutes on phone. Wants to be able to view previous Daily Recaps.

Brittney Widler's Word Cloud

Mockup thoughts:

- Very, very positive reaction to the mockup. Says she loves it.
- Loves the color coding.
- Does not know what the No-Show call cue is supposed to be used for. This seems to be a running comment. Is this a new initiative that will be rolled out?

GEMCARE
WELLNESS
COACHING PORTAL

Health Coach Interviews – Full Notes

Divya Aggarwal • 8/15/18

- Never uses the View Detail feature on the dashboard.
- Doesn't think much of the dashboard. It's just whats there. Says it could show more types of information, but doesn't want it to be cluttered.
- Quickly moves on the the profile page. Says her #1 used feature is that she copy and pastes her old notes.
- Thinks it would be "amazing, awesome" if a new SOAP note could automatically pick up her past SOAP note.
- All the scrolling is her biggest pain point. Way too much scrolling, especially when the member has a lot of critical notes or call logs.
- Really likes the sidebar. It's super convenient.
- LOVES the autosave note feature
- Order supplies should not show if member does not have diabetes.
- Thinks Upload Center should not be a sidebar. It should be a horizontal layout across the top
- Would really like drag and drop upload feature
- All boxes/sections should be collapsed, except maybe Coaching.
- Likes the idea of having an Action List to check off key things that need to be said during each call.
- In the call note, when selecting No-Show, it should be a smaller field because she doesn't ever type more than a few words. Doesn't need to be so big.
- Says her members never use the portal. She tries to push it, but they're just not interested. Thinks it's because "it's just another thing to to"
- Says she is unsure if participant uploads go through. She has had members contact her regarding the portal saying they're not sure if the file they uploaded went through or not. Just not clear enough.
- Thinks the portal would be better if it were more

Divya Aggarwal's Word Cloud

like an app. Suggests My Fitness Pal and Lose It for examples. Lots of members use these apps and say they wish they could send the data directly to her.
- Greater focus on exercise and nutrition could make the participant portal more relevant.
- For collapsed boxes, a notification system would be very good idea. Have the messages bar or Documents bar be collapsed but blinking. Or have a notification icon like a number in a red circle or something.
- Divya talks a lot and very fast. Lots of ideas. A lot of them are already going into the portal so I'm not necessarily recording them just so I can keep up with her.
- I really wish I'd recorded this one.
- Uploaded questionnaires should automatically be put through as call notes.

Health Coach Interviews – Full Notes

Divya Aggarwal *(continued)* • **8/15/18**

- Wants windowed scrolling instead of endlessly long boxes.
- Always show the member's goal in the critical notes at the top.
- Should rethink what shows in the Call Box based on the type of message.
- Says we should hide the Use Followup Message if they're not registered on the portal. This is a smart idea.
- Could also hide the messages section if they're not registered on the portal.
- We are discussing laying out the member profile page as tabs instead of collapsible sections. She really likes this idea.
- Says Critical Notes should be it's own tab.
- Accidentally presses the Submit for Graduation button a lot.

Mockup Thoughts

- Thinks the mockup is too busy. Would prefer it if the top part wasn't split into 2 boxes and spread across the screen.
- Text could be bigger, row spacing wider. More air.

Health Coach Interviews – Full Notes

Nicole Dannemiller • 8/16/18

- Wants to see a search bar to the top of the dashboard.
- Likes the simplicity of the dashboard.
- Doesn't use the View Appointment feature
- Profile pages are too busy.
- Only show member ID, phone, email, DOB and Time Zone

Nicole Dannemiller's Word Cloud

- Would like a cancellation button for people who cancel their Liberty membership. Says she would use this somewhat frequently. At least a few times/week on average.
- Sidebar for other features on profile such as the Diabetes store and documents. Basically thinks there could be 2 sidebars.
- Activity Log should be hidden/collapsed
- Show starting weight and other starting provisionals in the Biometrics section
- Give coaches the ability to set a new starting weight/provisional, like if they reach a goal and want to keep going for example.
- Show the disclaimer somehow.
- Prepopulate the SOAP notes.
- S should be blank.
    - O should pick up previous note's info. Would be even better if the sidebar could populate the O automatically.
    - A can be blank
    - P should include at least the short term goal (STG)
    - Says members don't use the Participant Portal due to age.
    - To make the participant portal, they should be able to track their food and exercise.
    - Should have a meal plan center
    - It being a mobile app would help people to use it more
    - Mobile Apps are better. Suggests Myfitnesspal and Lose It
    - Should have a much greater focus on nutrition, as this is what members as about a lot.
    - Give members the ability to enter their own biometric data via the hypothetical app.
    - On sidebar, Family History shouldn't be a checkbox. It should be a Yes or No. Once selected, it shouldn't really be changeable.
- Likes the idea of having a nickname. Would definitely use it.
- On the sidebar, when opening a new section, the old one should close automatically.
- Thinks the portal should generate their calorie needs. Members frequently ask about this.
- On profile, collapse old call notes into single lines.
- Does not like the gray text. Thinks it is hard to read. Darker text.

GEMCARE
WELLNESS
COACHING PORTAL

Health Coach Interviews –

Amber Sommer • 8/16/18

- Doesn't use View Details feature
- Search at top of dashboard.
- On search, put the coach name in the search results
- When clicking back button on Search Results, the results stay. Should not reset.
- Show provisionals in the sidebar of profile page.
- On profile page, most pertinent info at the top is member name, age, DOB, phone number and time zone and member ID.
- Participant portal would be more relevant if members could enter their own biometric data.
- Likes the idea of having an email center in both the coaching and participant portals, but is content to use Outlook.
- Participant portal should more prominently show their goals.
- On sidebar, enter member's exercise – enter their Exercise type, Frequency & Duration
- On sidebar, add a section to record what they're eating and display data.
- Hide the diabetes store if the member is not diabetic.
- Hide messages if they're not on the portal.
- Likes the idea of having a to Do list with a list of all the things they get audited on.
- To Do List can include:
    Verify birthdate, SOAPI notes typed correctly, Update biometrics, Remind them to register for the portal
- Coaching portal should have more focus on nutritional data. Would like for it to calculate calorie needs. Suggests nafwa.org/mifflin.php or *Harris Benedict calculation*

Amber Sommer's Word Cloud

- For the sidebar
    Add AM/PM option for diabetes blood pressure, Cholesterol ratio
- Lay out diabetes section like this

A1C	+ NEW
Date	+ NEW
Glucose	+ NEW

⦿Fasting ◯Postprandial

New Date creates Date, glucose & radio buttons. Glucose creates new glucose and radio buttons

- Tobacco sidebar:
- Type of tobacco use should never change.
- Using a free replacement? Question should include 'what kind' if selected.
- Have 'Type of tobacco use' frequency (ex: cigarettes - how many per day/week/month?)
- **BUG:** Changing the frequency automatically changes all past records.
  This should not happen and makes no sense.
- Show provisionals in sidebar
- Basic info about member should include spouse and occupation
- Hide the followup message if they're not on the portal.

Health Coach Interviews –

Jen Del Rio • 8/17/18

- Very very organized. Has a lot of thoughts and good ideas already written down that she wants to discuss.
- Wants a feature on dashboard: Followup appointment made: yes/no, to ensure that all followups are completed.
- Wants to see less spacing on the dashboard. It should be tighter and more information-dense.
- Scrolling on the member page is a huge pain point.
- Add a section under the member profiles for 'additional call attempts' to keep track of followup calls made.
- Wants to combine blood pressure on profile biometrics. S/D should be one thing, instead of 2 separate readings.
- Sticky header or persistent back button would be nice
- Include pertinent info under biometrics, such as last lab work done, last doctor visit date, diagnosis and medications currently taking
- Have a section that tracks handouts sent, possibly in documents?
- Scheduling page should have no scrolling. Make information rmore condensed.
- Show the city on the schedule page
- Would be nice if they could show like a news ticker or something so she could ask them about the local news.
- Wants the ability to search and filter her members and send them all a mass email.
- Wants to see calculated calorie count information on the portal.

Jen Del Rio's Word Cloud

Mockup Thoughts

- Very positive reaction overall. Almost all the things we just talked about are featured here. Jen is very good at this sort of thing, actually.
- Track minutes in the Daily Recap
- Under expanded metrics information, explain what the metrics are and how they're calculated, when they're updated, etc.
- Wants to see a completed appointments tab added
- Likes the to do/action list. It should have the following list items to check off throughout your call
    - Update progress
    - Update metrics
    - Update scheduled drop down call note status
    - Are your SOAP notes complete?
    - Did you offer educational material?
    - Repeat disclaimer
    - Verify DOB
    - Go over member's previous goals
    - Establish new goals
- Wants to show long term goal in critical notes tab

Health Coach Interviews – Full Notes

Julia Kaesberg • 8/17/18

- Doesn't find the homepage/dashboard to be very relevant. Uses it as a list. Not sure how it could be more relevant.
- Mentions she got an email saying a member updated something to the portal, but the email did not say who uploaded it ir what the document is

Julia Kaesberg's Word Cloud

called. This is not useful at all.
- Scrolling is a major pain point. Wishes she didn't have to scroll so much.
- Julia always looks at the most recent call note, but doesn't really copy/paste. Just prefers to memorize it.
- Likes the ability to give people a nickname. It should replace their real name if you can't display both.
- Thinks coaches should be able to expand the full-

width text boxes.
- Add more fields in sidebar to the diabetes blood glucose section.
- Does not see the need for having the activity log.
- Likes the notepad and uses it a lot.

Mockup Thoughts

- Wants to see the provisionals under the coaching section. Doesn't know where, but wants to be able to see them.
- Likes the email center idea
- Likes the To Do list idea. Says it should show:
  - Confirm DOB
  - Confirm last name
  - Read disclaimer (have pop up modal)
  - Go over past goals
  - Set followup appointments
  - Update biometrics
  - Offer education
- Thinks the Participant portal could be made more relevant if it had a 'what you're eating section', where members upload their meal plans and can get calorie counts, carb counts, etc
- Agrees the participant portal would probably work better an app.Mentions Myfitnesspal and Lose It as some of the ones her members use.
- Should be able to send their biometric information through this hypothetical GemCare app
- Messaging feature could be expanded in app and would probably get better engagement. Option to send an email is good too.

Scratch Pad & Notes

Scratch Pad & Notes

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