

**amity**  
Here for you

# AMITY PATIENT ENGAGEMENT PORTAL

## Pre launch user testing



**Cheshire and  
Merseyside**  
Health and Care Partnership

MINDWAVE

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# INTRODUCTION

This report was commissioned by Cheshire and Merseyside Integrated Care Board to user test the newly developed patient engagement portal “Amity”, prior to hard launch with representatives from several key user groups.

During this stage, we looked to ensure we had met user needs across each user interface, for the delivery of a good user experience, before going live.

The following pages summarise the participants, key activities undertaken in testing and offer actionable insights as short term and longer term recommendations.

# CONTEXT AND BACKGROUND

The Amity Patient Engagement Portal supports self-management of physical health, and mental wellbeing of patients in the Cheshire & Merseyside region. Following discovery with 12 patients from the region back in 2020, the platform has been built with stakeholder guidance, and is set for launch. Four user interfaces have been built and made available to ensure cross functionality between user groups. The clinician view requires testing, but the interfaces tested include:

- Patient interface
- System admin interface
- Trust admin interface

Usability testing was undertaken with a total of 5 users across 3 user interfaces in order to verify functionality and provide a clear understanding of the purpose of each feature.

# PARTICIPANTS

As part of our usability testing, the ICB provided the following participants for testing:

- 2x Trust admins
- 2x Patients
- 1x System admin

# METHODOLOGY

The five participants engaged in moderated, remote user testing via a video conferencing call, where participants screenshared their actions and responses to various tasks and questions.

The interview entailed the user sharing their screen whilst we took notes and recorded each session with their consent.

Responses were recorded and saved for later analysis. We asked the participants a range of questions about different functions on the platform such as “What are your first impressions of the platform?”

We also gave participants an opportunity to provide their overall opinion to determine how efficient and usable it is for them specifically if they chose to do so.



# INSIGHTS

## PATIENT INTERFACE

Key features and functionalities were examined to gain necessary insights to help discover any gaps within the portal and any opportunities for further refinement.

This included:

- Logging in
- Dashboard
- Questionnaires
- Trackers
- Resources
- My health

### **Logging in**

- Patients found this to be more straight forward and more convenient than the NHS login that some users are more familiar with
- A patient mentioned that it “met my expectations” because it was simple and included what they would normally expect to see

## **Dashboard**

- Patients commented that the dashboard was “clear and concise” and that the colours and text were appealing. Nevertheless, a patient expected to see updates on the dashboard and for them to be more prominent. An example could include if they’d been added to someone’s circle, they would see this update on their dashboard clearly stated
- The “add diagnosis” that appears on the page seemed irrelevant and unclear as to why it is the first item on the page that the patient sees. They would have preferred to see a dashboard where they could navigate to sections of the portal
- A patient also expected to see some information about Amity on the dashboard to remind users about what the platform has to offer. This is currently offered in the footer section, but perhaps it would be more beneficial to see it clearly when the user signs in

## **Questionnaires**

- A patient found the questionnaire “easy to read and straight forward”
- One patient did not understand why the questionnaires had a “pending” section however, and desired further input to understand what would be pending in the questionnaire section

## **Trackers**

- The patients found the trackers “good and easy to navigate”
- A patient did mention that to improve the trackers, it would be good to be able to fill out the trackers at various periods of a day to be able to see the progress within a day. Currently, patients can only fill out information for a day
- The colour scheme was brought up where a patient thought that the green colour is quite dark and brighter colour or even a brighter tone of green would be more appealing
- A clearer understanding of how a patient can view their data for the mood tracker once they submitted their entry was desirable. A patient was unsure how to view that entry or previous entries

## **Resources**

- Patients found this section clear and easy to navigate
- Accessibility on this page was brought up where the contrast between the yellow banner and blue font may not be easy to read for some users. Therefore, there were concerns about whether there would be other skins to increase accessibility
- A heading to establish how some of these resource apps are recommended to the patient is also desirable. This could help patients understand what has influenced recommendations

## **My health**

- Patients found it clear on how to “add a diagnosis”,

## **Connect**

- The messaging layout looks good and is easy to understand
- Patients would have liked some assurance on what happens after they add someone to their circle

## **Other**

- Menu: When looking at this button, patients mentioned that everything was clear except the “personalise” section of the menu
- Personalise: When patients selected this button, it was not clear how to navigate to the next section and the “skip” function was not prominent for users to recognise
- Notifications: A patient requested that this becomes more prominent to help them recognise any updates since they last signed into the platform
- Logging Out: This function did not seem so clear to a patient as they would have preferred to see it clearly as a button

# SYSTEM ADMIN INTERFACE

One system admin tested the system admin interface.

The key functionalities tested for this role include:

- Dashboard
- Trust management
- Questionnaire builder
- Sub role
- Notifications

## **Dashboard**

- The system admin felt that it “makes sense and is easy to understand”
- The description of the tabs didn’t seem very clear and so a better description that aligns better with where the tab will take system admin would be helpful
- The system admin mentioned that the tabs could be more structured as there are three tabs on one row and one on another
- They also mentioned that the tabs being white with a white background makes it slightly hard to see, so if the tabs were a different colour to the background, this would be more efficient
- The colour scheme appears to be dull being grey and so more vibrancy is desirable

### **Trust management**

- Adding the trust was “simple” and “easy to use” but perhaps an explanation on what this section entails would be appreciated
- The system admin expected to be able to see all the trusts available in the region
- They also mentioned that there should be consistency with the language, capital and lower case format and the language in this section could be revisited

### **Questionnaire builder**

- This section was straight forward to the system admin
- There was confusion on an acronym (MH Review role) so some clarity on the use of words was desirable
- The form categories and age group did not make sense to the user in terms of their role. Perhaps a similar categories section
- Age group particularly seems too broad of a category so perhaps more clarity on why these categories have been included will provide more clarity for the system admin
- The system admin was interested in finding out if an audit history/dates of when questionnaires are built could be incorporated into this section
- The system admin wanted to know what needed approving when questionnaires were going live and what had been requested to be improved

### **Sub role**

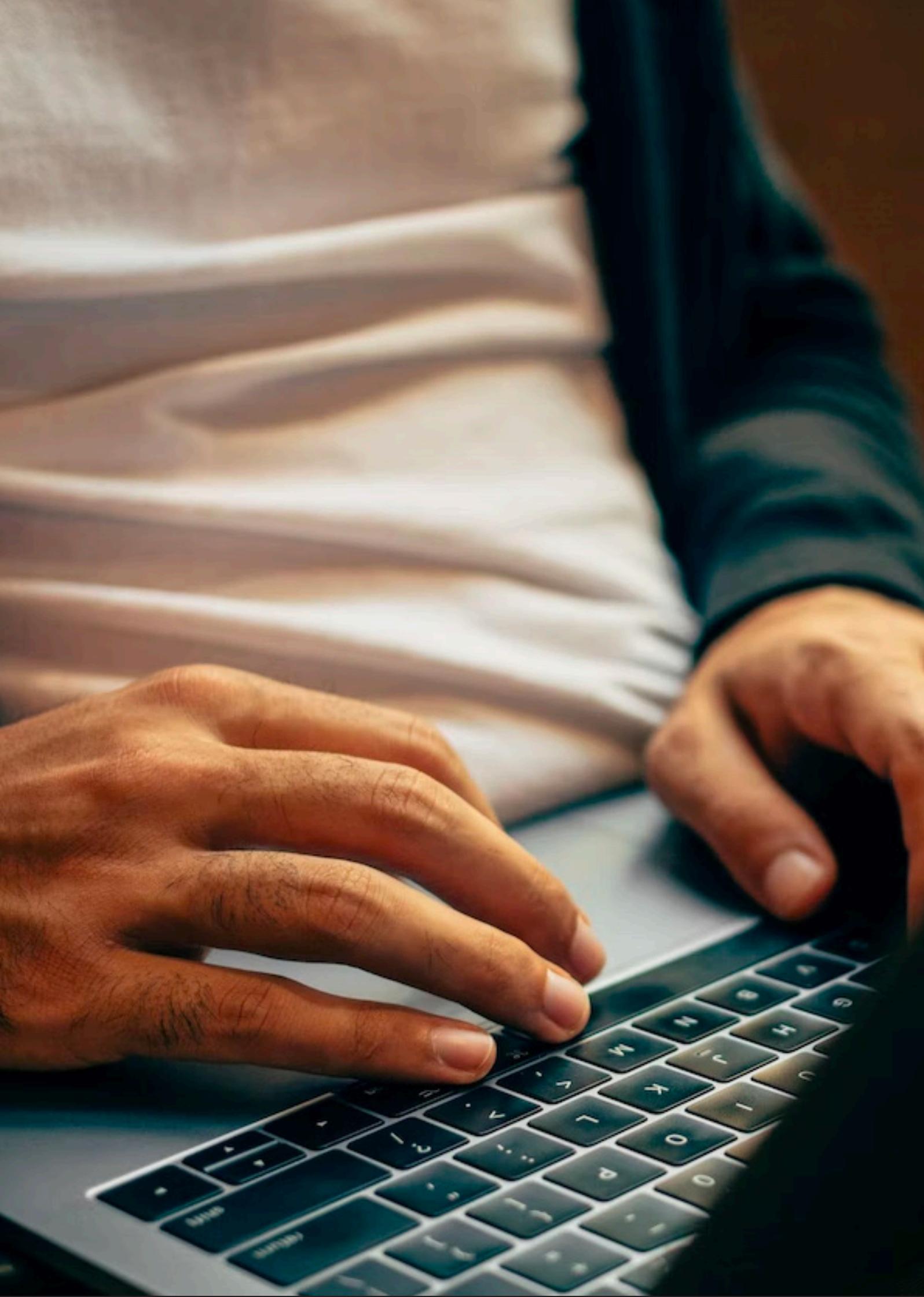
- The system admin assumed that a sub role could be added to someone's existing role but currently, it seems to be a separate function and seemed unclear
- Context on what each role entails is also desirable as there was confusion on what the roles were and how to assign a role to someone

### **Notifications**

- The system admin mentioned that the navigation was clear and the bold heading was helpful
- They did mention however, that the actions that need to be taken should be clearer and maybe have a tile or button to facilitate

### **Other**

- The system admin mentioned that a home button that is more prominent would be desirable
- The log out section was straight forward to the system admin to find



## TRUST ADMIN INTERFACE

Key features and functionalities were examined to gain necessary insights to help discover any gaps within the portal and any opportunities for further refinement.

Two trust admins tested the platform. The main functionalities tested include:

- Logging in
- Dashboard
- Questionnaire builder

During the usability testing session, we asked the user to test some of these functions alongside some other general ones to discover gaps within the portal and any opportunities for further refinement.

### **Logging in**

- The trust admin found this process clear and straight forward to achieve

### **Dashboard**

- The trust admins thought that the layout appears to be clean and straight forward but the purpose of the trust admin at this stage did not seem clear
- The trust admins felt that there was repetition with the heading “Trust admin dashboard” as it is mentioned 3 times and seems unnecessary

- From the tabs available on the dashboard, a trust admin was not clear on what “user management” would entail based on the caption provided and desired more specific information
- A trust admin mentioned that they would prefer to have all the different roles and view the platform based on the role they need to fulfil

### **Questionnaire builder**

- The trust admins found the tab “questionnaire builder” to be misleading as they are not able to build questions as suggested by the caption on the tab. It mentions that they would be able to review responses and share questions. However, when they click this function, they are not able to build questions but rather preview them and view the audit trail
- The colour and layout is appealing to users
- One of the trust admins was confused about the purpose of the audit trail and it’s relation to their role
- One of the trust admin mentioned that currently, there is a lot of scrolling needed to navigate down the page which is not preferred
- The view of responses was also questioned as the trust admins expected to see the responses of users, not just the questionnaire previews
- Viewing and approving questionnaires is seen as an important role for a trust admin which is currently unavailable on the platform
- A filter for the questionnaire builder is also desirable to help trust admins to filter through the data they receive quickly

## Other

- The notifications bell appears on some pages but not all, therefore a level of consistency with this is desirable
- Consistency of the colour scheme is also desirable as it switches from blue to grey



# RECOMMENDATIONS: QUICK FIXES

Based on the feedback we received from the participants we tested across the three interfaces, we can outline quick fixes and long term solutions to the problems addressed for each interface. Nevertheless, the clinician interface has not been tested. In addition, the resource hub and questionnaire builder also remain untested for all of the interfaces available. Therefore, further testing is required in the future.

Testing the interfaces with five participants for each role would be ideal to provide more insights on how the different interfaces are being perceived.

## PATIENT INTERFACE

### Dashboard

- The interfaces could welcome the user to Amity and provide a link to find out more information about Amity when they first sign in instead of this information being in the footer
- The notifications bell could be a bright colour with the number of updates that the patient has available

### Trackers

- The interfaces could include a button to take the patient to see their previous entries once they have submitted an entry in their tracker

## **Resources**

- The interface could provide a heading that helps users determine how resources are recommended to their specific need, for example “Recommendations based on your most searched items”. This could give patients more assurance on why these recommendations would apply to their specific needs

## **Connect**

- Some assurance on what happens after a patient adds someone to their circle is desirable, for example, a pop up to indicate that the person has been added

# SYSTEM ADMIN INTERFACE

## Dashboard

- A clearer description of what each tab does on the dashboard would be helpful. The current descriptions seem misleading
- Change the layout of the tiles to have a neater structure, for example instead of having 3 tiles on one row and 1 tile on another row, 2 rows with 2 tiles looks neater
- A clear home button as opposed to just the amity logo as users found it hard to navigate back to the dashboard

## Trust management

- Some indication or information on why a user may want to add a trust
- Consistency with language is desirable for example, words starting with a capital letter across the portal

## Questionnaire builder

- Removal of acronyms unless they are defined, for example, MH review role. The user did not know what MH stood for

### **Add Notifications**

- Clearer buttons to indicate what notifications a system admin may need in order to take the necessary actions

### **Navigation**

- A home button is desirable and would make navigating back to the home screen
- All the tabs available in the portal visible on each page to avoid going to the dashboard to access other parts of the portal
- A “Logout” button is also desirable as opposed to going to the user account and logging out this way

# TRUST ADMIN INTERFACE

## Dashboard

- A short explanation of what the trust admin's role is on the portal is desirable to help staff understand what functions they can utilise, particularly if they often manage more than one account
- Headings should be clear and avoid duplication e.g. Trust admin should be displayed as a heading once or twice for a direct user experience
- Rewording the tab captions on the dashboard would be ideal to provide clarity on what the tab should direct the trust admin to

## Questionnaire builder

- A filter to find items quicker

## Other

- Notification bell consistently on all pages
- Consistency of colour scheme and a more vibrant colour scheme (or at least replacement of the grey)

# RECOMMENDATIONS: LONG TERM SOLUTIONS

## PATIENT INTERFACE

### Dashboard

- Various skins to improve accessibility, particularly for the resources section

### Questionnaires

- A short caption to explain what each heading is, for example, “completed forms” could have the caption - “this is where you can view completed forms”. Alternatively, when the user clicks on the header, a short description could be provided on the page

### Trackers

- A patient requested to fill out their trackers at several points during the day, perhaps allowing multiple entries throughout the day instead of one per day would be useful
- A brighter colour scheme for this section, for example, a brighter green colour

### My health

- We could move “add someone to your circle” into the connect section as it could be easier to find and seems more relative in this section

## **Other**

- Revisit the personalise section and maybe change the wording as it appears misleading to users
- A log out button that appears on all pages instead of users having to go to their name and using the drop down to log out

## **Further testing**

Key functionalities where further testing would be beneficial include:

- NHS Login
- Access to health data including diagnosis, medications, allergies, blood type, pregnancy/antenatal care
- Viewing documents
- Completing questionnaires
- All the trackers except the mood tracker
- Receiving notifications when an appointment message arrives

# SYSTEM ADMIN INTERFACE

## Dashboard

- A brighter colour scheme as the user believes it to be dull currently.

## Trust management

- Being able to view all the trusts available

## Questionnaire builder

- An information icon to provide some indication on what each of the form categories mean and why they are needed

- Refining the age category as it currently seems too broad, or an information icon to explain why this category may be useful
- An audit trail revealing when questionnaires are built
- Sections to see questionnaires that are in the draft section, those that need to be approved, those that are pending to go live, those that need improvement before sharing also

### **Sub role**

- An information icon to detail a short explanation of the sub role and how it relates to the interface

# TRUST AMDIN INTERFACE

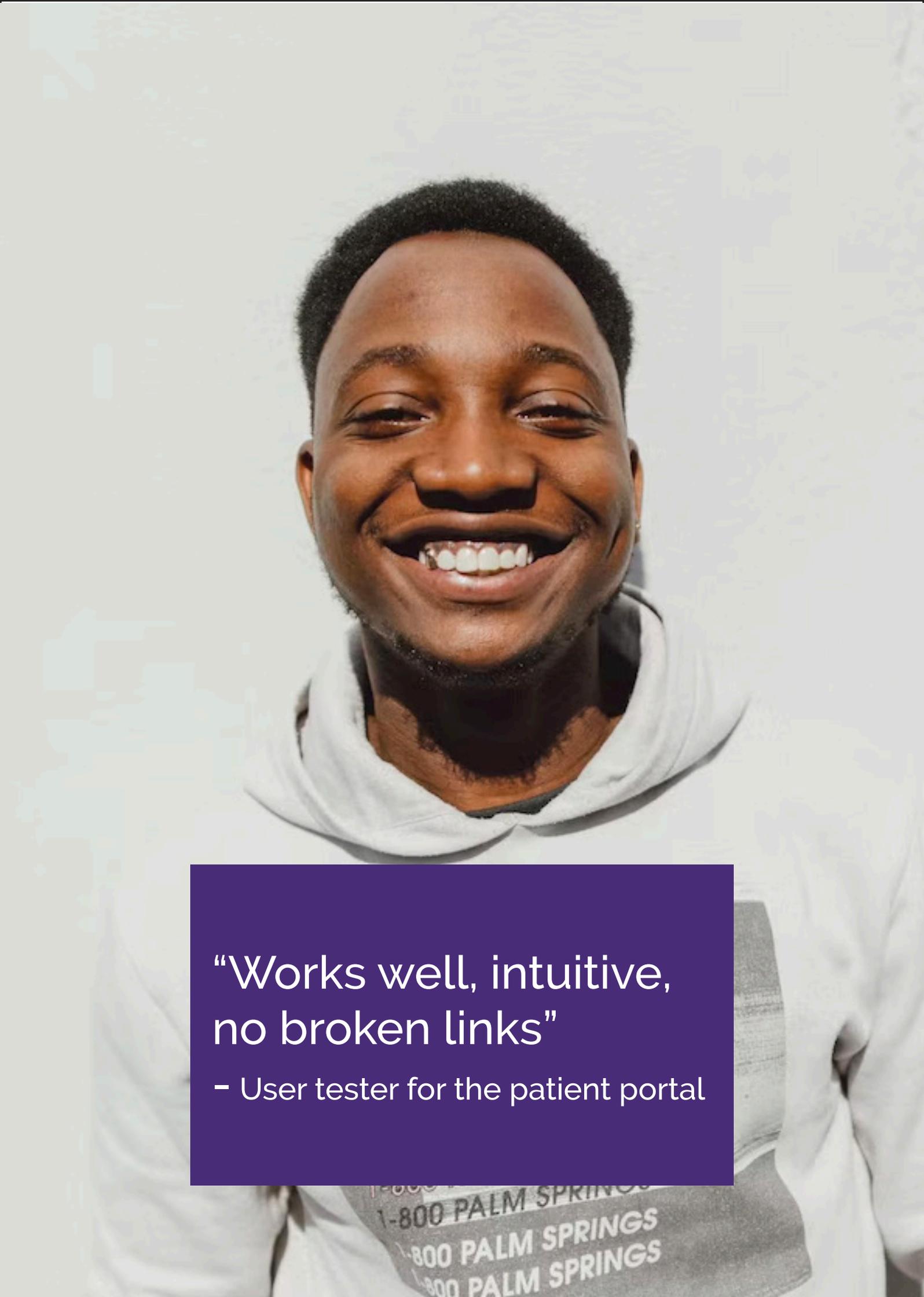
## Questionnaire builder

- Opportunity for trust admin to edit it or pause the questionnaire
- Clearer headings in the audit trail, as currently users are finding it hard to understand it's purpose
- Page numbers to avoid long periods of scrolling
- Trust admin to be able to view which patients have completed the questionnaires
- Viewing and approving questionnaires

# SUMMARY

Overall, the user testing that occurred during this phase included a small group of participants in three roles. This testing enabled us to determine how users interact with the portal. We have been able to identify some key elements of the different interfaces that participants find useful and those that may require further improvement.

Nevertheless, further discussion is needed on how to address the issues detailed in this report. Updates and decisions on what will be addressed will be considered in the near future.

A close-up portrait of a young Black man with short dark hair, smiling broadly and showing his teeth. He is wearing a white hoodie. The background is a plain, light-colored wall. A dark purple rectangular box is overlaid on the bottom right of the image, containing white text.

“Works well, intuitive,  
no broken links”

- User tester for the patient portal

A woman with dark hair, wearing a white off-the-shoulder top, is sitting and looking down at a laptop. The laptop is silver and has the Apple logo on the back. The background is softly blurred, showing what appears to be a window with light-colored curtains.

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