CLINICAL PATHOLOGY – RESULTING

CLIENT ADVISORY GROUP

RESEARCH FINDINGS REPORT

JOURNEY MAPPING

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Understanding Clinical Pathology Resulting workflows through ongoing collaboration with client laboratory organizations.

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PURPOSE

Understand and validate current Clinical Pathology Resulting workflows across multiple client laboratory organizations to inform product requirements, workflow design, and future product decisions.

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CONTEXT

The Product team established an ongoing Client Advisory Group to ensure the Clinical Pathology Resulting experience reflected current laboratory practices.

Although members of the Product team had previously worked in laboratories and brought substantial domain knowledge, many years had passed since some had worked directly in a lab environment. Laboratory workflows had also continued to evolve and could be configured differently based on instrumentation, staffing, organizational practices, and local requirements.

The advisory group allowed the team to validate existing knowledge, challenge internal assumptions, gather requirements for user stories, and understand how Resulting was currently performed across different organizations.

The group remained involved throughout the project. Participants contributed during early discovery and requirements definition, reviewed developing workflows, and provided feedback on evolving design concepts.

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METHOD

The Product team partnered with five client laboratory organizations through an ongoing Client Advisory Group that met regularly throughout the project.

Sessions were used to:

- Gather and validate workflow requirements
- Understand current Clinical Pathology Resulting practices
- Identify workflow challenges and operational constraints
- Examine differences in system configuration and laboratory practices
- Review proposed workflows and design concepts
- Collect feedback as requirements and designs evolved

The Product team facilitated the sessions. As the UX Researcher, I attended the discussions, listened to client feedback, documented relevant observations, identified recurring themes, and used the findings to inform journey mapping, workflow analysis, design concepts, and usability testing.

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PARTICIPANTS

The Client Advisory Group consisted of five Clinical Pathology laboratory organizations. The same organizations participated throughout the project, providing continuity as requirements evolved and design concepts matured.

Attendance varied by session. Each organization selected representatives based on the topics being discussed, participant availability, and the relevance of the session to their responsibilities.

Participants represented a cross-functional range of Clinical Pathology roles, including:

- Laboratory technologists
- Supervisors
- Laboratory managers
- Laboratory administrators
- Pathologists
- Other operational and subject-matter experts

Some participants spoke from direct experience performing daily Resulting work. Others contributed broader perspectives related to laboratory management, configuration, clinical oversight, or organizational requirements. At times, representatives also spoke on behalf of the wider needs of their laboratory.

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DISCUSSION TOPICS

The Client Advisory Group explored the end-to-end Clinical Pathology Resulting workflow. Topics evolved throughout the project as requirements were clarified and design concepts were developed.

Discussion areas included:

- Accessing the Resulting backlog
- Filtering and prioritizing work
- Identifying new work and reruns
- Auto Verification and Auto-Post
- Understanding why a result required manual review
- Reviewing current runs and previous runs
- Selecting which result to release when multiple runs were available
- Reviewing historical and related testing
- Accessing scattergrams and other instrument information
- Reviewing QC, alerts, and client-configured flags
- Applying dilution
- Initiating reruns
- Supervisor Review
- Manual Differential
- Critical result communication and call-log documentation
- Workflow configuration and operational constraints
- Feedback on proposed workflows and design concepts

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KEY THEMES

THEME 1

Backlog access and work prioritization affect workflow efficiency

Clients described significant effort before clinical review could begin. The Resulting backlog could include work from multiple disciplines, requiring users to narrow the worklist by instrument, department, date range, and additional column-level filters.

This effort was repeated because the initial filter selections could not be saved and the previous backlog state was not preserved after a result record was opened. Dashboard widgets could reduce some of this work, but creating them required SQL knowledge that was not available in every laboratory.

Clients also needed clear differentiation between new work and reruns, as well as immediate visibility into why a result required manual review.

SUPPORTING EVIDENCE

- Users repeatedly reapplied instrument, department, and date filters.
- Initial filters could not be saved.
- Column-level filters could be saved, but column-width adjustments could not.
- Returning from a result required revisiting and rebuilding the backlog view.
- Dashboard widgets required SQL knowledge to configure.
- Clients wanted reruns clearly distinguished from new work.
- Clients wanted the reason for failed Auto Verification visible before opening the record.

IMPLICATIONS

- Preserve the user's backlog state.
- Support saved Resulting views.
- Restore previous filters and worklist position.
- Distinguish reruns from new work.
- Surface failed Auto Verification reasons within the backlog.

THEME 2

Clinical decision-making relies on information from multiple sources

Result release required more than reviewing the current instrument value. Clients described evaluating current runs, reruns, previous results for the same test, related testing, QC status, scattergrams, instrument information, alerts, and client-configured flags.

When multiple runs were available, users also needed to determine which result should be selected for release.

SUPPORTING EVIDENCE

Clients identified the need to review:

- Current instrument runs
- Previous reruns
- Historical results for the same test
- Other related testing
- Scattergrams
- QC status
- Instrument messages
- Client-configured alerts
- Client-configured flags
- Sample integrity
- Insufficient-sample indicators

Clients also identified actions that could follow review:

- Release the result
- Select a specific run for release
- Order a rerun
- Set dilution
- Invoke QC
- Send the result for Supervisor Review
- Mark the result for Manual Differential

IMPLICATIONS

- Consolidate decision-support information into a unified Resulting workspace.
- Allow users to compare multiple runs.
- Make the selected result for release explicit.
- Keep QC, scattergrams, flags, alerts, and instrument information readily accessible.
- Present workflow actions within the context of the result review.

THEME 3

Resulting includes communication and documentation responsibilities

The advisory sessions showed that Resulting did not end with reviewing and releasing laboratory values. Clients repeatedly discussed the call log used when the laboratory contacted the referring physician, particularly when communicating critical results.

The communication itself, the person contacted, the outcome, and the associated documentation formed an important part of the Resulting workflow.

SUPPORTING EVIDENCE

- Insufficient-sample indicators The call log was raised repeatedly during advisory discussions.
- Laboratory staff needed to document calls made to referring physicians.
- Communication records needed to remain associated with the relevant result.
- The workflow required traceability beyond the release action itself.

IMPLICATIONS

- Support call-log documentation within the Resulting workflow.
- Associate communication records with the relevant result.
- Preserve an auditable history of communication activity.
- Reduce the need to leave the result context to document the call.

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HOW THE RESEARCH INFLUENCED THE PROJECT

The Client Advisory Research provided the initial evidence needed to define the Resulting experience beyond a narrow feature request.

The work informed:

- Product requirements and user stories
- Journey map
- Workflow definition
- Jobs-to-Be-Done
- Design principles
- Backlog and result-record concepts
- Supervisor Review and Manual Differential workflows
- Prototype development

The advisory group also continued to review evolving designs, allowing the team to gather feedback as concepts matured rather than relying only on a single discovery phase.

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HOW THIS INFORMED THE NEXT PHASE

The advisory research established a shared understanding of current Resulting practices, information needs, workflow constraints, and product assumptions requiring correction.

These findings became the foundation for the journey-mapping workshops, where the end-to-end Resulting experience was documented in greater detail and translated into workflow opportunities for design exploration.