

CLINICAL PATHOLOGY – RESULTING

RESEARCH FINDINGS REPORT

JOBS TO BE DONE

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Defining the laboratory technician's complete Results Review job before designing the experience.

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PURPOSE

Define the laboratory technician's job before designing the Clinical Pathology Results Review experience.

The work established what technicians needed to accomplish from the moment instrument results entered the backlog through the release of the complete specimen test panel. It also identified the outcomes technicians needed, the conditions that interfered with the work, and the rules each client configured differently.

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CONTEXT

Results arrive from laboratory instruments, but reviewing an individual value is only one part of the technician's responsibility.

The technician must identify the specimen test panel requiring attention, review the complete panel, investigate anything questionable, complete the required follow-up, select the appropriate results, and release the panel.

Research from the Client Advisory Group informed the workshops. The Jobs to Be Done process translated that research into a clear definition of the technician's job before any prototype was created.

The primary job was defined as: Review a specimen test panel and release the complete result.

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METHOD

I planned and facilitated four one-hour Jobs to Be Done workshops with the Product Owner, Business Analyst, and Internal Subject Matter Expert.

The workshops defined:

- Who performed the job
- What initiated the job
- What marked the job as complete
- The activities required to move from start to finish
- The outcomes that defined success
- The conditions that interfered with the work
- The available actions when a result appeared questionable
- The operational rules configured by each client

I documented and synthesized the workshop findings and independently created the final JTBD artifact.

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PARTICIPANTS

The workshops included:

- Product Owner
- Business Analyst
- Internal Subject Matter Expert

I facilitated all four sessions and created the JTBD framework and final artifact.

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DISCUSSION TOPICS

The workshops examined the complete job of reviewing and releasing a specimen test panel.

Discussion areas included:

- Finding the specimen test panel requiring attention
- Reviewing results, flags, reference ranges, deltas, and quality-control information
- Viewing active tests, previous tests, and every associated run
- Investigating questionable results
- Rerunning a test
- Changing the dilution
- Using another instrument
- Sending a result for additional review
- Selecting values across multiple runs
- Preserving the source of a selected result
- Retaining the complete testing record
- Completing critical calls and required reviews
- Releasing the complete specimen test panel
- Supporting client-configured terminology, permissions, review, validation, audit, and quality-control rules

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KEY THEMES

THEME 2

THE BACKLOG MUST MAKE WORK REQUIRING ATTENTION CLEAR

The technician's job begins when instrument results enter the backlog. Before reviewing a panel, the technician must be able to identify which work requires attention and determine what to address next.

The workshops also identified a broader problem with canceled, rejected, and stale work remaining in the backlog. Older work could be overlooked as the backlog became increasingly difficult to manage. This issue was documented but remained outside the scope of the initial prototype.

SUPPORTING EVIDENCE

- The job begins when instrument results enter the backlog.
- The technician must find the panel requiring attention.
- A successful backlog makes required work immediately clear.
- Canceled, rejected, and stale work can remain visible.
- Older items may be overlooked when the backlog becomes unmanageable

IMPLICATIONS

- Make panels requiring attention easy to identify.
- Communicate priority and status clearly.
- Ensure the technician can begin review without first interpreting an unclear backlog.
- Preserve the broader backlog-management issue for future product exploration.

THEME 2

THE TECHNICIAN'S WORKSPACE MUST PERSIST THROUGHTOUT THE JOB

Technicians move between the backlog and individual result records while completing their work. When table configurations disappear, technicians must reconstruct the workspace before continuing.

Because the job is repeated throughout the day, losing column widths and other settings introduces unnecessary work and interrupts the review process.

SUPPORTING EVIDENCE

- The table needed to return exactly as the technician had left it.
- Column widths and other settings disappeared after opening a record.
- The technician needed to return from a record without rebuilding the table.
- Preserving the table setup was established as a requirement before the first prototype.

IMPLICATIONS

- Preserve table configurations when technicians return from a record.
- Maintain table settings across sessions.
- Return technicians to the same working context.
- Avoid requiring repeated setup during a high-frequency workflow.

THEME 3

ACTIVE TESTS, PREVIOUS TESTS, AND EVERY RUN MUST BE REVIEWED TOGETHER

A current result may need to be interpreted in relation to previous testing and other runs associated with the specimen. Reviewing only the latest value does not provide enough context to understand the complete testing history.

Technicians need to see active tests, historical results, and every run together rather than reconstructing that history across separate views.

SUPPORTING EVIDENCE

Technicians needed to:

- Review active and previous tests together.
- See every run associated with the specimen.
- Compare current findings with previous testing.
- Review ranges, deltas, flags, quality-control information, instruments, and dilutions.
- Understand changes across the available testing history.

IMPLICATIONS

- Present active and historical testing within the same workspace.
- Include all available runs.
- Make differences between tests and runs easy to compare.
- Keep the information required for review visible in context.

THEME 4

QUESTIONABLE RESULTS CREATE MULTIPLE INVESTIGATION PATHS

A result that appears questionable does not move directly to release. The technician must determine what follow-up is required and continue investigating until the panel can be completed.

The appropriate action depends on what appears wrong and may involve repeating the test, changing how it is performed, using another instrument, or asking another person to review it.

SUPPORTING EVIDENCE

When a result appeared questionable, the technician could:

- Rerun the test.
- Change the dilution.
- Use another instrument.
- Send the result for additional review.

A rerun could be required when a result:

- Fell outside the expected range.
- Showed a significant delta.
- Appeared inconsistent with the surrounding results.
- Was suspected of being affected by the instrument or testing process.

IMPLICATIONS

- Integrate investigative actions into the Results Review workflow.
- Allow technicians to initiate a rerun without losing the original result.
- Support changes in dilution and instrument.
- Provide a clear path for requesting additional review.
- Keep the technician within the context of the specimen test panel throughout the investigation.

THEME 5

SELECTING RESULTS ACROSS RUNS MUST PRESERVE THEIR ORIGIN AND COMPLETE HISTORY

When multiple runs exist, the technician may determine that the appropriate result for release did not come from the latest run. Individual values may need to be selected across different runs.

The selected result must remain connected to its source, and the complete testing record must remain intact. Choosing a value for release cannot erase or obscure the other runs that contributed to the decision.

SUPPORTING EVIDENCE

- A result could be selected from any run.
- The source of the selected result needed to remain clear.
- Questionable results needed to be rerun and compared without losing records.
- The technician needed to select individual results across runs.
- Every run had to remain part of the complete testing record.

IMPLICATIONS

- Allow technicians to select values across multiple runs.
- Clearly identify the source run for every selected value.
- Retain all original and rerun results.
- Preserve the complete audit trail.
- Make the final selection explicit before the panel is released.

THEME 6

RELEASE DEPENDS ON COMPLETING CLIENT-CONFIGURED FOLLOW-UP

The technician's job ends when the complete specimen test panel is released. Release may depend on more than selecting the appropriate values.

Critical calls, additional review, validation, audit, or quality-control activities may need to be completed first. The required steps differ according to each client's configured workflow.

SUPPORTING EVIDENCE

- Critical calls and required reviews needed to be completed before release.
- Technicians needed to document critical contact.
- A result could be sent through a configured review, validation, audit, or quality-control path.
- Auto verification and backlog priorities differed by client.
- Terminology and permissions were client-configured.
- The existing approval model did not fit every healthcare workflow.

IMPLICATIONS

- Surface incomplete calls and required reviews before release.
- Support documentation of critical contact within Results Review.
- Accommodate client-configured review, validation, audit, and quality-control rules.
- Support differences in terminology and permissions.
- Avoid imposing one fixed release path on every laboratory.

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HOW THE RESEARCH INFLUENCED THE PROJECT

The JTBD work gave the product team a shared definition of the technician's job before any interface was designed.

It established that the product needed to support the complete process of finding, reviewing, investigating, selecting, documenting, and releasing results—not simply the approval of an individual value.

The work informed:

- Backlog requirements
- Preservation of table configurations
- Presentation of active and historical testing
- Comparison of multiple runs
- Investigative actions for questionable results
- Selection of values across runs
- Preservation of result origin and testing history
- Critical-call documentation
- Client-configured review and release requirements
- The first Results Review prototype

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HOW THIS INFORMED THE NEXT PHASE

Three requirements carried directly into the design:

- Table configurations had to persist across sessions.
- Active and historical results needed to be presented together.
- Review and release had to adapt to each client's configured rules rather than assume one workflow would fit every laboratory.

These requirements became the foundation for the first Results Review prototype.