SEER*DMS Change Control Advisory Board (CCAB) Users Group
Teleconference Summary
January 30, 2020
3:00 to 4:30 p.m. EDT

Representatives from NCI, IMS, the Scientific Consulting Group, Inc. (SCG), and 19 cancer registries participated in the SEER*DMS Users Group conference call on January 30, 2020. Participants included:

REGISTRIES:

Alaska
Central California
Connecticut
Detroit
Georgia
Greater Bay Area
Hawaii
Idaho
Iowa
Kentucky
Los Angeles
Louisiana
Massachusetts
Minnesota
New Jersey
New Mexico
New York
Seattle
Utah

NCI: Melissa Bruno, Steve Friedman, Marina Matatova, Serban Negoita, Winny Roshala

IMS: Suzanne Adams, Linda Coyle, Philip Crider, Chuck May, Jennifer Stevens, Nicki Schussler

Action Items

- Participants who would like copies of the usability testing site-visit results that were delivered at the 2018 Face2Face meeting should contact Marina Matatova or Linda Coyle.
- Linda Coyle agreed to inform registries about problems with the new interface as they are identified.
- Registry participants should notify Linda if they have not received the document about the new SEER*DMS interface. The document was distributed via Squish.
- Registries were asked to provide Linda with feedback on the new SEER*DMS interface changes by February 14. Even if a registry has no feedback, IMS would like acknowledgement that they have reviewed the new interface. Registries can continue to send feedback after February 14, but this is the deadline for initial feedback.
- Registries should notify Marina Matatova if they would like to evaluate SEER*Abs in 2021.
- When providing feedback, registries should indicate whether they have the capacity to flip from wide to long screen on their monitors.
- Mona Highsmith agreed to request an option to expand text and images as part of the feedback from the Minnesota registry.
- Linda agreed to submit another Squish issue to remind registries to submit feedback by February 14.

New User Interface   **Marina Matatova and Linda Coyle**

Background on Usability Testing and Interface Testing and Update

Marina and Linda reviewed the history and goals of the SEER*DMS usability project and the reasons for the 2020 changes to the interface. The SEER*DMS usability (UX) project was initiated approximately 4 years ago to guide improvements to the system, particularly the user interface.

The UX project began with a needs assessment of registry partners and CTRs specifically. UX visits to selected registries began in 2018 to examine how different registries used SEER*DMS. Both NCI and IMS found the results enlightening and helpful for making SEER*DMS more useful to the registries. Marina emphasized that the goal of UX testing and the resulting interface redesign is to make SEER*DMS easier to use for all registries without requiring them to change their processes. The consolidated findings from the site visits were presented at the 2018 SEER*DMS Face2Face meeting.

Beta versions of the new SEER*DMS interface were developed and tested in 2019. The final beta version was UX tested remotely at one registry. Based on the findings from that last testing session, a final version of the interface was developed. IMS began implementing the changes necessary for this new interface system-wide in October 2019 and all users will be able to access the new interface beginning today. The path screening and matching tasks have not been fully converted but will be within 1 week.

The new test version allows users to toggle back and forth between the new and old interface (using the magic wand in the toolbar) so that they can adjust to the new interface, identify problems, and provide feedback to IMS. A box will pop up to tell users they are logged onto their test server. IMS plans to fully transition to the new interface and disable the old one in April 2020. Linda encouraged registry participants to compare new and old interfaces when reviewing and considering feedback.

Linda provided a demonstration of the changes that are part of Phase 1 of the new interface, which focuses on improving readability. Linda also presented a table showing the differences in the old and new SEER*DMS interfaces. Most registries already have tried the new interface. Format changes that appear in this new interface (e.g., color options, icons, fonts, labeling, line spacing and length, use of white space, contrast, content organization, field alignment, and use of standard web design approaches such as dropdown option lists and button styles that indicate function) are designed to make the screen easier to read and reduce the sense of information overload. For example, the interface no longer relies solely on colors to indicate an edit failure, but also uses alerts. Acronyms also are spelled out. Additionally, the menu now is indicated by three dots to align with standard web design practices and users can click on their username to go to their account. The position of labels was changed, which will affect scrolling. Pages now are broken into sections that can be collapsed and expanded and control+F cannot be used to search pages unless everything is expanded. IMS is considering adding a field finding tool in the patient set editor to facilitate searching on a single page.

Facility names are shown in some parts of the system. Users can click on or hover over these IDs to see the reporting facility name. This change was made to eliminate the need to translate IDs to facility names. Initial testers responded positively to this change, but Linda would like all registries to test this new feature.

Layout was standardized across the system, so some field locations may have changed. This change was implemented to make maintenance less time consuming. Linda asked that registries also provide feedback on this change.

Marina asked that registry staff allow some time to adjust to the new interface before providing feedback. IMS and NCI want to know about real problems with the changes, not challenges related to the learning curve. The test site will be indicated with a large red box and banner displayed on every page.

Linda emphasized that the appearance and certain aspects of the interface changed but the system did not change. For example, the menu is in the same location and the items on the menu are the same. The left navigation changed little except for the facility names and spelling out the names of the metadata pages. The tools used for consolidation and demo information are in the same location with the same functionality. Registrars will continue to use Dx Info to link records at the CTC level and the same information is available for this feature. The only change in Dx Info is that the default is the text tab for the information pop up.

IMS will consider whether different options for expanding and collapsing sections (including SEER*DMS ability to recall preferences) and evaluate these options in the second round of testing. IMS also will examine how the new spacing affects horizontal scrolling because they do not want source data to scroll from left to right.

Registries should be able to use the new interface to complete most of their work with the exception of Path Screening and Matching, which still need to be fixed. IMS plans to update the new interface approximately twice a week.

Feedback from registries does not need to be formal or comprehensive. Registries can send notes with screenshots to explain comments in a Word document, but should submit screen shots via the SEER*DMS File Transfer Protocol to protect patient identifiers. IMS will review registry feedback and create a list of issues. If an error is found, IMS will make the correction as soon as possible. Design concerns will be presented to the CCAB for discussion.

The primary changes being considered by IMS for Phase 2 of UX testing relate to default settings for expanding and collapsing sections. One problem with the current version of SEER*DMS is that some user preferences are hidden. One approach that will be investigated is allowing actions in the Patient Set Editor to guide preference settings. As part of Phase 2, IMS also is considering:

- Re-design of the left navigation in the Patient Set Editor.
- Re-design of the Dx Info popup.
- Review of the Rx/Tx Tab for possible redesign.
- Monitoring the effectiveness of the interface with different size monitors with different resolutions.
- Evaluating two different modes for editing – condensed versus a more spacious layout.

Discussion

Linda asked that the discussion focus on broader issues and that participants submit questions about specific functions to her via email or Squish. A few specific questions were answered during the discussion before Linda made this request.

In response to a question, Linda indicated that IMS has no plans to evaluate and update SEER*Abs. During the last Face2Face meeting participants discussed the possibility of creating a new standalone application. NCI is considering evaluating SEER*Abs at some point. Marina asked that registries notify her if they would like to examine SEER*Abs in 2021.

A participant asked about the possibility of changing preferences for the chevron group that automatically opens on the CTC tab. IMS is considering defaults, which will be discussed during the next IMS update.

Participants asked how the facility numbers translate into names. Facility IDs are the FAC-IDs assigned by registries. The label attached to that assigned ID appears as the facility name in SEER*DMS.

The text expansion option was removed. Linda requested that Mona Highsmith of the Minnesota registry formally request an option to expand text and images as part of that registry's feedback on the new interface.

The Kentucky registry found that everything was collapsed in Source Data, which is not useful for comparing record data to patient set data. IMS modified this feature so that all panels are open by default. IMS has a list of other features that will be improved in the new interface.

Participants noted that significant scrolling was needed in the new interface. IMS noticed this problem and NCI is evaluating the benefit of the new design relative to the drawbacks such as the extra scrolling. IMS also is examining ways to create a comfortable versus a condensed mode for editing and the relative benefits of each option.

Another participant asked if a pending, unattached record still appears in a different color. Color is used in the new interface to indicate that a record requires additional work. Users still can click on that notification to link a record or create a new CTC. The next step would be to consolidate these data, and when the users save, confirm that the record was consolidated.

Linda indicated that she wants to hear about challenges using the new interface with different monitor sizes.

SEER*DMS Updates   **Linda Coyle and Marina Matatova**

No SEER*DMS Face2Face meeting will be held in 2020. This meeting will resume in 2021, and Marina will provide updates during future CCAB calls.