

# PORTFOLIO

Ernst & Young / Orion  
Symantec / PwC  
Amchart  
Amgen-Novartis / CapGemini  
Bausch & Lomb / Photon  
Allergan / Centron  
ISC

# EY RAPToR and Orchestrator – Tax Platform and Embedded Application

- Description:** Ernst & Young's Tax Practice is embarking on a large-scale effort to automate workflow for tax preparation through a suite of applications embedded in an enterprise tax platform called "RAPToR." This digital transformation effort brings the entire accounting process away from spreadsheets and into the web front-end.
- Situation:** One application relied on Excel and an 'add-in' which sits beside the spreadsheet and manages workflow. Microsoft is no longer supporting the 'add-in' and the entire application needs to conform to the behavior and look and feel of the RAPToR application.
- My Role:** In addition to conforming the front-end design to the web components, I needed to understand the user journey for tax preparers. This meant familiarizing myself with a next-generation initiative to coordinate on-demand, day-worker resources to accomplish short, specific tasks within the interface, a mode of operation called "Future of Work"
- Solutions:** User interviews, stakeholder interviews, user research and usability, visual design, user journeys and personas, wireframes and high-fidelity mockups

# Orchestrator Excel Add-in

The Orchestrator app is a web-enabled add-in to Excel that tracks users tasks and provides interaction through commenting and feedback to improve workflow. It does not actually interact with Excel but as tax accountants it presents in an environment familiar to this userbase.

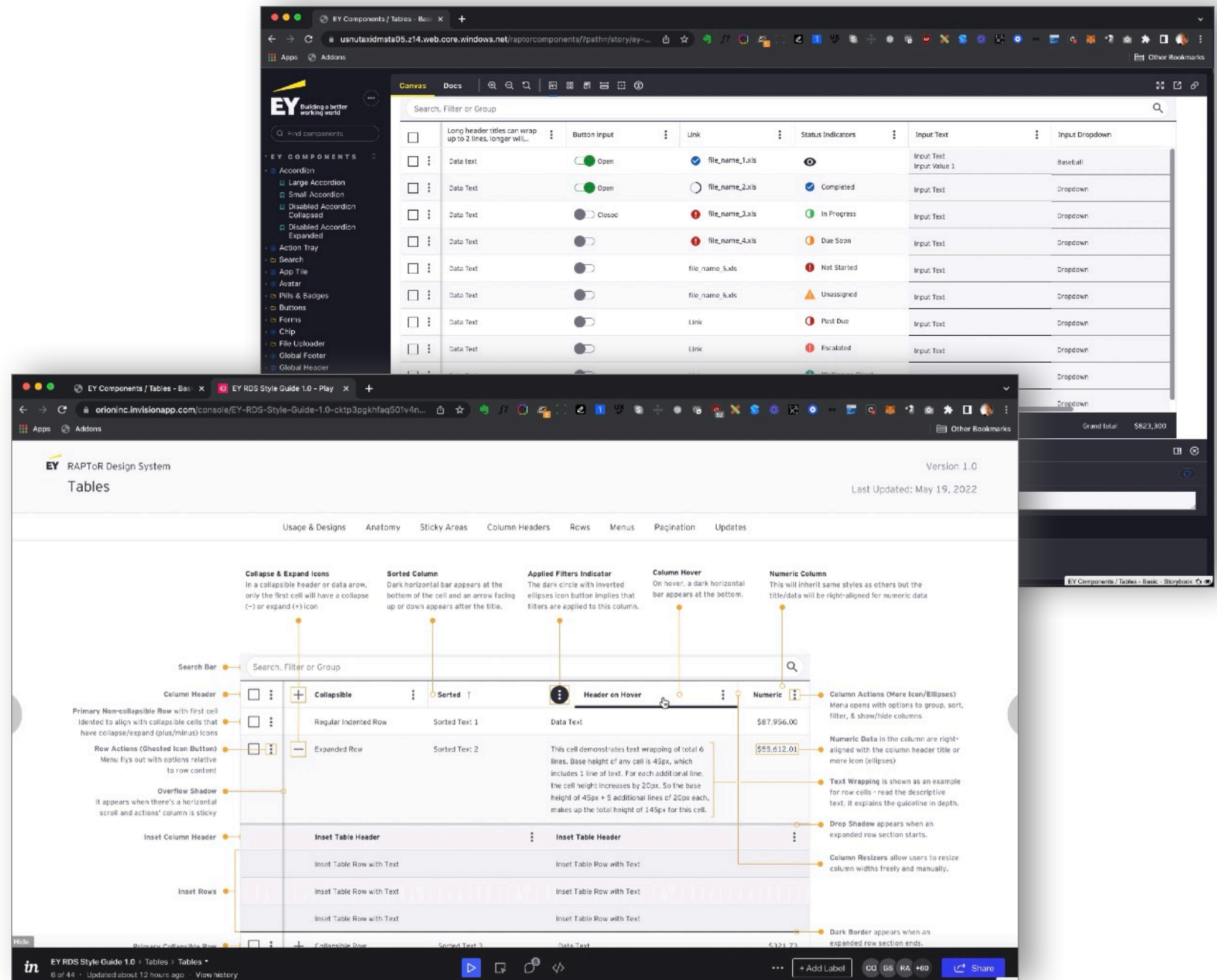
The screenshot displays the Orchestrator Excel Add-in interface, which is a web-enabled application integrated with Microsoft Excel. The interface is divided into several sections:

- Excel Worksheet:** The background shows a tax form titled "K-1 Extraction Workpaper" for "Entity 1". The form includes sections for "PARTNERSHIP INFORMATION" and "K-1 Extraction Workpaper". The "K-1 Extraction Workpaper" section contains a table with columns for "Document Intelligence", "Captive", "Manual Input", "Final Result", and "Data Diagnostic". The "Final Result" column shows "25" for "Number of non-blank rows".
- Global Tax Platform (QA) Panel:** A sidebar on the right displays the "Global Tax Platform (QA)" interface. It includes a "Task Summary" section with a "Load data from JSON" button and a "Notes / Open Items (21)" section. The "Notes / Open Items" section lists several items with details such as "Type", "Apply To", "Date", and "Time".
- Task Summary:** A section titled "Task Summary" provides a brief overview of the current task, including a "Load data from JSON" button and a "Duration" field.
- Notes / Open Items:** A section titled "Notes / Open Items (21)" lists several items with details such as "Type", "Apply To", "Date", and "Time".

The interface is designed to be familiar to tax accountants, with a focus on tracking tasks and providing feedback to improve workflow.

# RAPToR Design System and Framework

The Team already had a rich design system with a wide palette of common components to work from. But it couldn't be cookie-cutter because this application was unique because it operated in a panel and needed feature parity to the Excel version.

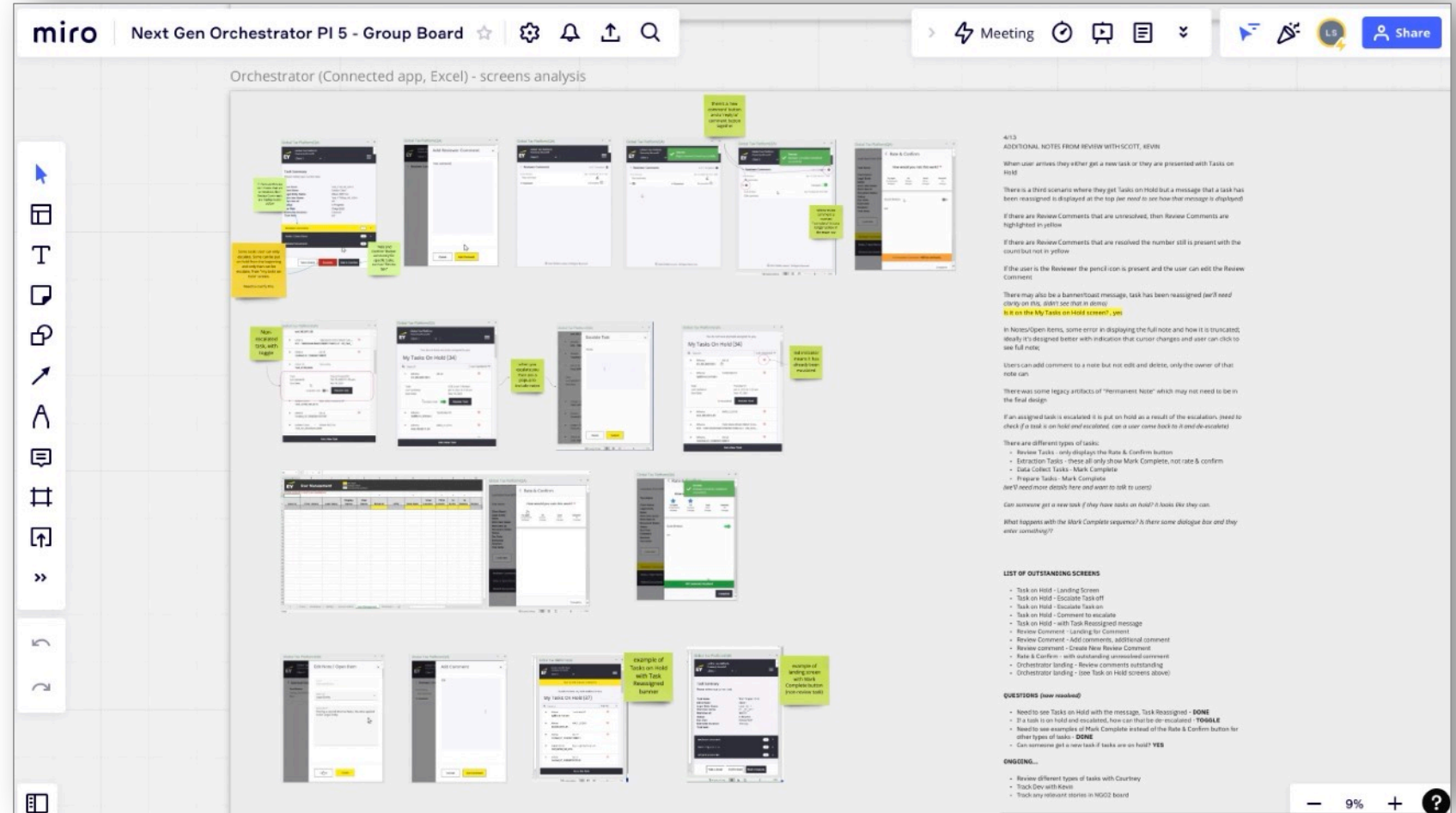




# Future of Work Initiative and Gig Worker Optimization

Orchestrator was part of a “Future of Work” initiative to mobilize day workers globally to handle short, precise tasks in a more fluidly efficient manner.

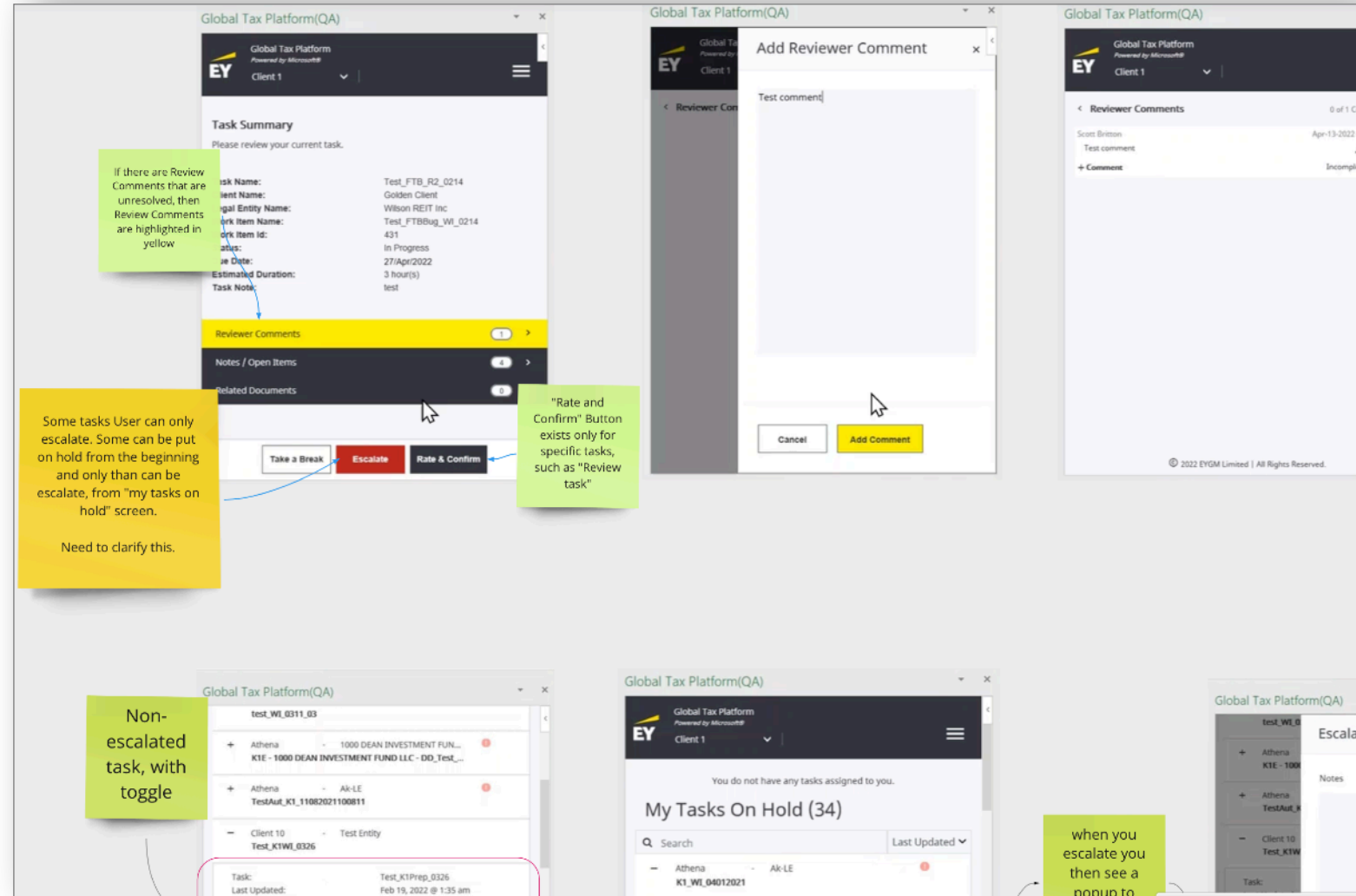
We needed to understand the flow of how users engaged with Orchestrator first before redesigning it.



# User Flow Through Orchestrator

In workshop sessions in Miro we documented various screen types and user's interactions.

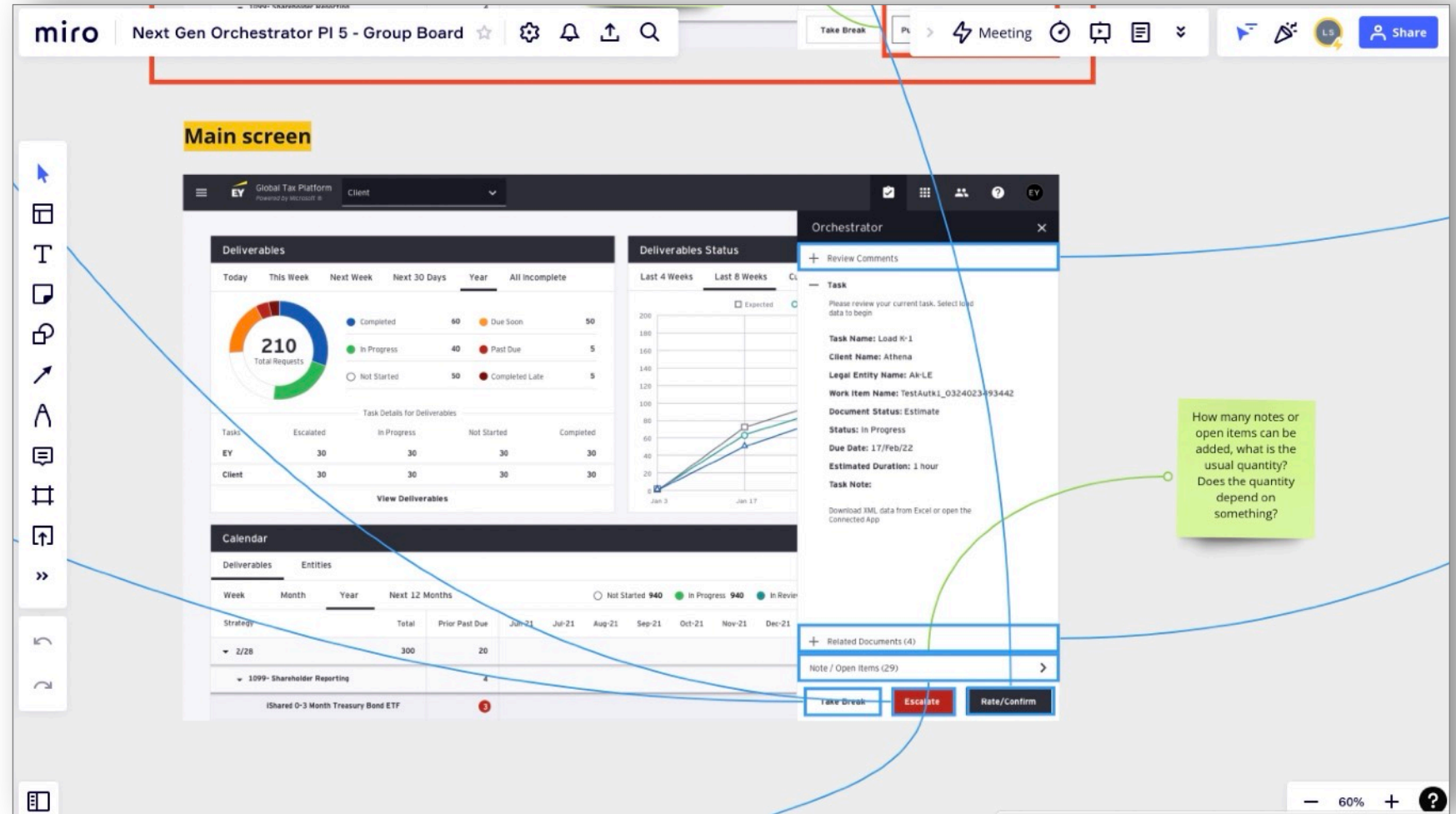
The application tracked the task users were performing and included ways to communicate to reviewers and other team members when accomplishing tasks.



# Embedding Orchestrator Into RAPToR

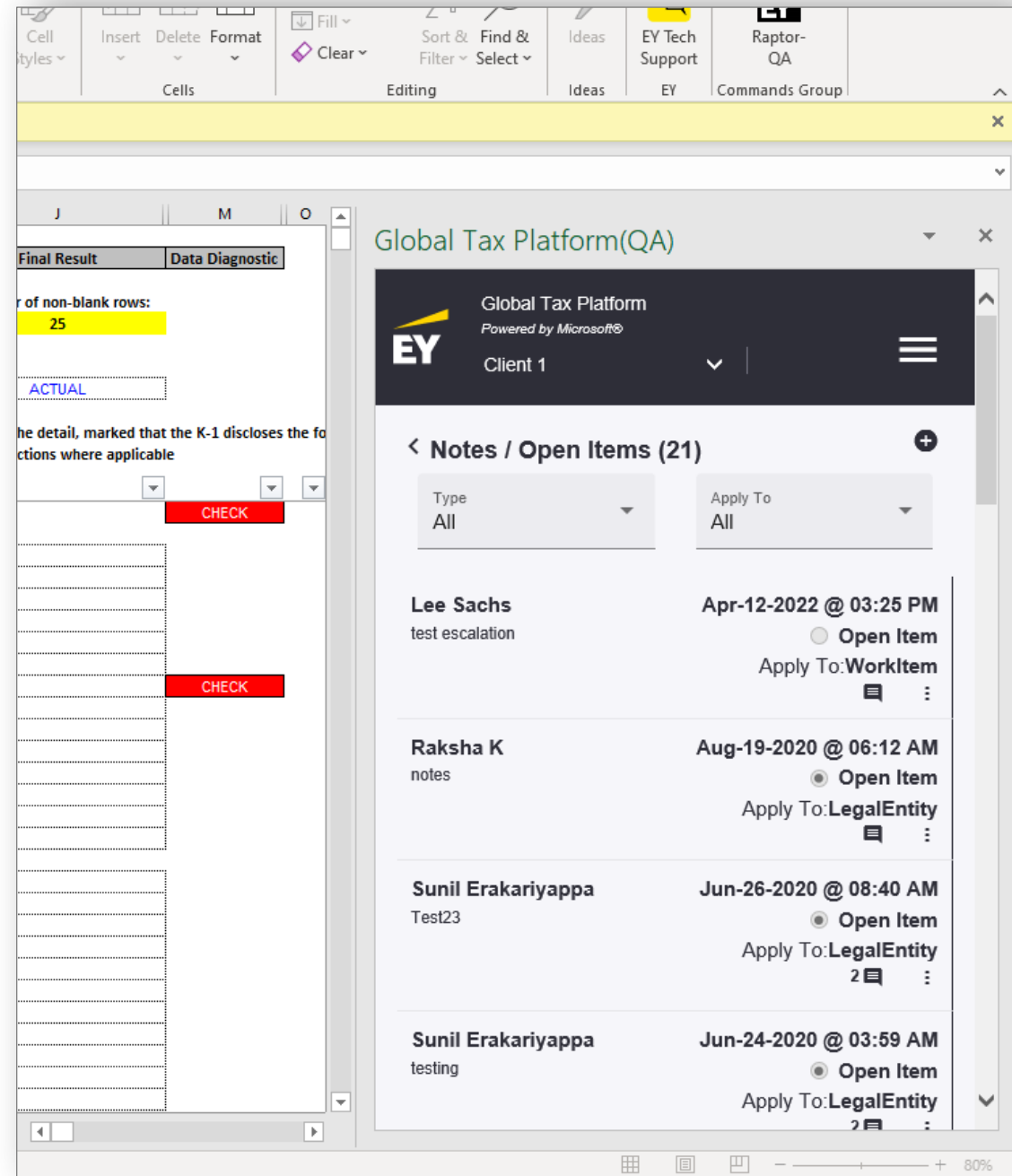
RAPToR has a whole suite of services but none of them functioned like Orchestrator; i.e. in a panel sitting beside the other applications in the main body.

We standardized the look and feel using the Design System's components and cleaned up user flow for ease of use.



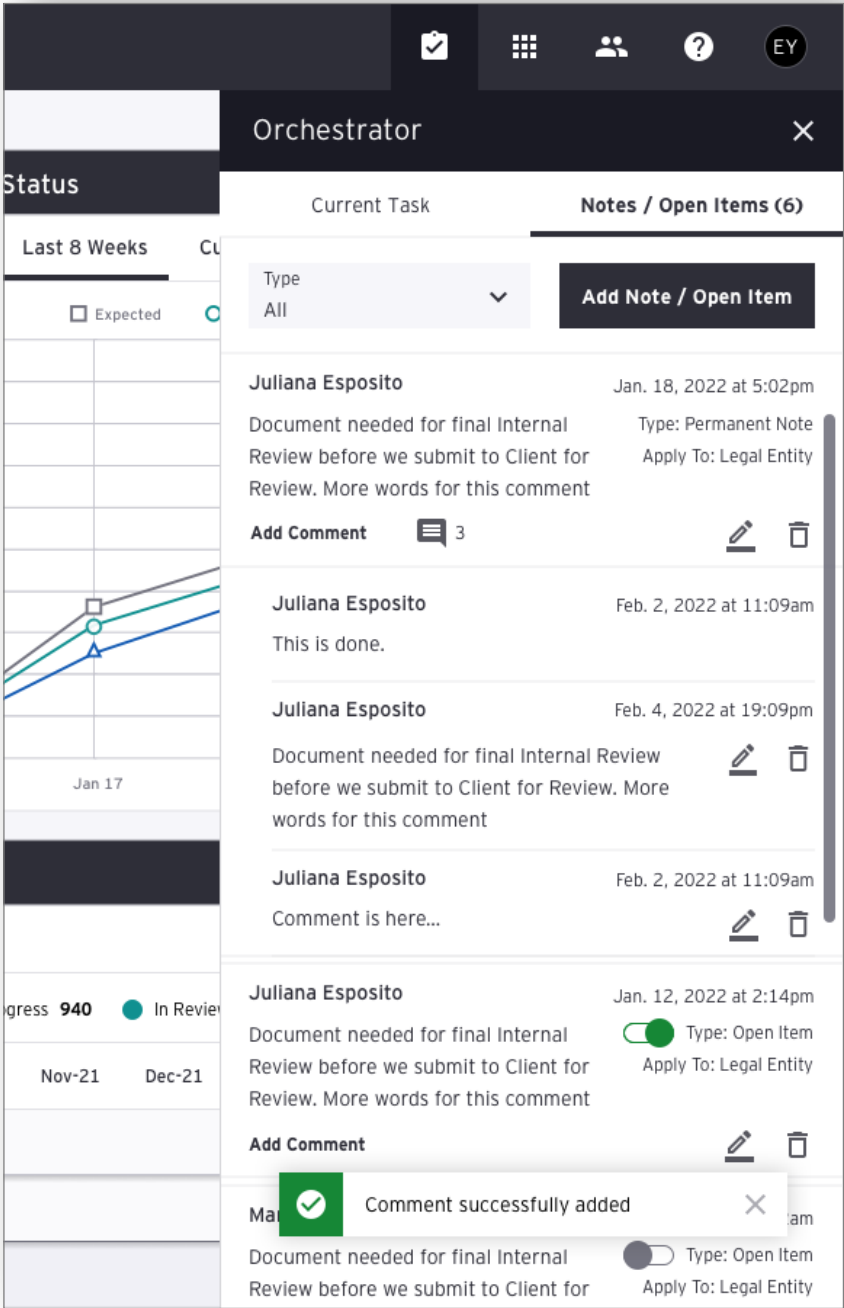
## Notes / Open Items

One area of the application was “Notes and Open Items” that contained a lot of vital communication about the task into a reduced space. The context of the Notes got lost from the rest of the application’s functions and included an overly complex set of filters for sorting.



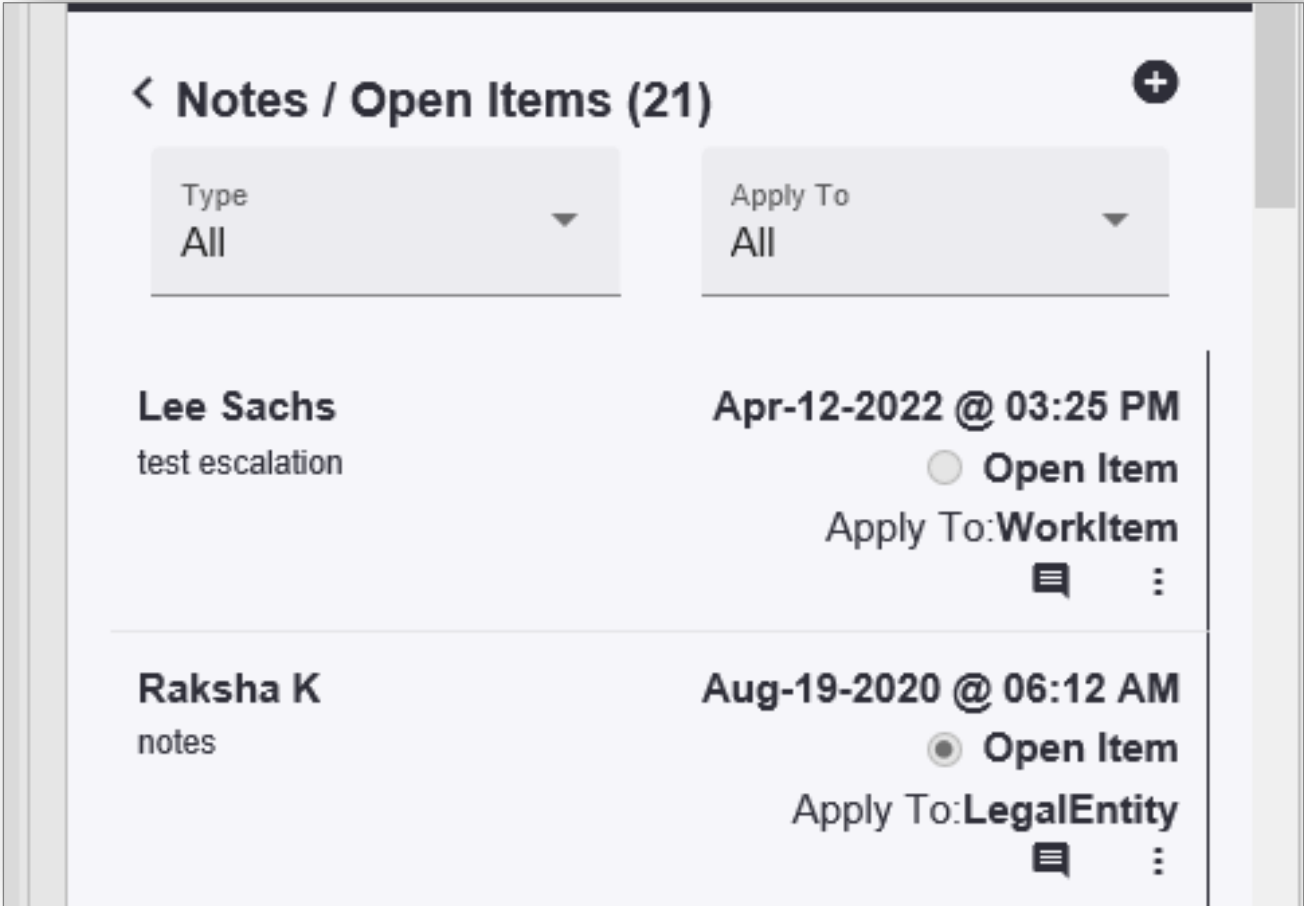
# Notes / Open Items, revised

We created a larger button for Adding Notes, removed one of the filters and added a tab to separate out the entire Notes / Open Items experience and indented comments to show the thread of the communications better.



# Notes / Open Items

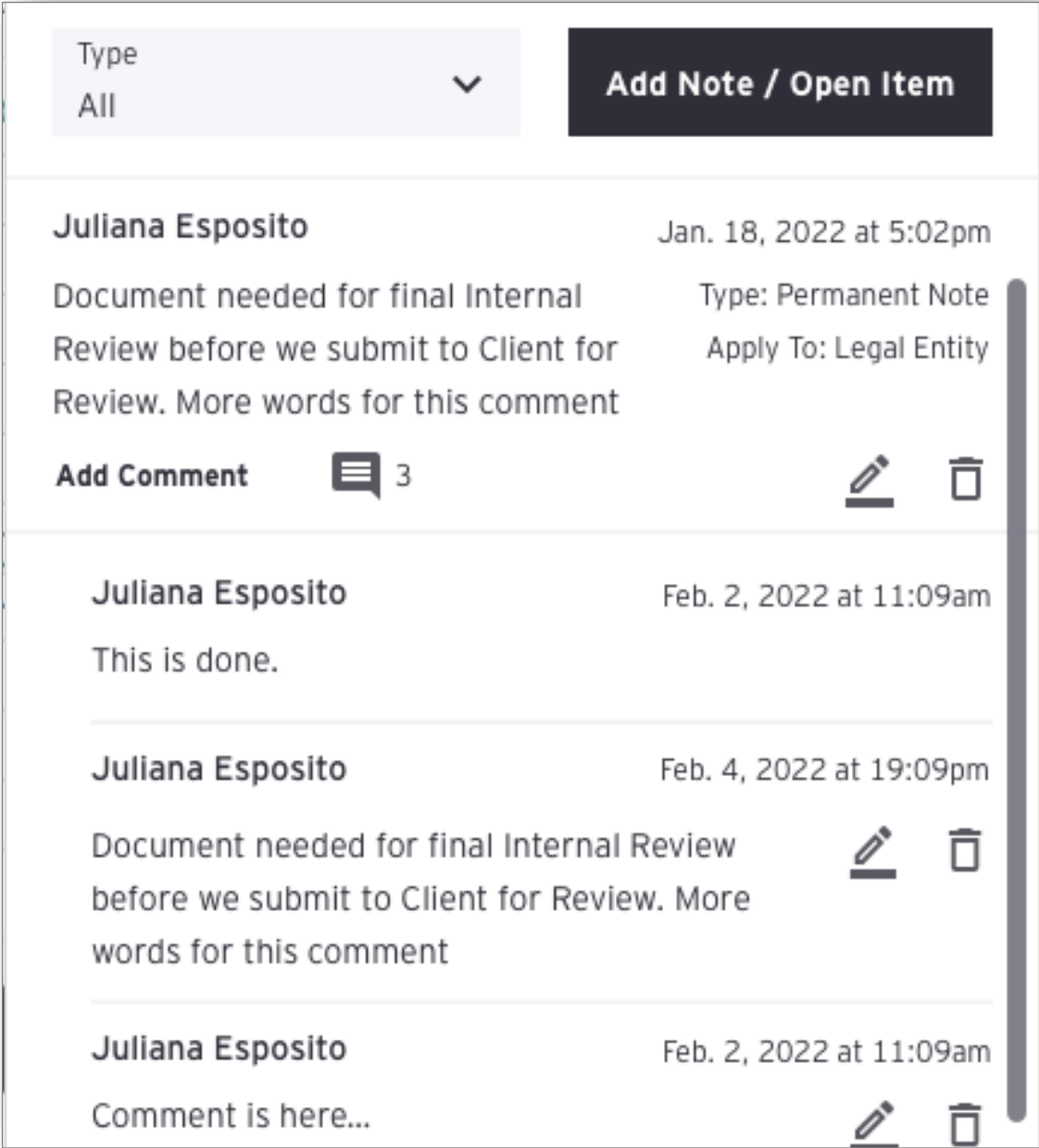
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# Notes / Open Items, revised

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# Notes, side-by-side

< Notes / Open Items (21)

Type  
All

Apply To  
All

Lee Sachs

test escalation

Apr-12-2022 @ 03:25 PM

Open Item

Apply To:WorkItem

Raksha K

notes

Aug-19-2020 @ 06:12 AM

Open Item

Apply To:LegalEntity

Type  
All

Add Note / Open Item

Juliana Esposito

Jan. 18, 2022 at 5:02pm

Document needed for final Internal Review before we submit to Client for Review. More words for this comment

Type: Permanent Note  
Apply To: Legal Entity

Add Comment

3

Juliana Esposito

Feb. 2, 2022 at 11:09am

This is done.

Juliana Esposito

Feb. 4, 2022 at 19:09pm

Document needed for final Internal Review before we submit to Client for Review. More words for this comment

Juliana Esposito

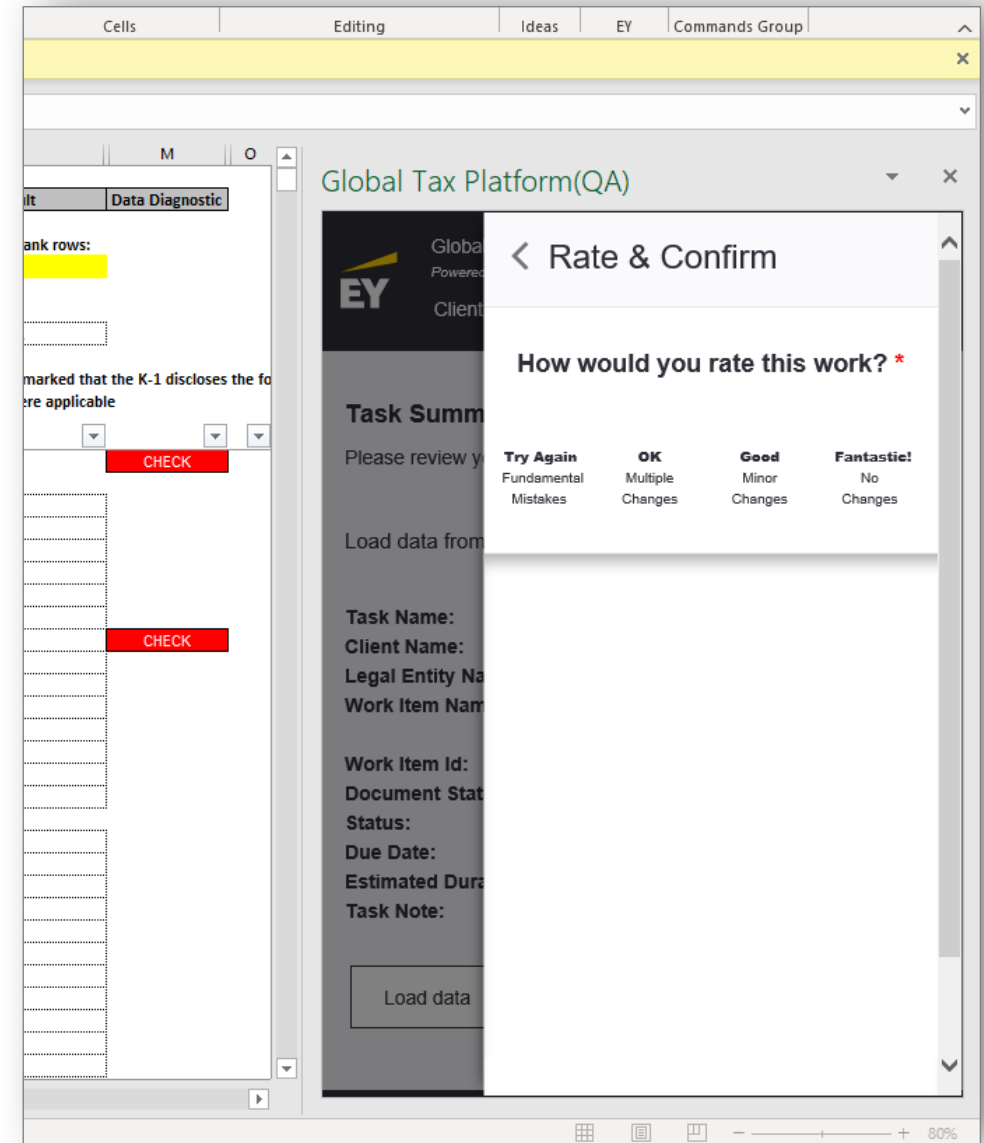
Feb. 2, 2022 at 11:09am

Comment is here...

# Rate & Confirm

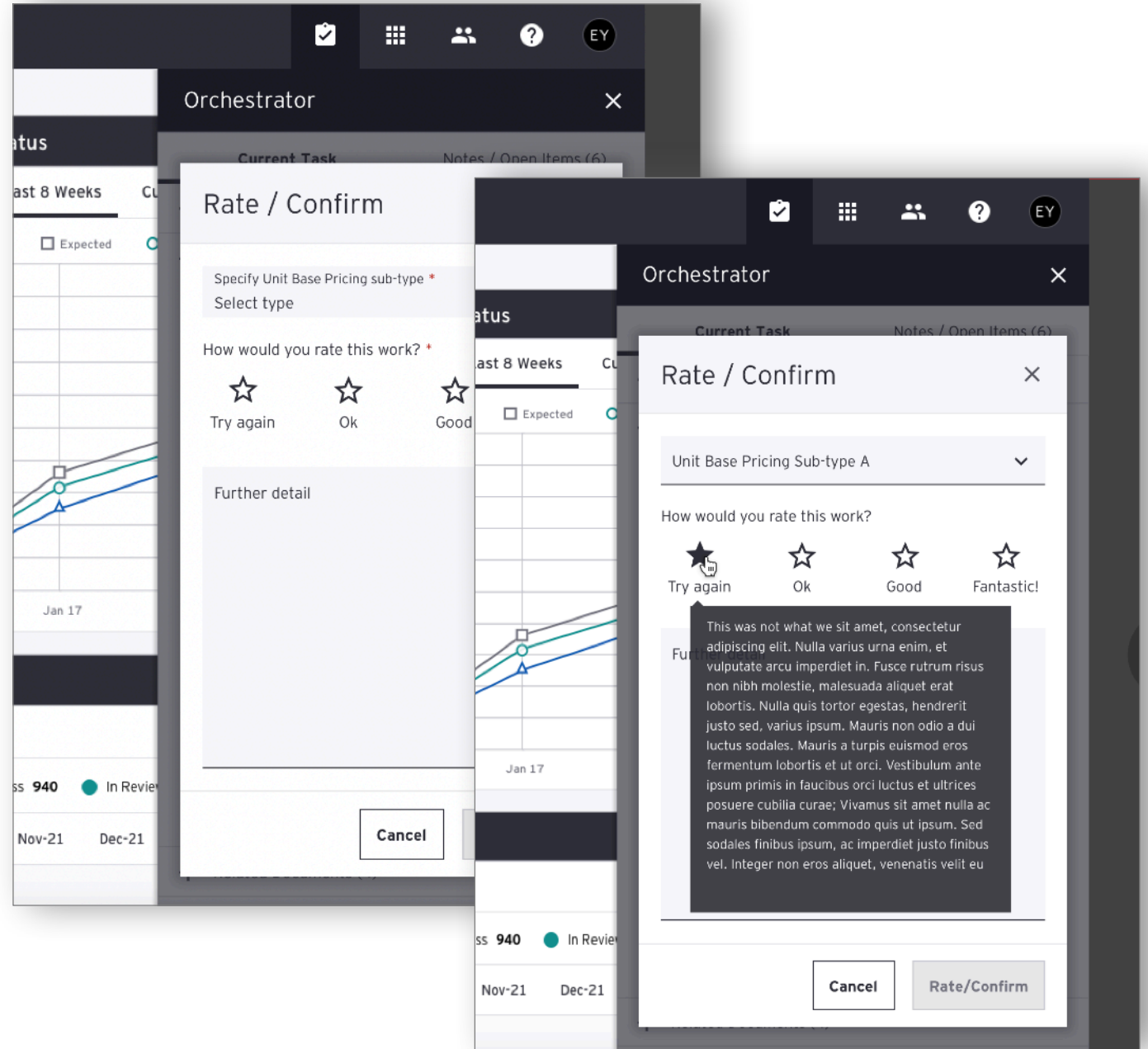
Another problem area was the Rate & Confirm section, where work was reviewed and evaluated.

This was critical as day workers had to turn around work quickly but it needed a review process that was useful. Feedback was often vague and inconsequential.

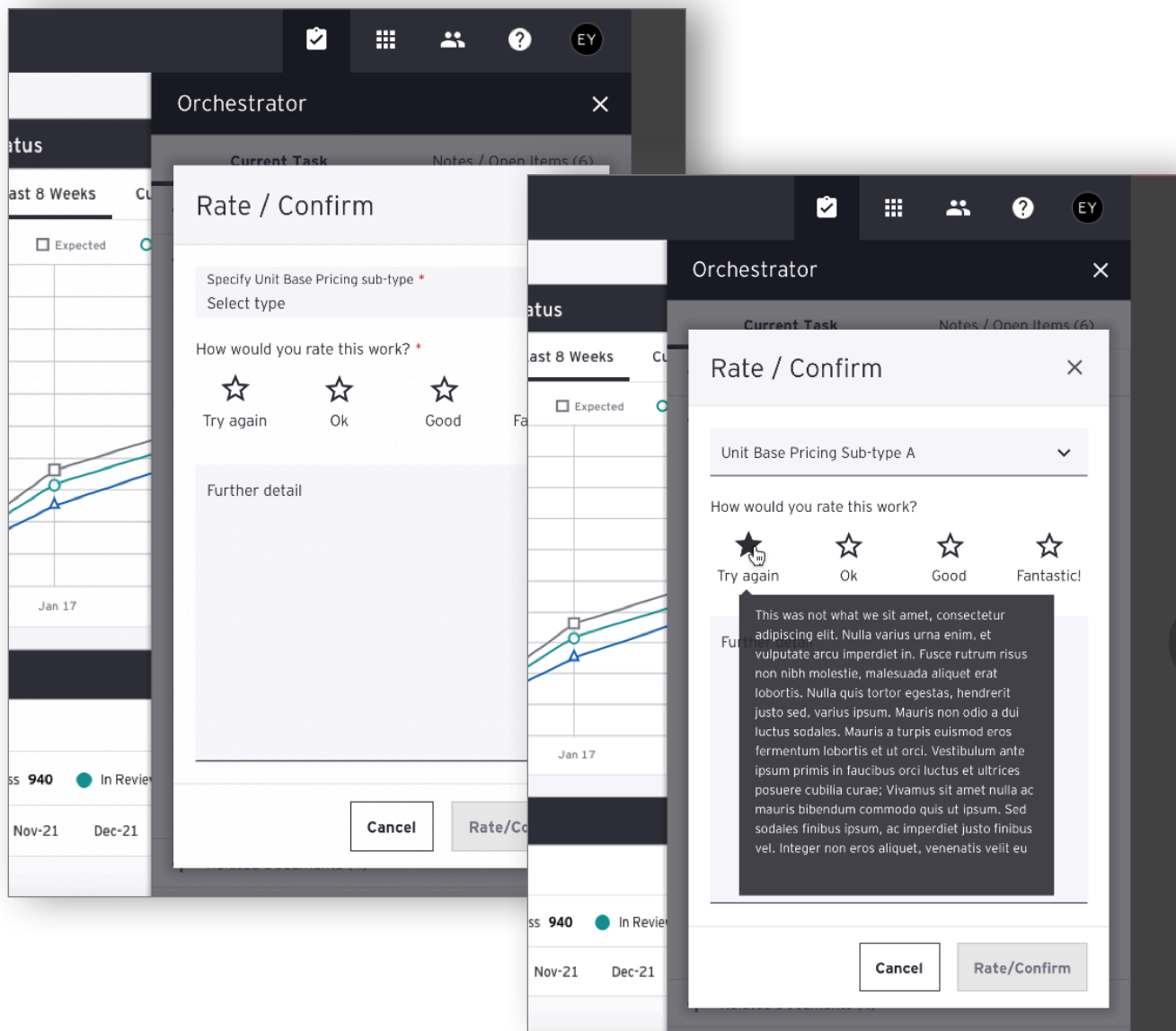
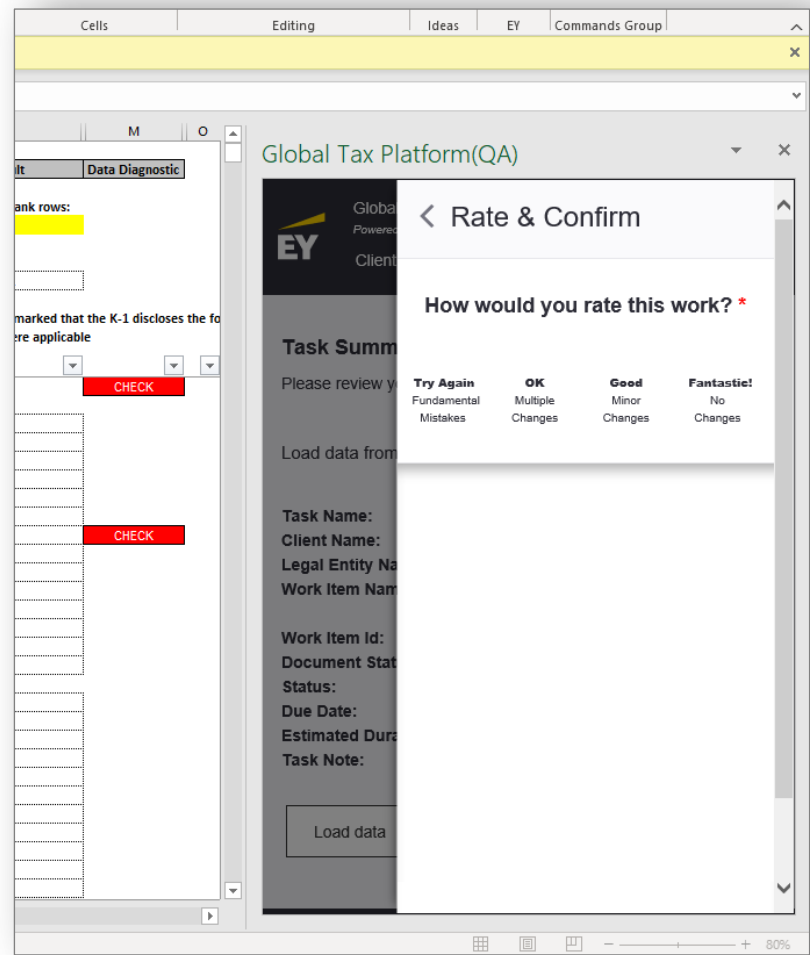


# Rate & Confirm, revised

We made use of a tooltip with the star rating to enhance the feedback and added an opportunity to add further detail if they chose to.



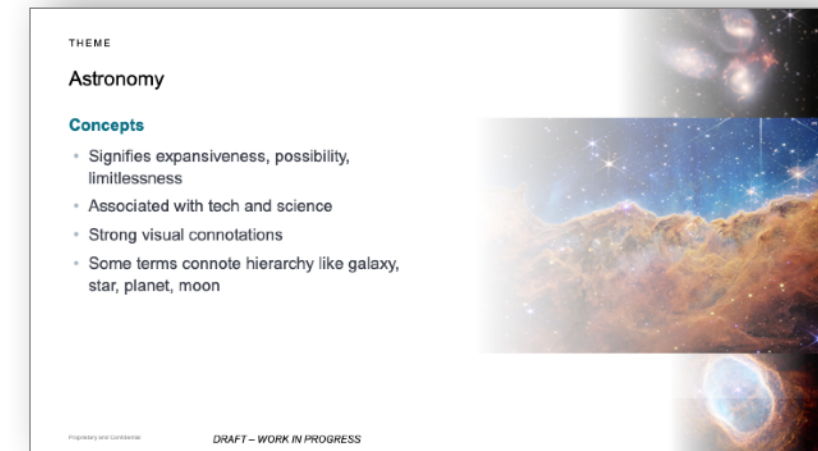
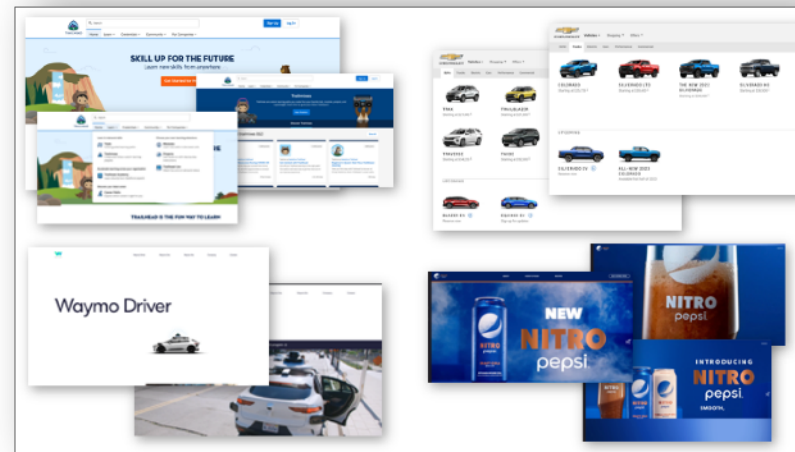
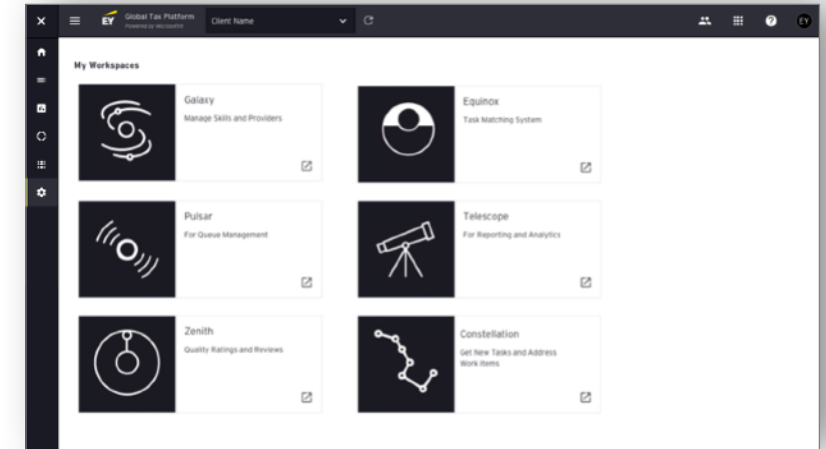
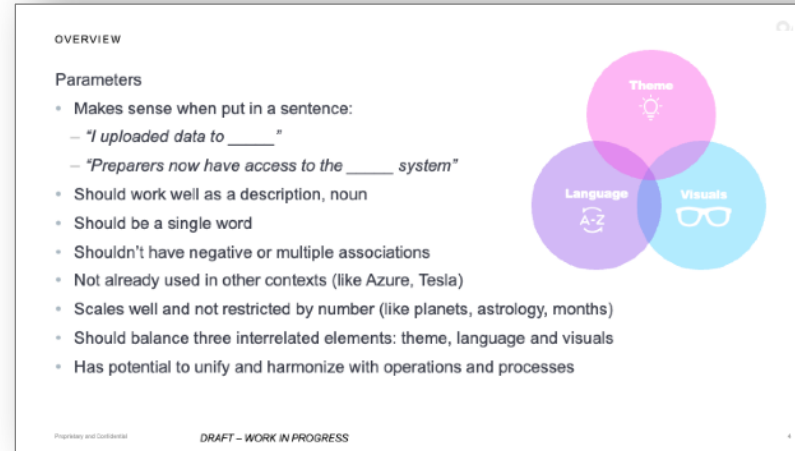
# Rate & Confirm, side-by-side



# Orchestrator Taxonomy & Nomenclature

Orchestrator as a name for an application came into question as we expanded our efforts.

This led to an entire branding exercise, exploring terminology and nomenclature for different Future of Work applications.





# User Research

Another work stream started to expand user research across Future of Work users as well as all users in the RAPToR environment, both preparers and reviewers as well as service leads and product owners.

Application Name:  
Subject Name:  
Date:  
Round:

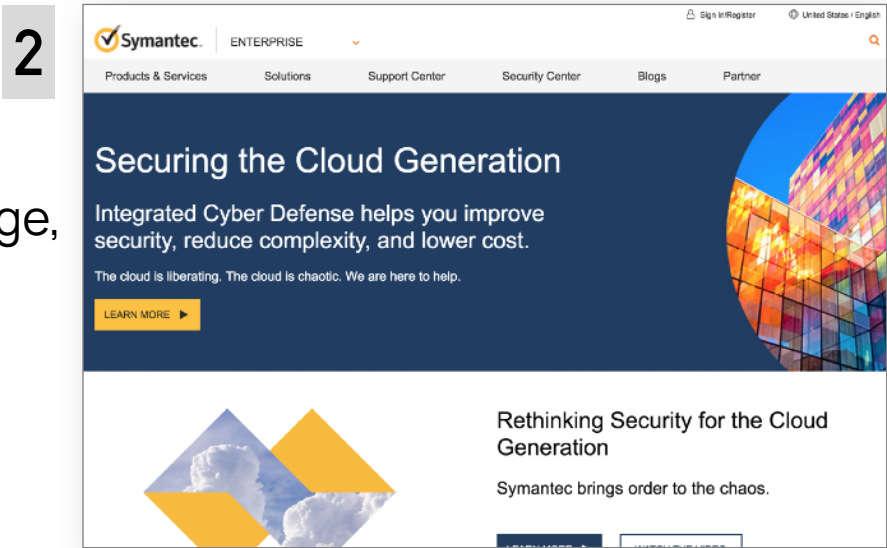
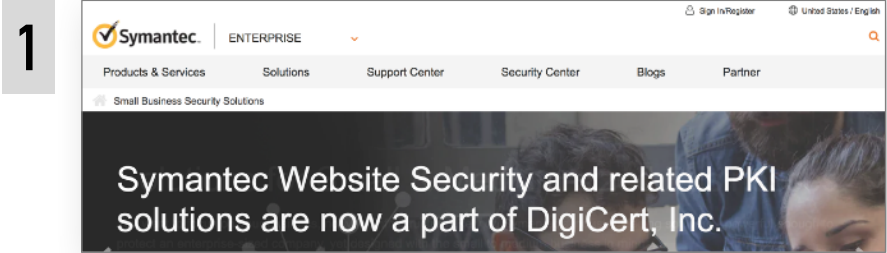
Phase of your work	Main Task								Associated/Al			
Description and definition of the tasks that define your job, what are you core skillsets												
What Actions you do to accomplish your job, the different sequence of operations; what happens before and after you accomplish tasks												
What's the happy path to successfully complete this step (sunny day scenario) (day in the life, top 3 tasks)												
Barriers & challenges to accomplish tasks												
What other tools and applications are you using; what other associated tasks are you performing												
What are the groups and roles involved in the process of doing your job or related work?												

# Symantec Small Business Ecommerce / PwC

- Description:** Symantec sells over \$15 million annually of cybersecurity software through their small and medium business eCommerce enterprise platform. New products were scheduled to be introduced and others were expiring along with a different pricing and bundling options.
- Situation:** As part of Symantec.com's global online presence, the SMB platform got little internal attention from data analytics to supporting infrastructure. A legacy of nomenclature from previous iterations along with poor navigation hampered the sequence from product landing page to product selection through to cart and checkout.
- My Role:** I was the UX lead with a small team which comprised a visual designer, content strategist, digital strategist and engagement lead; included a great deal of client-facing engagements and content analysis with support from PwC strategy resources
- Solutions:** Eco-system diagram, user flows, content matrix, wireframes for mobile and desktop, guidance on visual direction

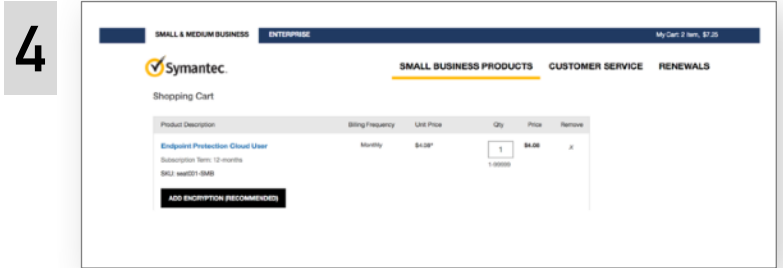
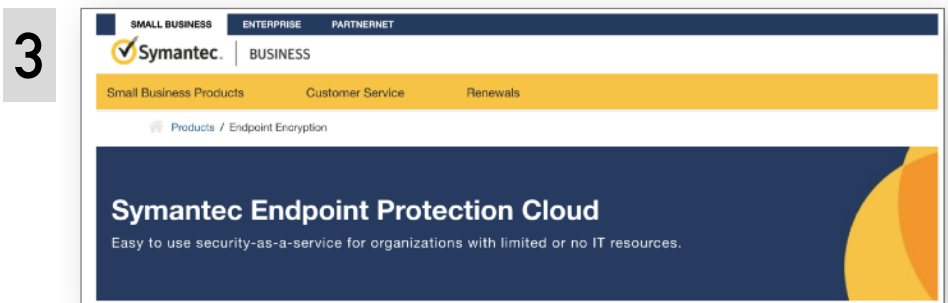
# Current Problems: navigation

Global navigation, symantec.com

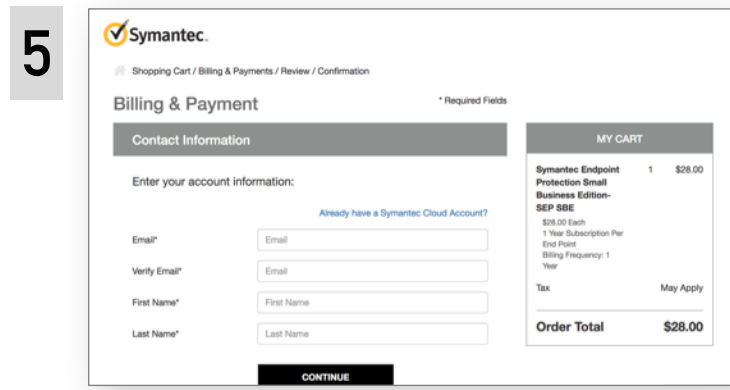


Navigation from  
SMB Landing Page,  
consistent with  
global nav

Navigation within SMB Product  
Landing page changes...



...changes again  
in product  
selection...



...and yet again in the purchase flow

# Ecosystem Diagram

Initially, I examined the full range of obstacles that kept users from going directly to buy on all of Symantec.com globally and other channels (email, media, collateral). This exercise helped but was a bit of 'boiling the ocean.'

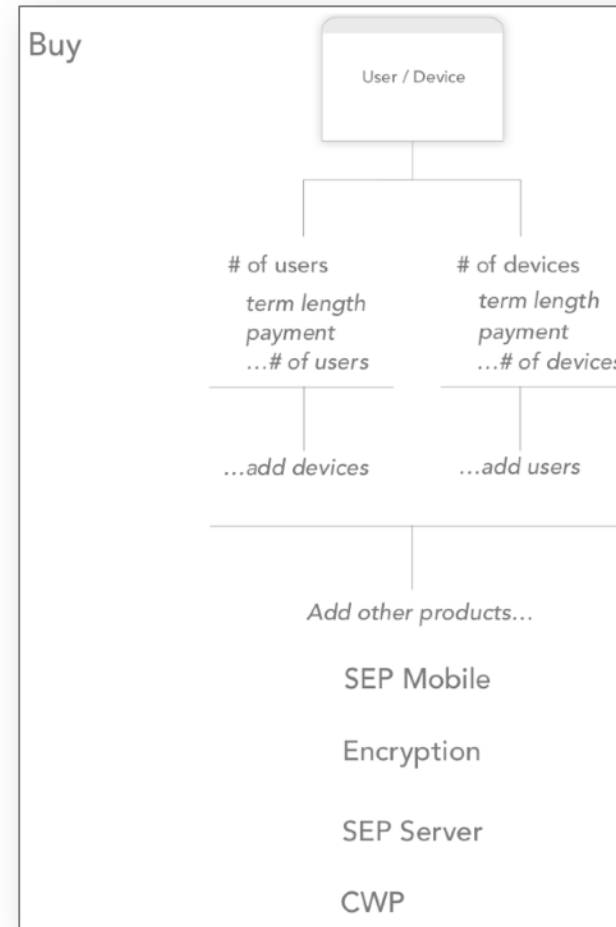
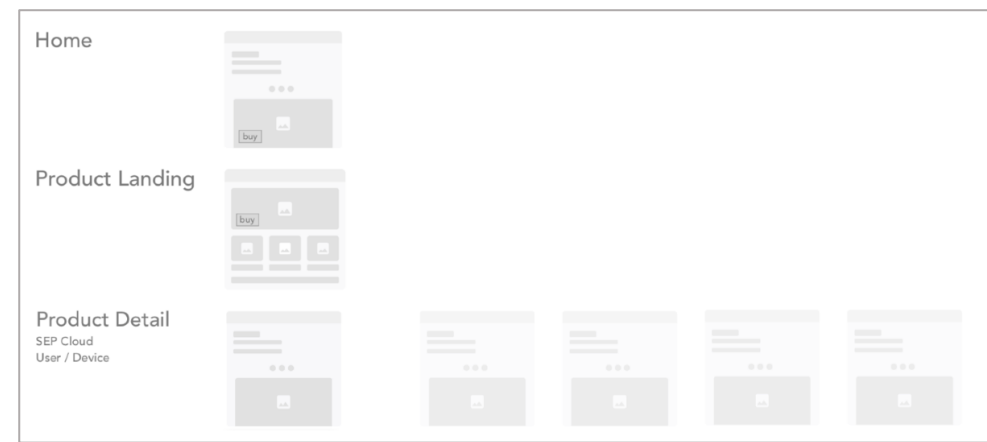
The business needed a more agile solution to simplify the purchase flow



# User Flow and Product Selection

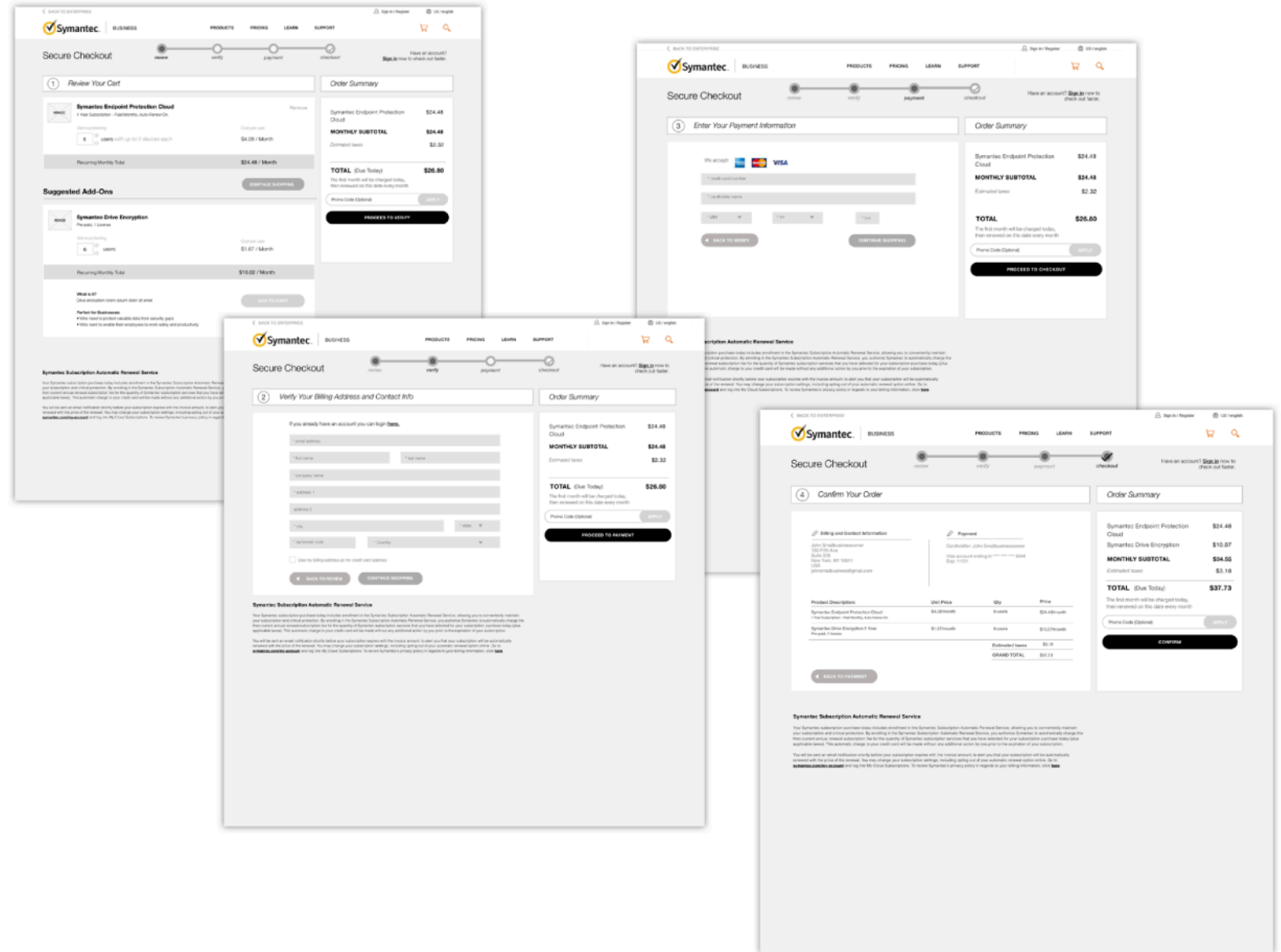
Breaking down the ideal user flow I focused on their most complex product: one with odd pricing combinations, uneven bundling assortments and variations on number of users and length of subscriptions.

Cybersecurity is complicated enough; simplifying decision making and applying better design will be vital to making the sale.



# Initial Wireframes

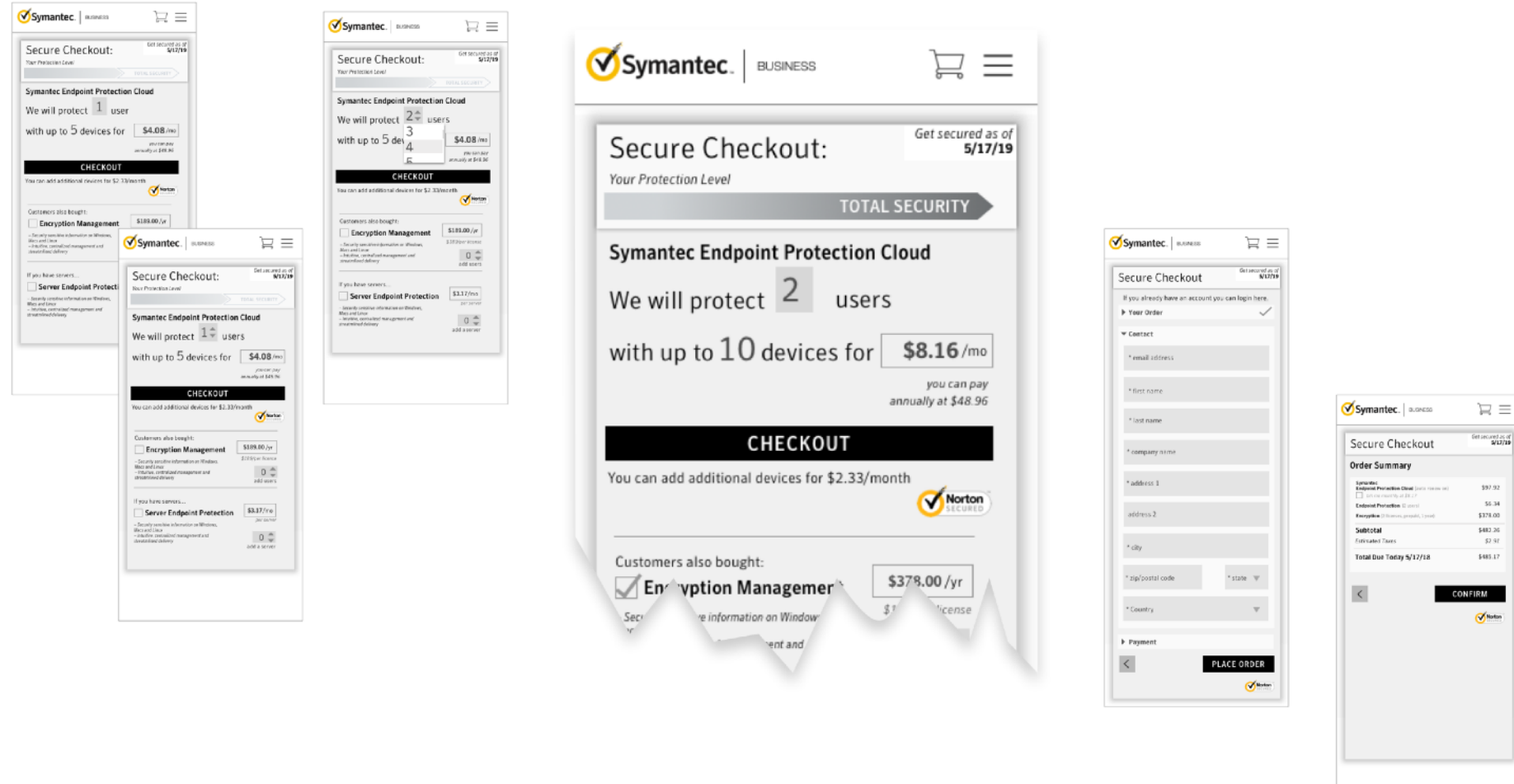
The initial pass in wireframes simply tried to frame a common UI around the sequence; much work still needed to be done around content analysis, nomenclature and layout.





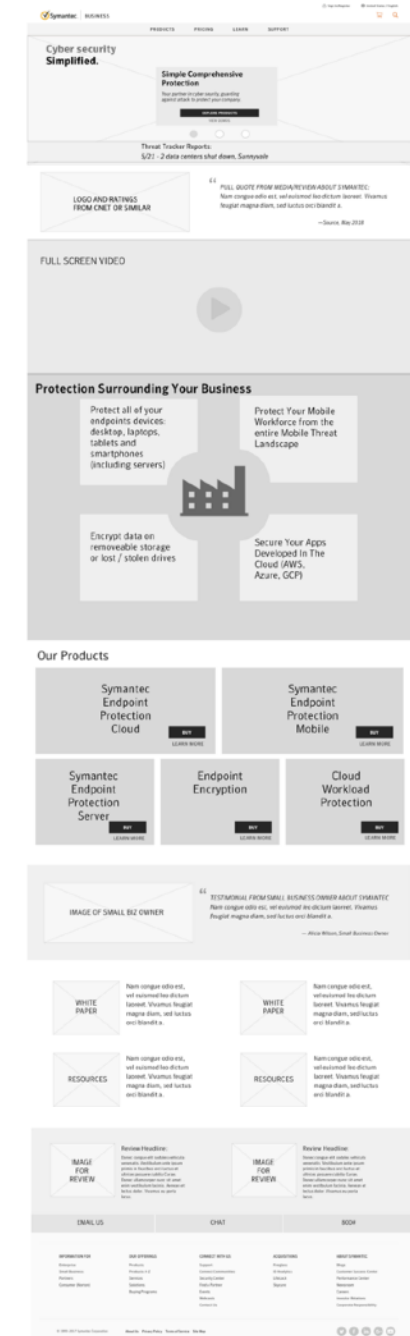
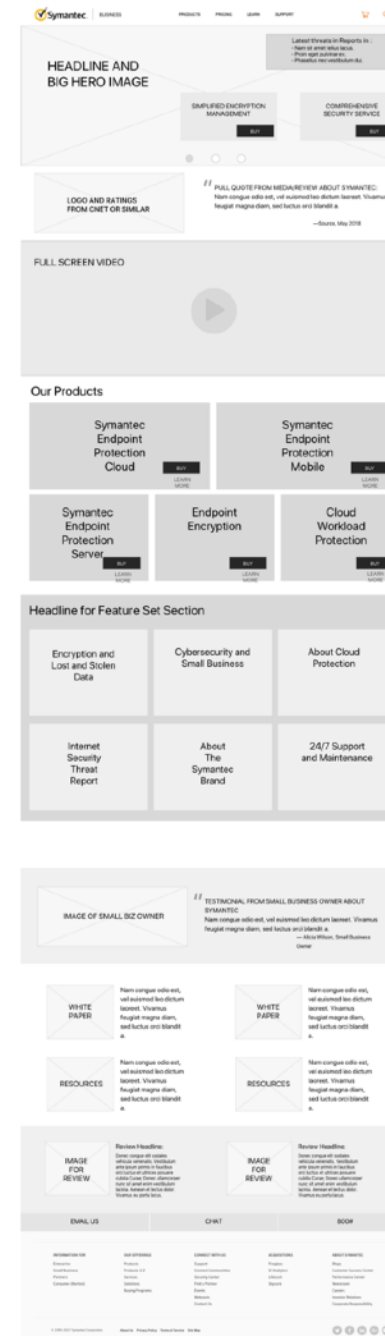
# Mobile Wireframes, 2<sup>nd</sup> round

Here we focused on mobile, and particularly on the intricacies of quantities and pricing that could be explained in an informal but structured presentation



# Desktop wireframes, 3<sup>rd</sup> round

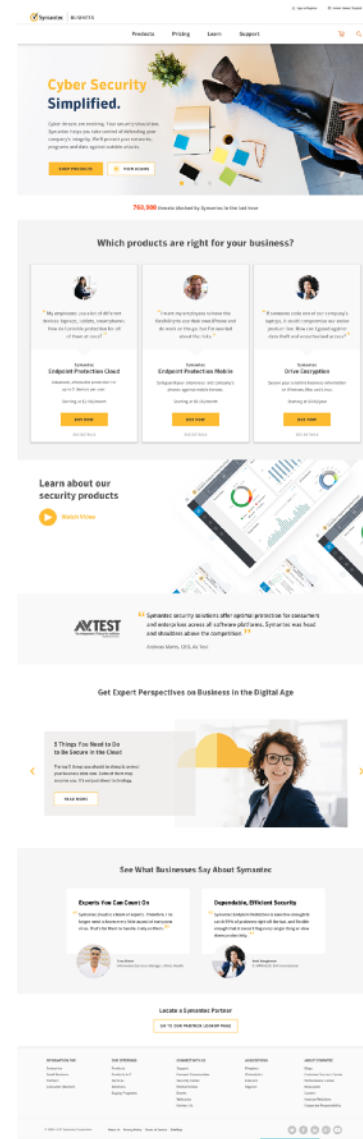
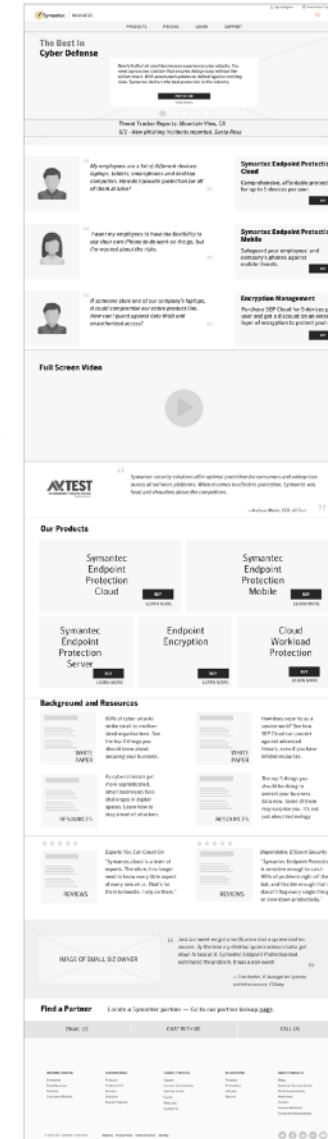
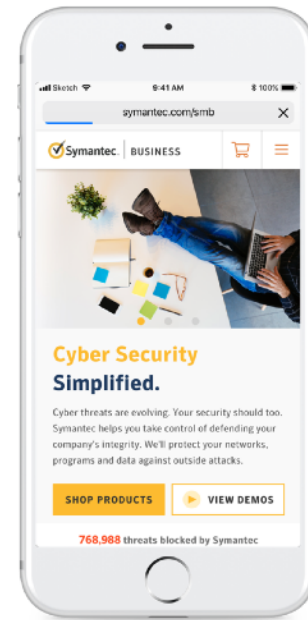
Here I expanded to desktop and started to work with a copywriter to demarcate different sections of a scrolling page for content.



# Wireframes, Copy, Comps: home page

With a visual designer applying the Symantec branding and a cleaner color scheme, along with revised copy, the site takes on a completely different shape.

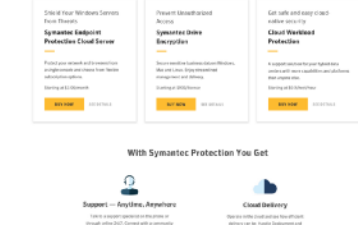
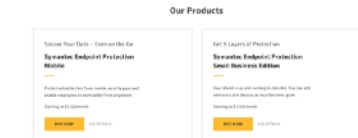
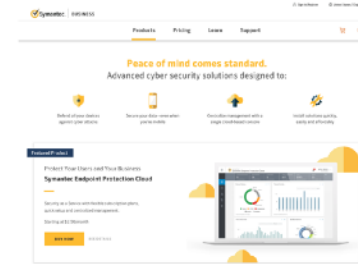
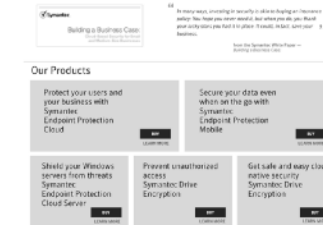
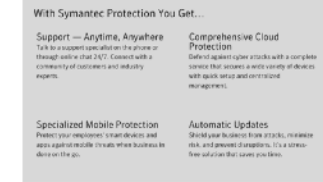
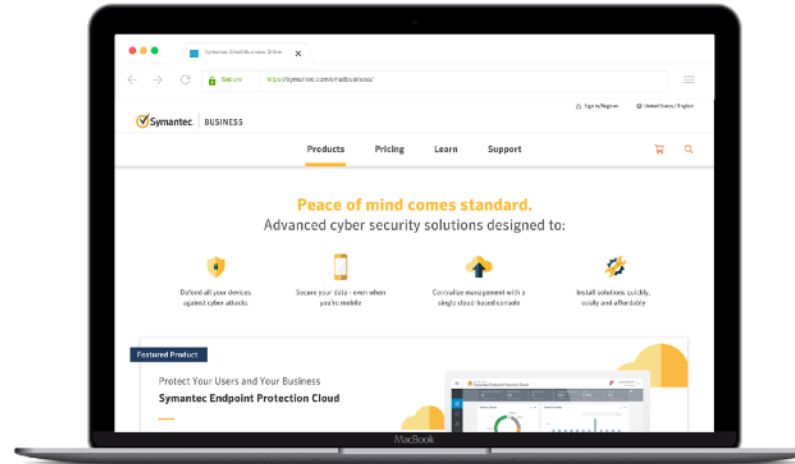
Note the full-screen wireframes in the middle correlate directly to the comps on the far right.



# Wireframes, Copy, Comps: product landing page

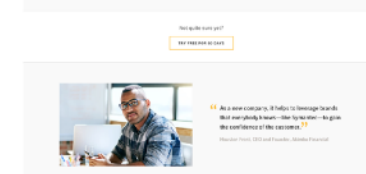
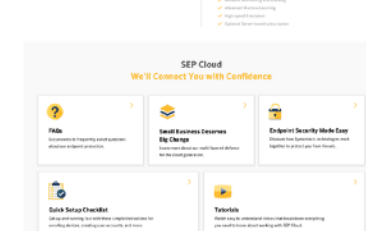
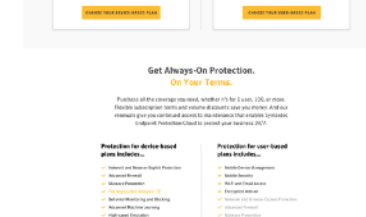
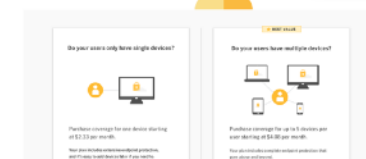
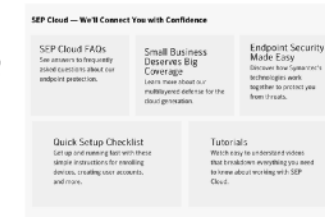
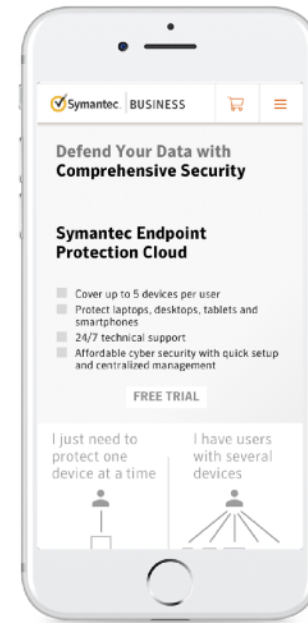
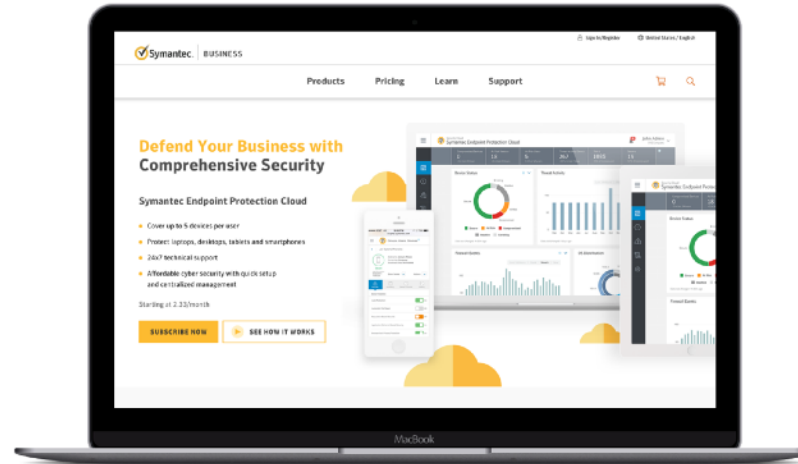
Iterating through to product  
landing page for SMB, we  
feature the hero product and  
links to all products.

At this point, mobile was not  
designed in full comps.



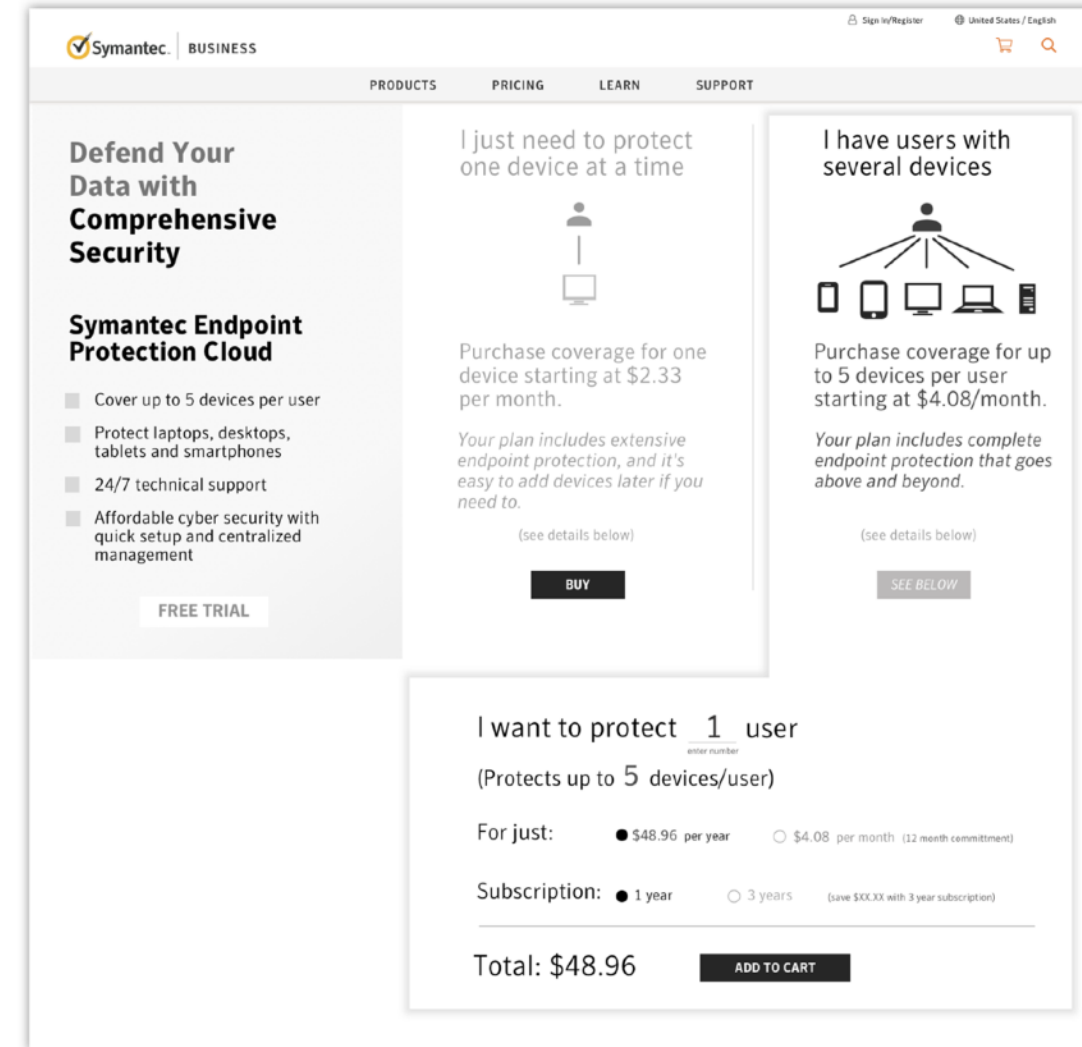
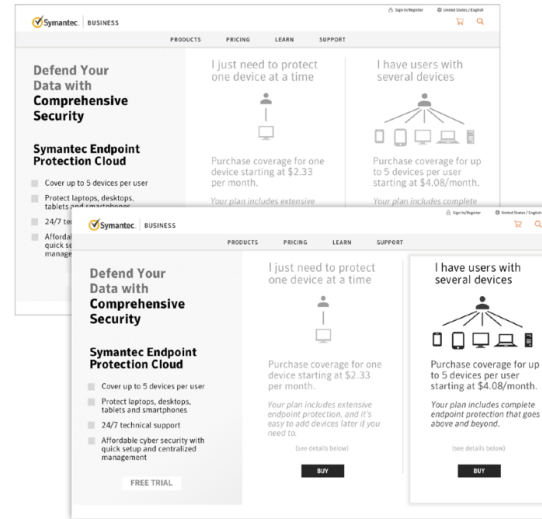
# Wireframes, Copy, Comps: specific product page

As we get to the hero product (the most complex of all products in terms of bundling and volume/term discounts), I introduce some of the basic parameters.



# Wireframes, Copy, Comps: specific product page, buy

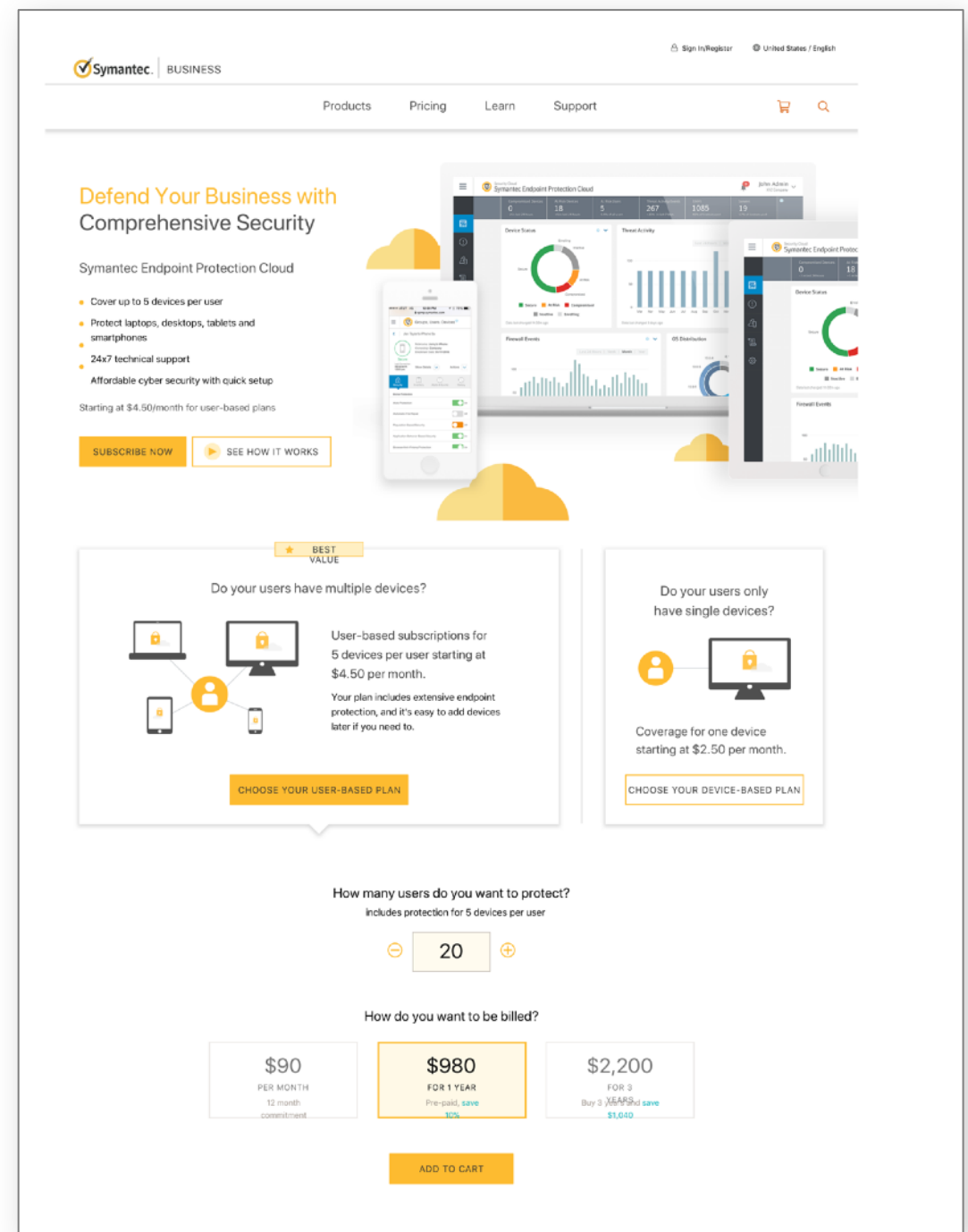
As the user engaged with this product's pricing (coverage for 1 device per user or coverage for 5 devices per user), we introduce an interactive component to pricing out the options and help them learn more before buying.





# Wireframes, Copy, Comps: specific product page, buy

Here the visual design is applied to the same premise in the wires with the panel revealing additional pricing, options and terms

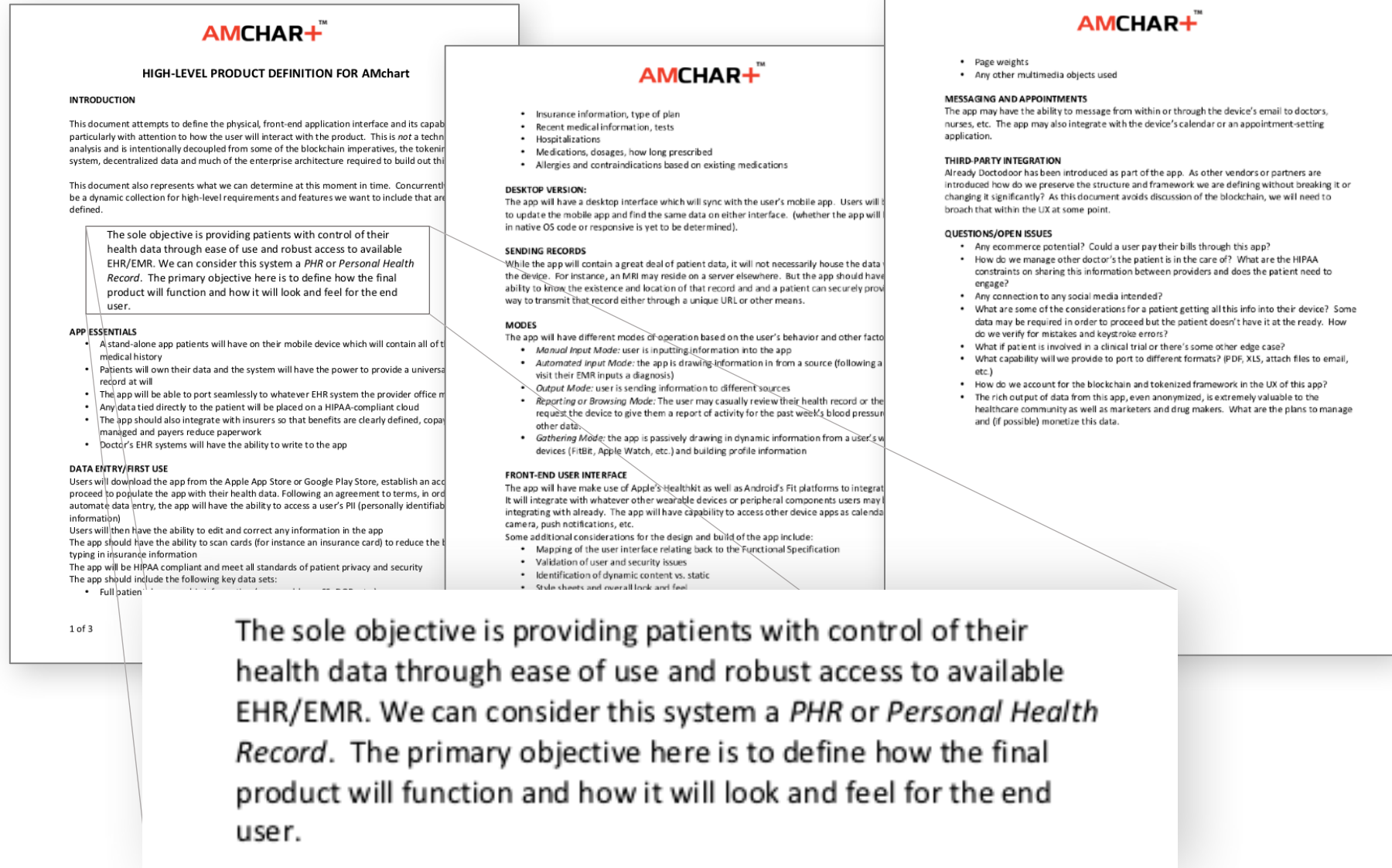


# Amchart / Amsysis

- Description:** Two leaders at Amsysis, a managed services provider, had a brilliant idea: create a portable health record that unified patient data by integrating with existing EHRs (electronic health records), diagnostic medical systems, patient-physician communications and IoT health monitoring apps and devices.
- Situation:** An ambitious undertaking complicated not only by the span of health records but also the integration of blockchain architecture. The project is further fragmented by a small team dispersed around the US and India almost entirely of developers with little awareness of UX. It was up to me create a product definition and user journeys that could rapidly be deployed and married to a UI framework.
- My Role:** I come onboard and learn the team does not have a full understanding of the user or defined the product they are building. In this case, no amount of sitemaps and wireframes will make the team comfortable with UX unless I build a foundation of documentation.
- Solutions:** UX best practices, product definitions doc, user types, personas, sitemap and user flow, wireframes and creative direction

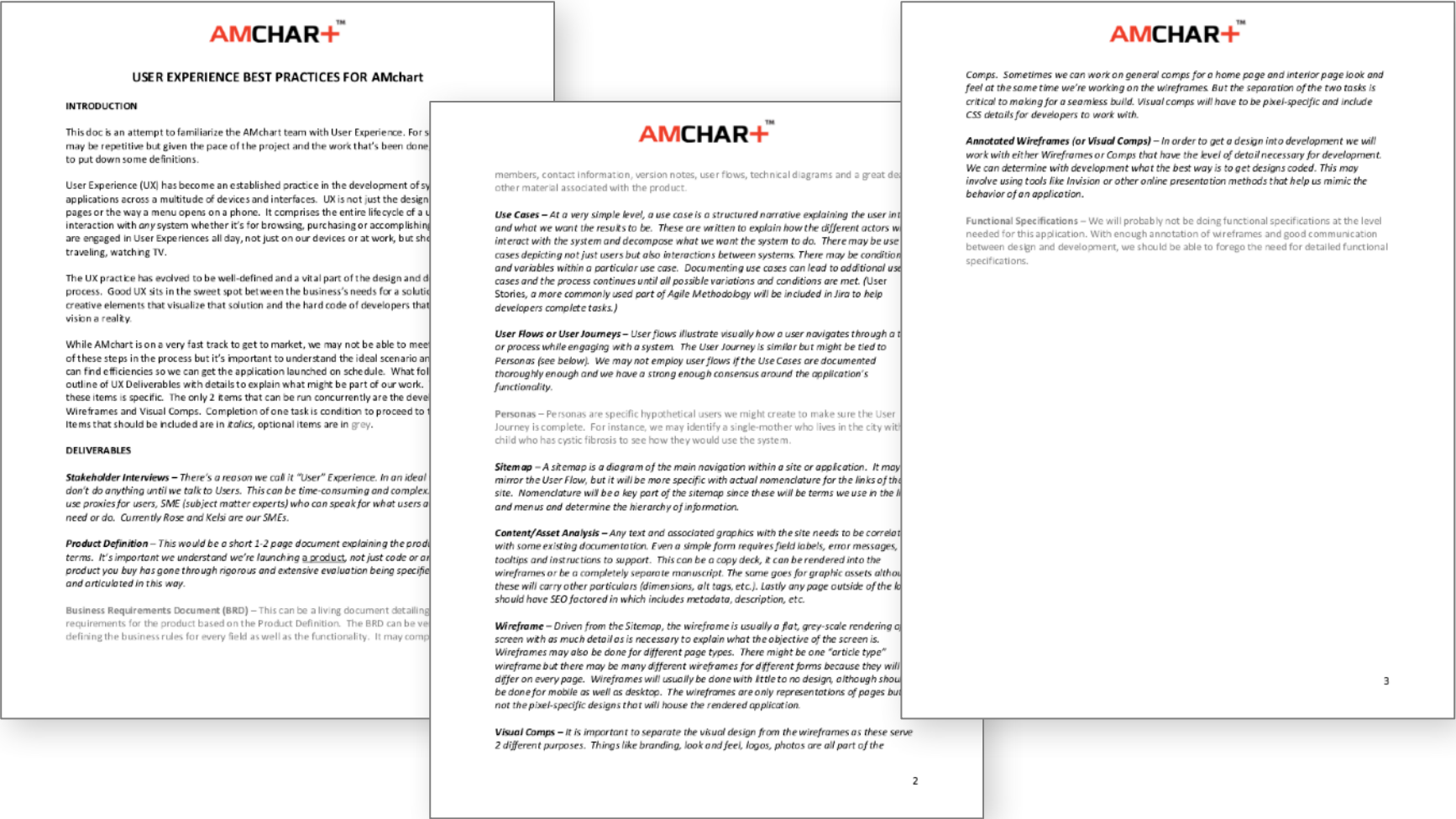
# Product Definitions Document

This product definitions document was crafted expressly for this product based on the needs of the project and the business objectives. Business owners and developers could appreciate shaping the product into plain language.




# UX Best Practices

This document was written expressly for this team and not simply copied from an online source like Wikipedia.



# User Types

With a population that could include every possible patient and every possible HCP (healthcare professional), the user population could be virtually anyone. We needed to focus on particular user types: here defining just the staff of an ambulatory office (typical GP/PCP HCP and staff).



**USER TYPES – AMBULATORY OFFICE**

**Ambulatory Office USER TYPES**

In our discussions about EHR/EMRs, we started with the list below of *Roles By Title*. Then at tasks that the front-office does, then tasks (or artifacts) that result in the examination.

While we build for “family practice” or “community health clinic” operations, our system is for any specialist since it can capture anything that happens in the exam. I listed out Key and Optional Facilities just for reference.

We also need to consider how we would assign these roles to users in our system. The combined depending upon the size and type of office. But we need to think about the controls we want to permit users. If we document the features first, we can then assign features to each role. We can also offer to customize the systems for the office (for a fee) to let them do their own customization.

**ROLES BY TITLE:**

**Front Office (*these roles may overlap depending upon the size of the office*)**

- Receptionist (In/Out)
- Receptionist Check In
- Receptionist Check Out
- Referral and Authorization Coordinator
- Referrals Coordinator
- Authorization Coordinator
- Worker’s Comp specialist


**Back Office**

- Medical Assistant
- Rooming Medical Assistant
- Scribe
- Nurse
- Nurse Practitioner
- Physician’s Assistant
- Physician
- Resident
- Medical Student

**Administrative**

- Office Manager
- Billing Coordinator
- Outside vendors needing to access records (read only)
- IT / IS Staff

1 of 2



**FRONT-OFFICE TASKS:**

- Make appointments
- Register/Intake
- Check-in patient
- Assign room, notify back-office staff/HCP
- Examination (see “Tasks...” below)
- Record visit
- Billing
- Set next appointments

**TASKS IN EXAM:**

- SOAP Notes
- Blood work
- BP
- ECG/EKG
- Specimen/Culture
- Immunizations/Shots (or Rx)
- In-office radiology or other tests
- Diagnosis
- Rx or Plan of care
- Referrals
- Followup visit, instructions/notes for back-office staff?
- Others??

**KEY FACILITIES:**

- Family practice / GP
- Community Health Clinic

**OPTIONAL FACILITIES:**

- Pediatrician
- OB/GYN
- PT
- Cardiologist/Pulmonologist
- Gastroenterologist
- Ophthalmology
- Neurology
- Orthopedist
- Dermatologist
- ENT
- Dental?
- Psychiatry/Behavioral Health?

2 of 2



# Personas

With SMEs we developed personas from our user types for both the ambulatory office staff as well as different types of patients.

## Patient Side: Parents With Children (including minors)

- **Demographics:** 25-55
- **Behaviors/beliefs:** always on-the-go, parenting responsibilities
- **Goals/motivations:** protective, concerned, want to have a trusted "digital medical advisor", easy and user-friendly interface, want to save time (all tasks on the platform take 5-8 min max), motivated to stay on top of their/kids' health
- **Primary acquisition channel:** email, provider,
- **Primary device:** desktop/laptop, tablet, mobile
- **User type:** group/family

## Ambulatory Side: Receptionist

- **Demographics:** any age
- **Behaviors/beliefs:** multi-tasking (on the phone, greeting patients, referrals, mail)
- **Goals/motivations:** save time/streamline check-in & check out process (collect payment, set up follow up appointments, provide patients with visit summary),

## User Types - Account Management

- Patients
  - single user
  - single user + 1 (spouse, caregiver or legal guardian)
  - group (family = 1 parent + kids (<12 yo, >12 yo) or 2 parents + kids)
- Ambulatory
  - single user

## Ambulatory Side: Office Manager/Super Users

- **Demographics:** any age
- **Behaviors/beliefs:** tracking activities, deal with complaints, staying on top of compliance,
- **Goals/motivations:** making sure that the office is generating money, patients' and employee management
- **Primary acquisition channel:** IS/IT
- **Primary device:** desktop
- **User type:** single
- **Activities:** Tracking budget, billing, payments, records audits, tracking charts, logs, users, often everyone is afraid of them, coordinate with

## Patient Side: Senior Citizens (could overlap w/Baby Boomers)

- **Demographics:** 60+
- **Behaviors/beliefs:** not tech savvy, apprehensive about using apps and patient portal, may have concerns about personal data exposed or misused, almost everyone will have medical issues and will visit multiple doctors/specs on a regular basis, maybe in the assisted living and/or long-term care facilities (nursing homes...), may have caregivers (children, neighbor, family member, someone from the facility) or legal guardians (medical/financial POA), they will most probably have to share their medical information with family members, DNR, get educational materials on disease states, drugs, clinical trials,
- **Goals/motivations:** stay as healthy as possible, interested in clinical trials, tracking stats, integration with multiple devices
- **Primary acquisition channel:** provider
- **Primary device:** desktop
- **Permissions:** patient portal
- **Education/content:**
- **User type:** single, single + 1, family
- **Device Integration:** Glucose monitors, O2, BP, etc.
- **Personal insurance:** Medicaid, Medicare (65+)

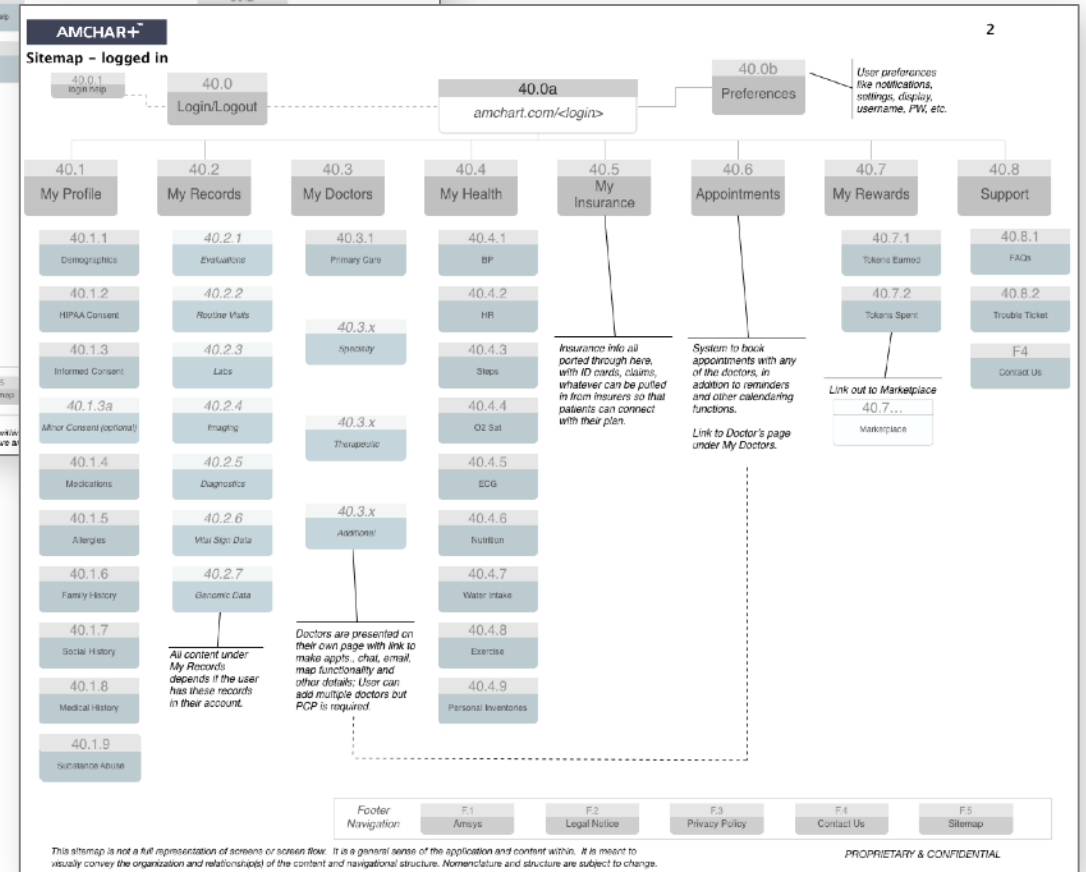
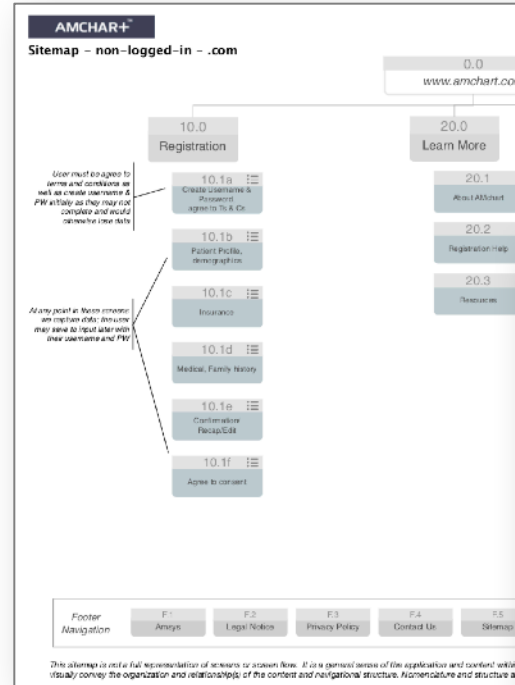
## Acquisition channels

- Social - FB, Twitter, LinkedIn, Sermo, Doximity
- Emails
- Doc 2 Door app (fitness app)
- SEM
- .com
- Marketing campaigns
  - Online marketing, SEM, digital media, affiliates
  - Other healthcare entities (providers, insurers, pharmaceutical companies, KOLs (key opinion leaders)
  - Guerrilla, WOM (word of mouth)
  - Traditional media (print, leave-behinds, brochures)
  - Sales reps in field

# Sitemap

The sitemap was used to more as a “straw man” model to present and evaluate what a possible information architecture might look like on the web front-end.

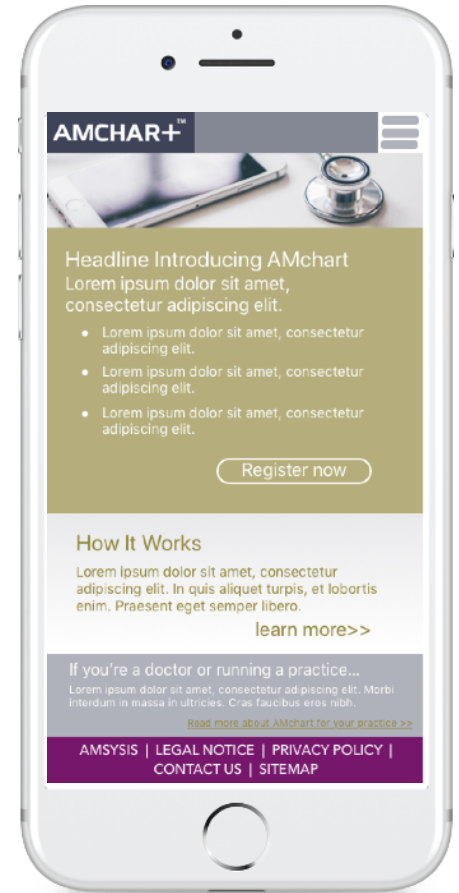
Top right is an early organization of content for logged-in users and below that a more detailed version.





# High-Fidelity Wireframes

Sometimes I must create high-fidelity wireframes ahead of a full set of detailed wires with functionality, screen types and different states. Including adequate caveats and warnings of the problems created by this methodology, I assembled a few screens which were then given to designers to further enhance.



# Amgen/Novartis / CapGemini

- Description:** Amgen and Novartis were about to launch a breakthrough drug to prevent migraines, Aimovig (erunimab). CapGemini (formerly LiquidHub) was building a patient-facing app to guide patients through accessing treatment and getting coverage.
- Situation:** As a newly approved drug for a non-life-threatening conditions, insurers would most likely not cover treatment, Additionally, this was a self-injectable medication which would require training and support. The app was critical to gaining acceptance from patients and the healthcare community.
- My Role:** As the UX lead coming in midstream, I had to quickly get up to speed on the user flow and multiple moving parts. This was particularly complex because there were literally twice as many clients as it was a co-branding effort with Amgen and Novartis. My leadership was instrumental in gaining cohesion between teams.
- Solutions:** User flows, user journey, content matrix, wireframes, support for visual design

# BV/PA User Flow

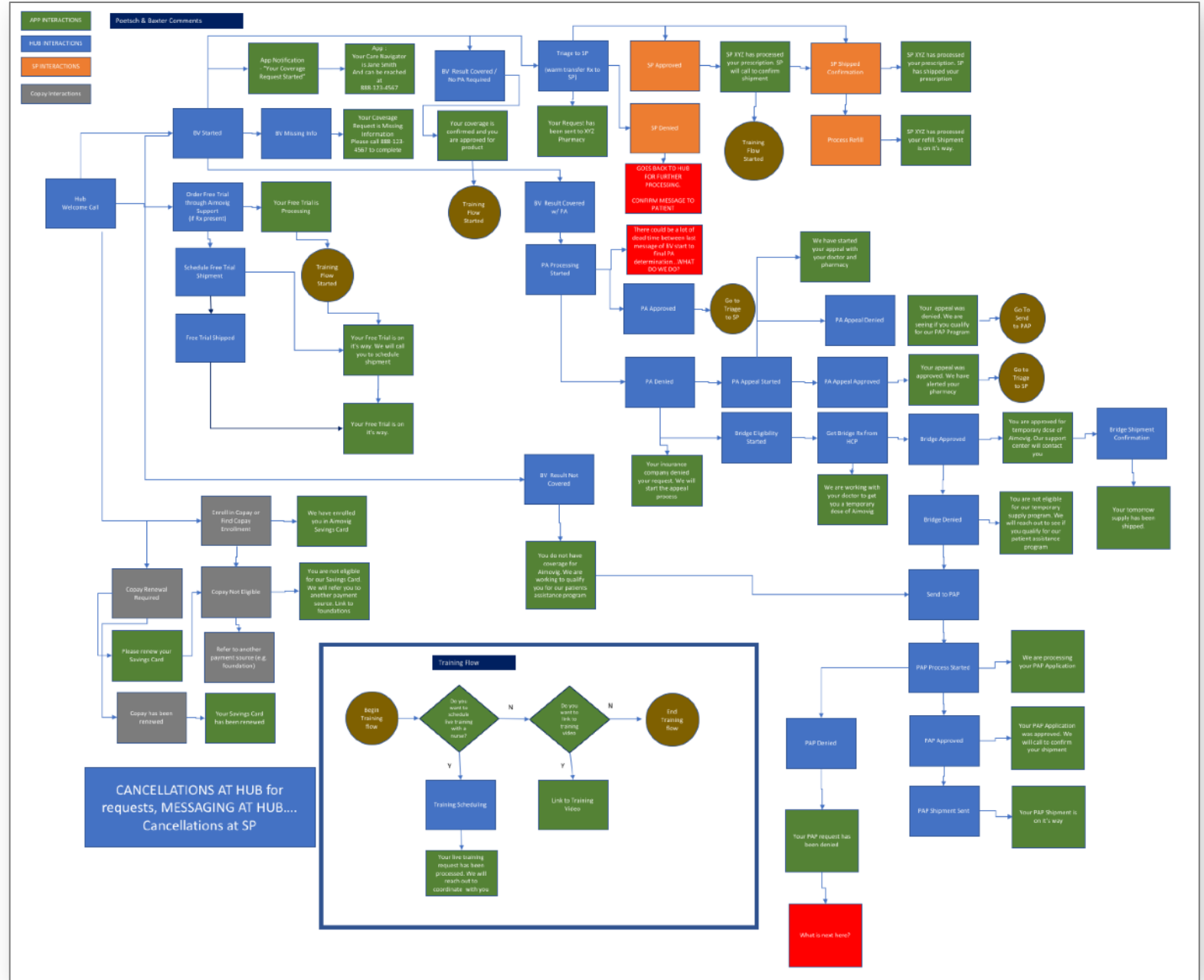
This diagram is comprehensible only to the SMEs who created it,

It needed coherent translation into a working flow that could be tracked accordingly.

Having some experience in healthcare and new drug launches, I could parse the subtleties.

BV is “benefits verification” and PA is “prior authorization.”

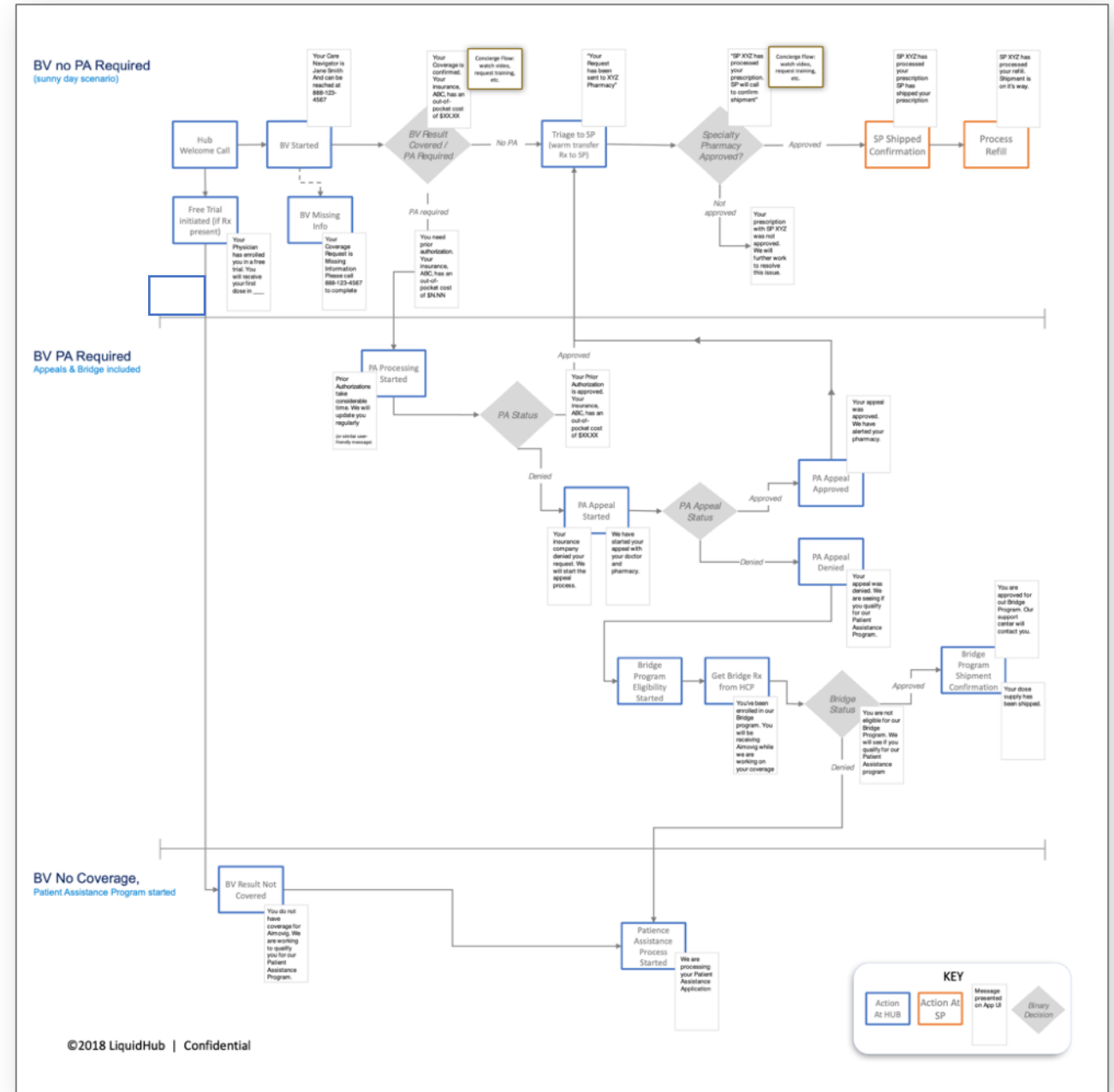
(SEE NEXT SCREEN)



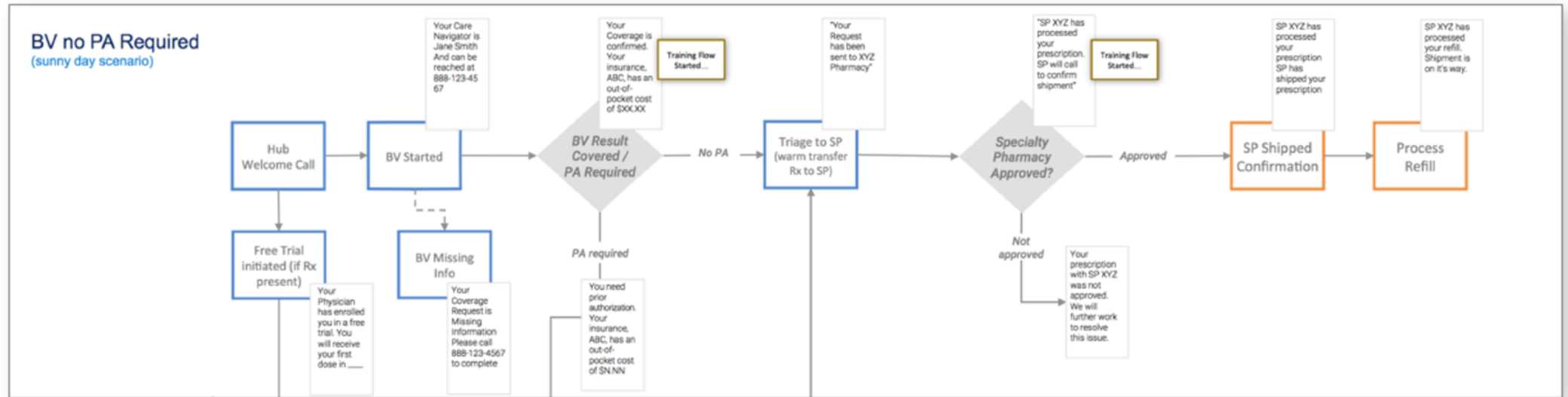
# User Flow, revised

After consultation with the SMEs I revised the document to show the logical flow and key actions the system would require. Seen here is BV (Benefit Verification) with No PA (Prior Authorization), BA with PA and BA with No Coverage.

(See following screens for detailed breakdowns of each phase)

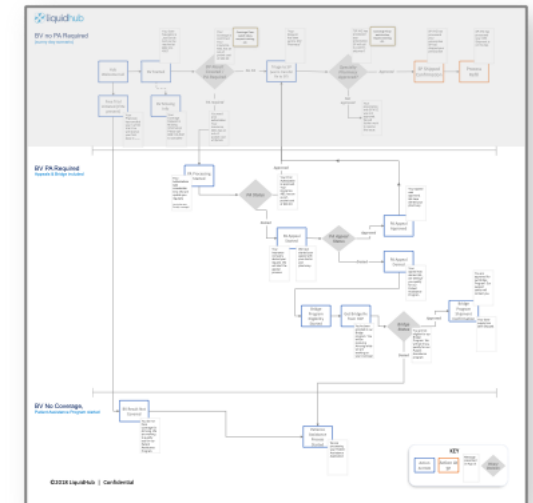


# Flow Details



In the 'sunny day' scenario, the user gets coverage from their insurer and is able to get the drug shipped directly to them. The vertical rectangles represent messaging presented on the app.

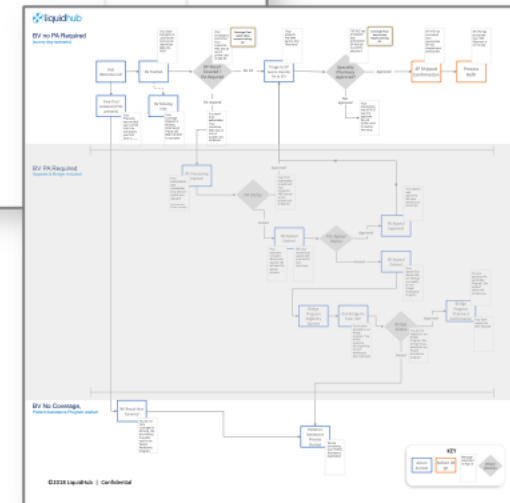
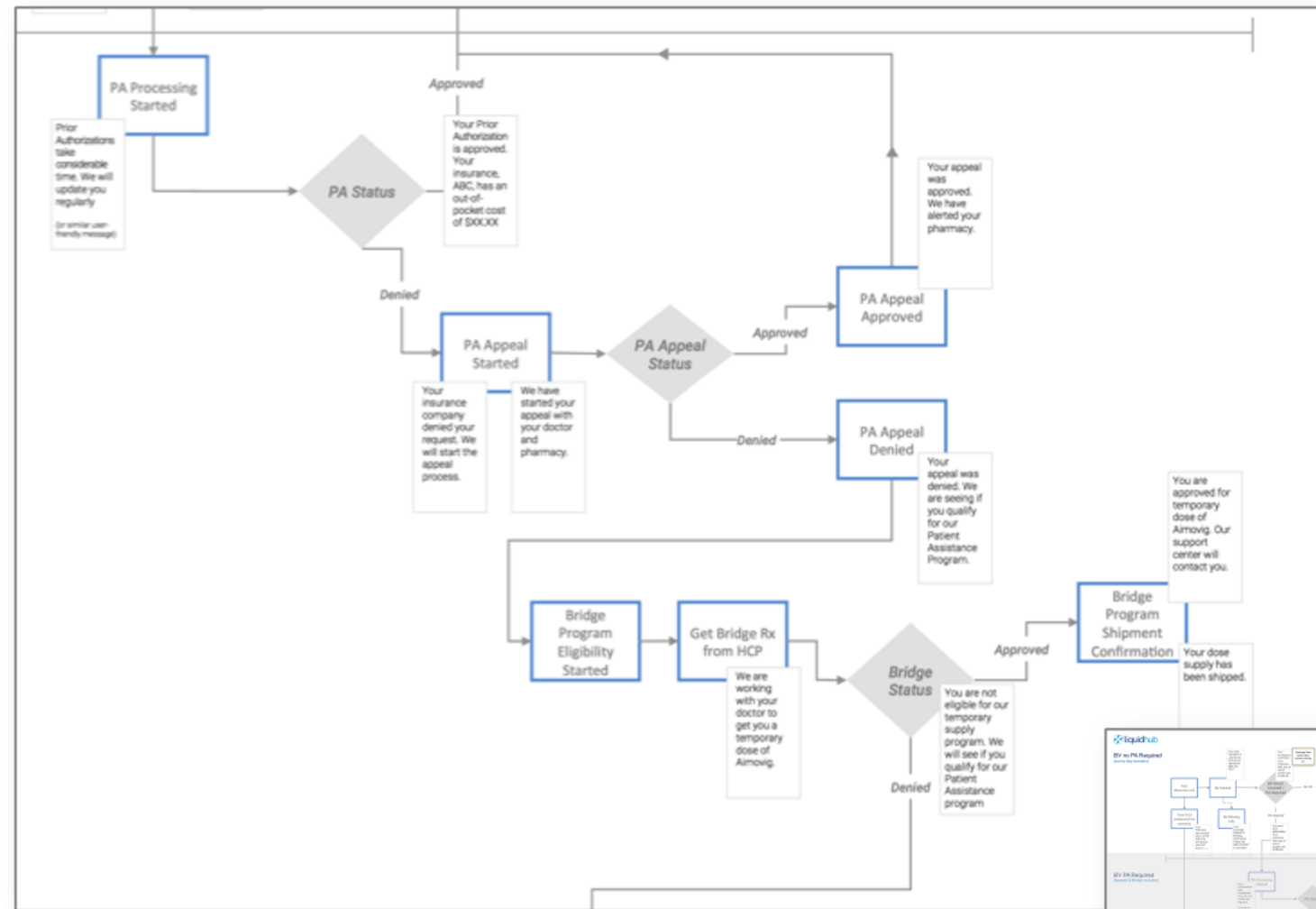
(SEE HIGHLIGHTED AREA IN BOX ON RIGHT)



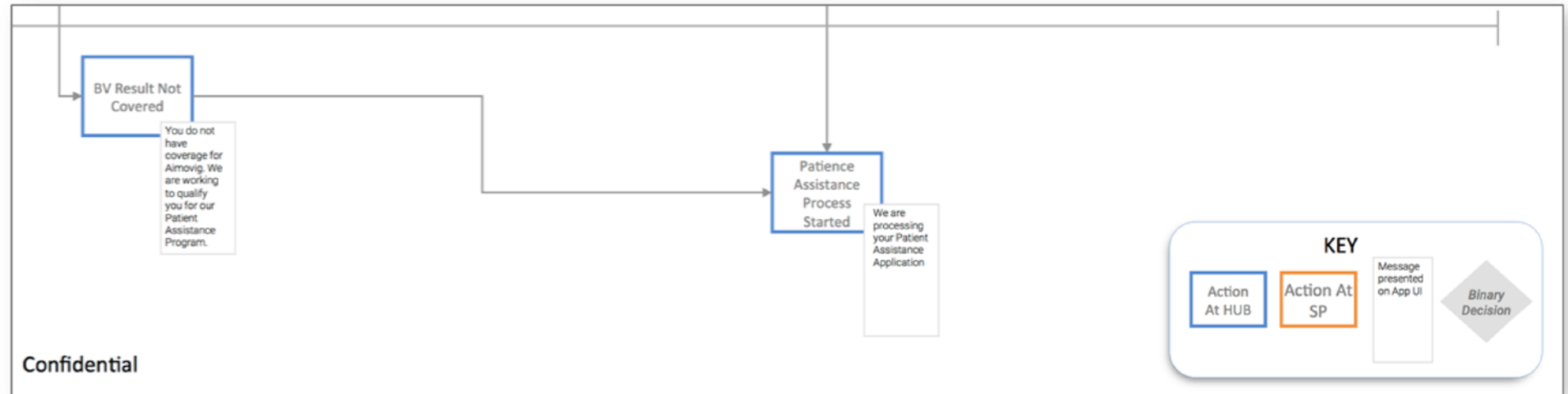
# Flow Details

In the 'sunny day' scenario, the user gets coverage from their insurer and is able to get the drug shipped directly to them. The vertical rectangles represent messaging presented on the app.

(SEE HIGHLIGHTED AREA IN BOX ON RIGHT)

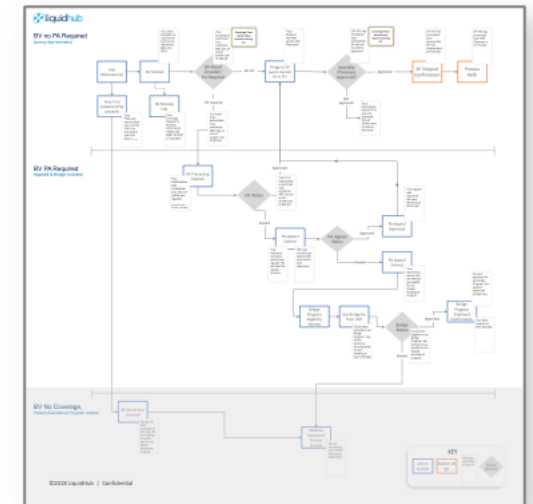


# Flow Details



If the patient cannot get coverage or the prior authorization cannot be obtained, they are given an option to go through a Patient Assistance Program.

(SEE HIGHLIGHTED AREA IN BOX ON RIGHT)

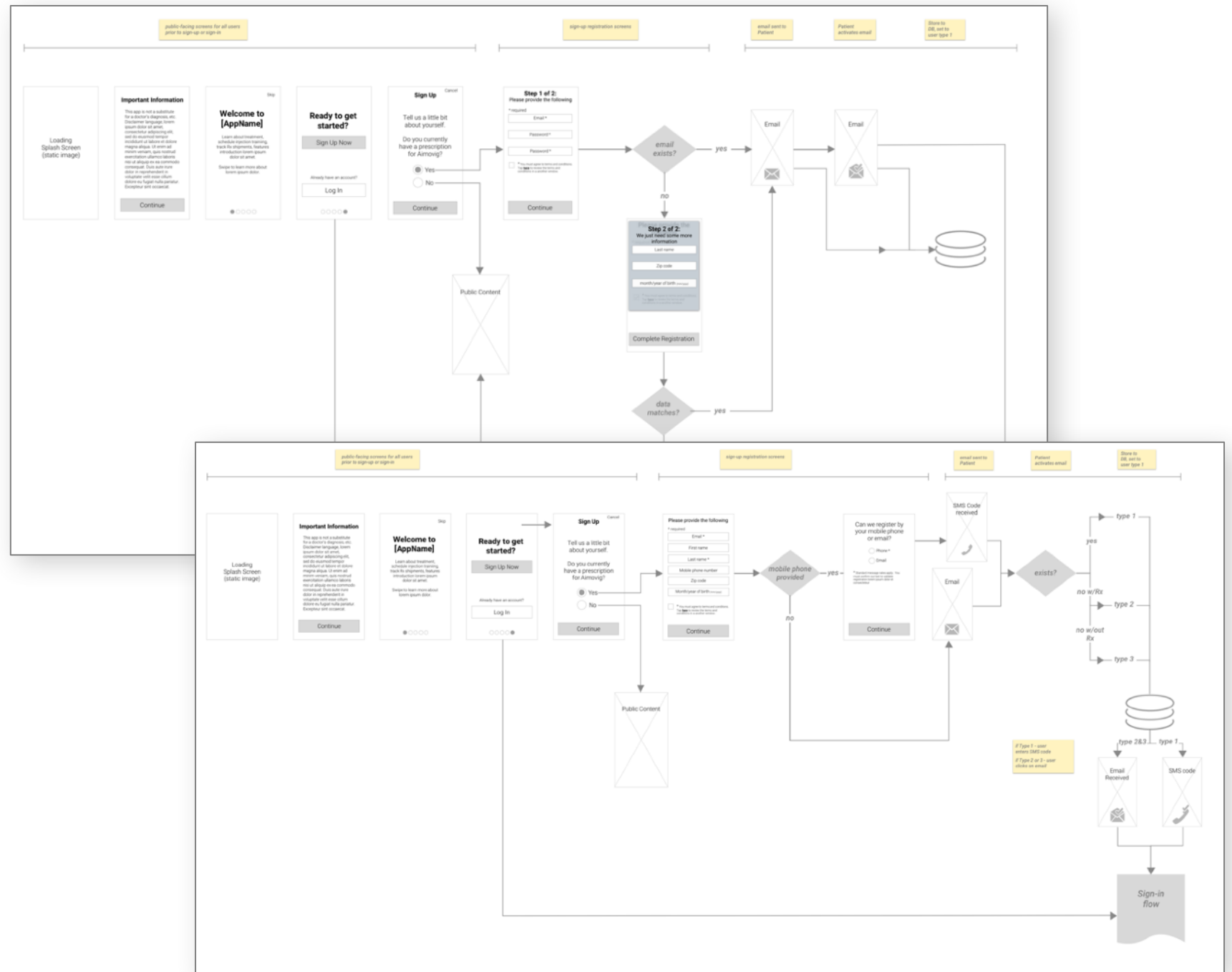




# User Journeys

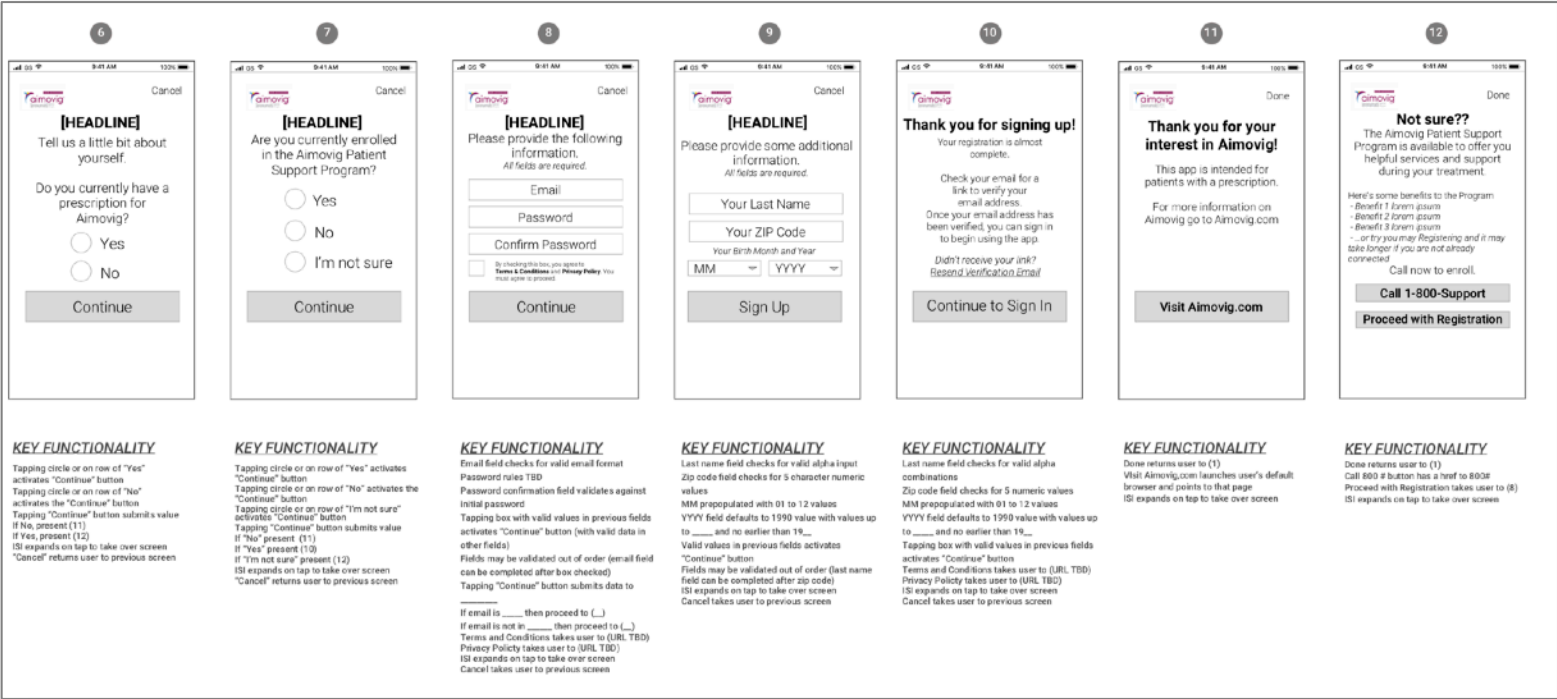
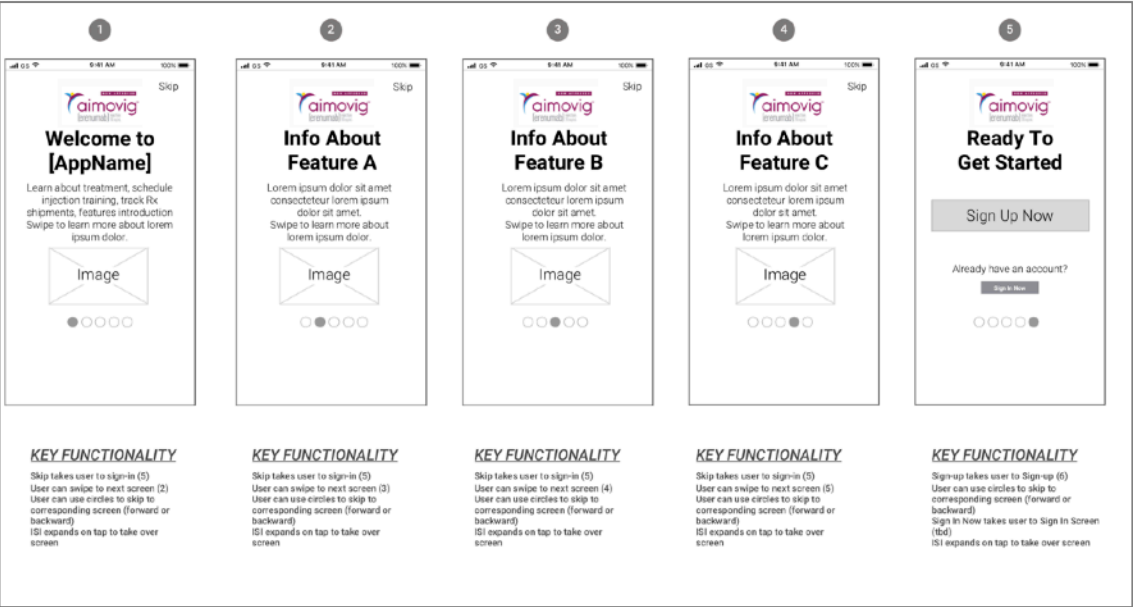
Critical to building the app, was how users would register.

Patients may download the app but not be prescribed or give over their cell phone. Not only did the app need to respond accordingly, the system supporting it had to track the steps and allow us to present useful messaging.



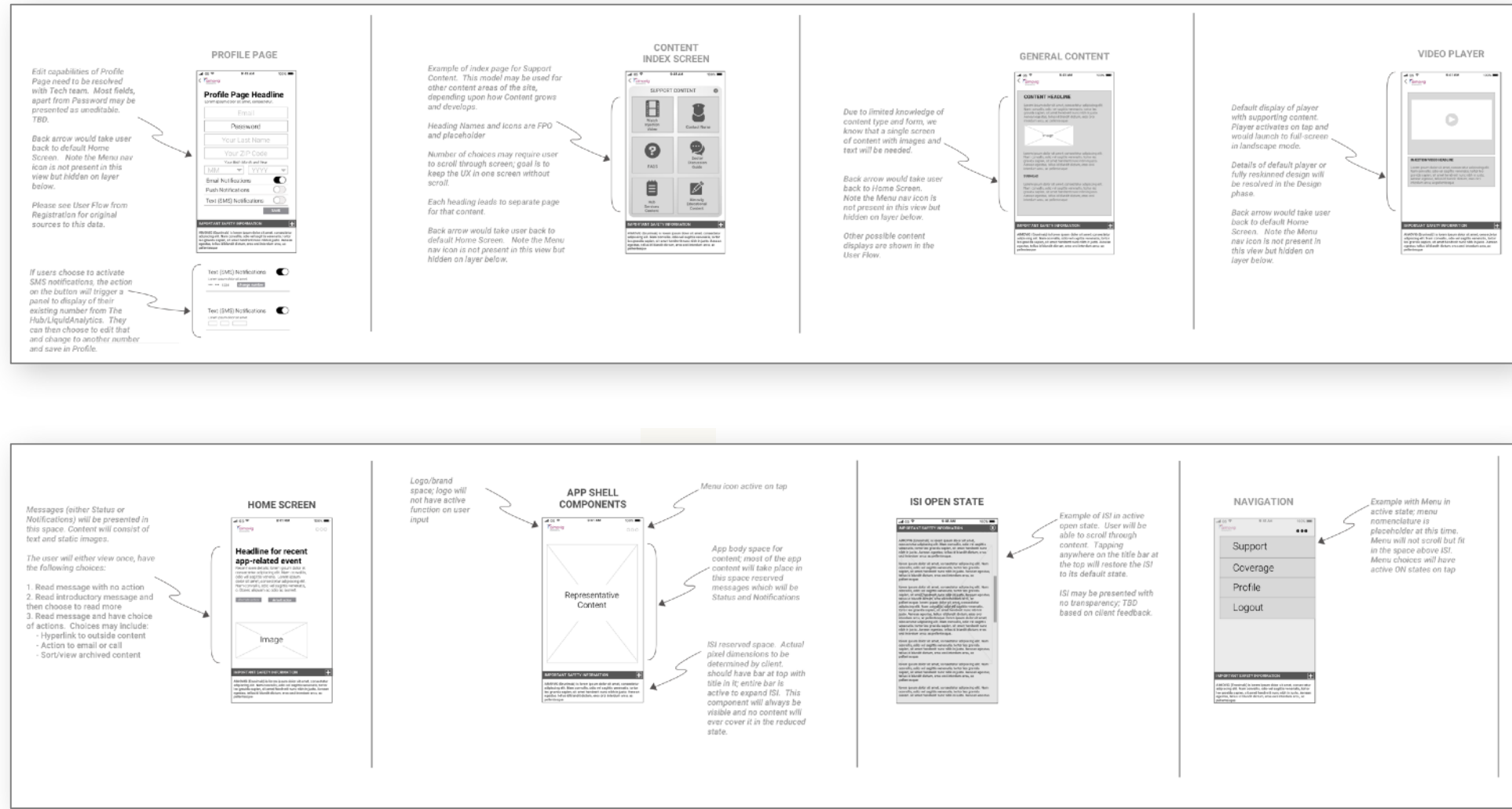
# Early Wireframes

Initial wireframes for the onboarding and registration process. Users would later authenticate through Touch or Face ID.



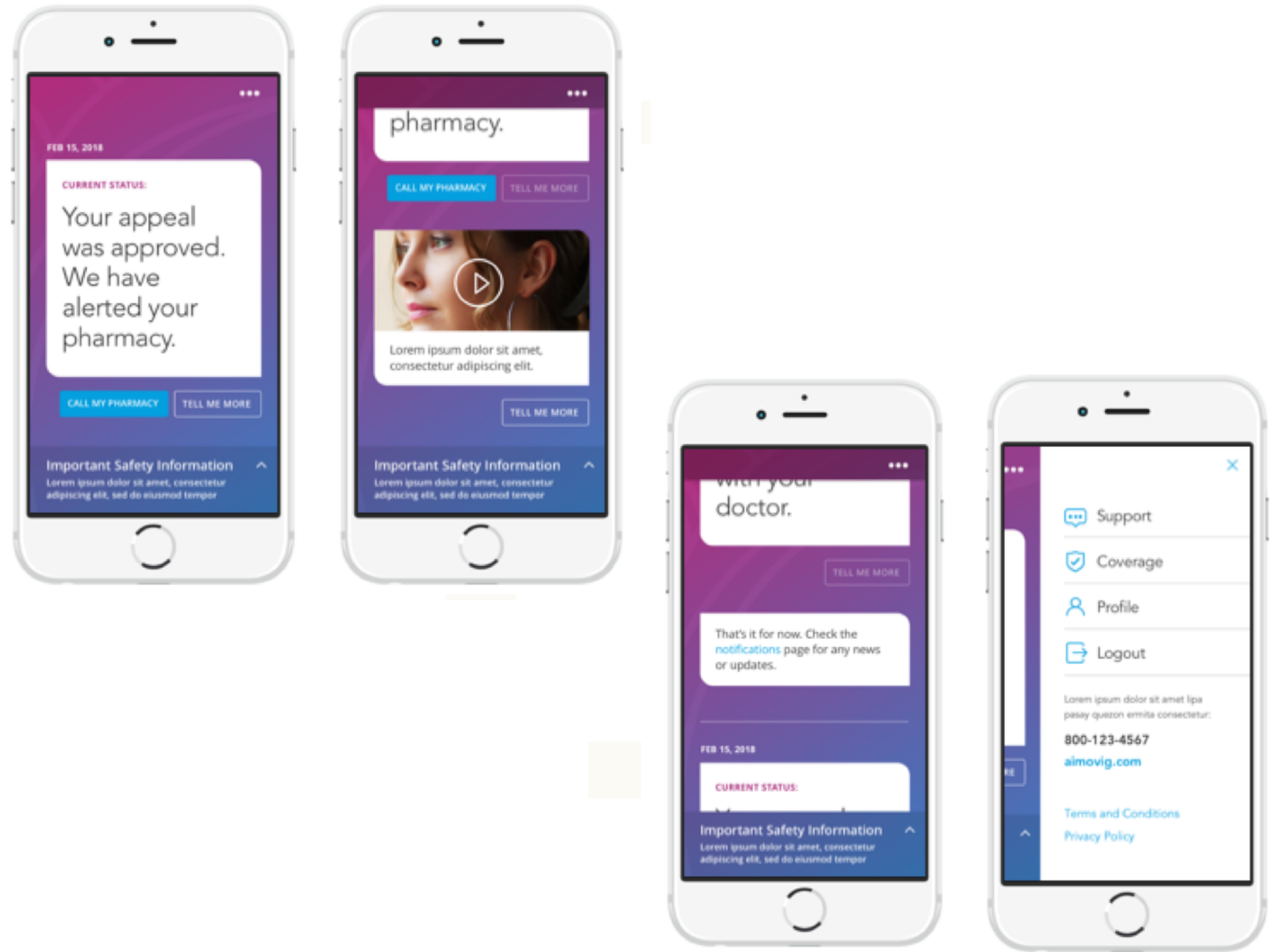
# App Shell

Designing the app shell and specifying the different screen types and functionalities helped frame the creative as well as development effort.



# Visual Designs

Following approval of the wireframes and app shell, here's example of a visual design concepts presented.



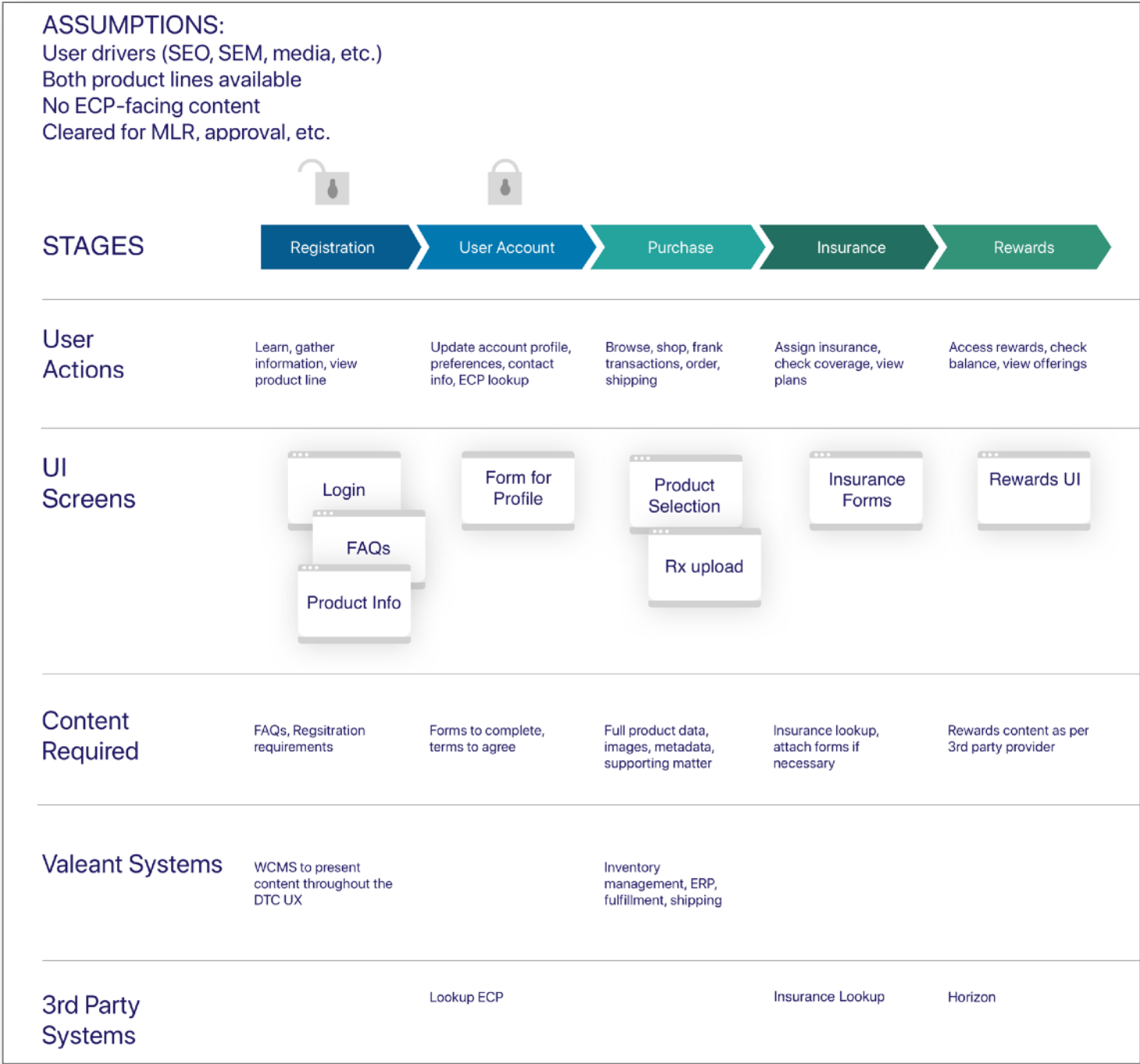
# Bausch & Lomb / Photon

- Description:** Bausch & Lomb wanted to rapidly deploy a DTC (direct-to-consumer) solution for contact lenses that would still preserve their business with eye care professionals and keep them competitive
- Situation:** Business disruptors like Hubble were stunning contact lens manufacturers with subscription-based fulfillment models that mirrored Blue Apron, Dollar Shave Club and many more. Additionally the marketplace was being upset by large brick and mortar establishments like Lenscrafters and Walmart.
- My Role:** Photon is an offshore developer that needed solid UX to support their extensive build capabilities. Not being as savvy about UX as some companies, I had to navigate between the demands within Photon to produce a high-fidelity wireframe, while still keeping to the best practices of understanding users and defining requirements before design.
- Solutions:** Project roadmap, user journeys, business model, sitemap, low and high-fidelity wireframes

# Project Roadmap

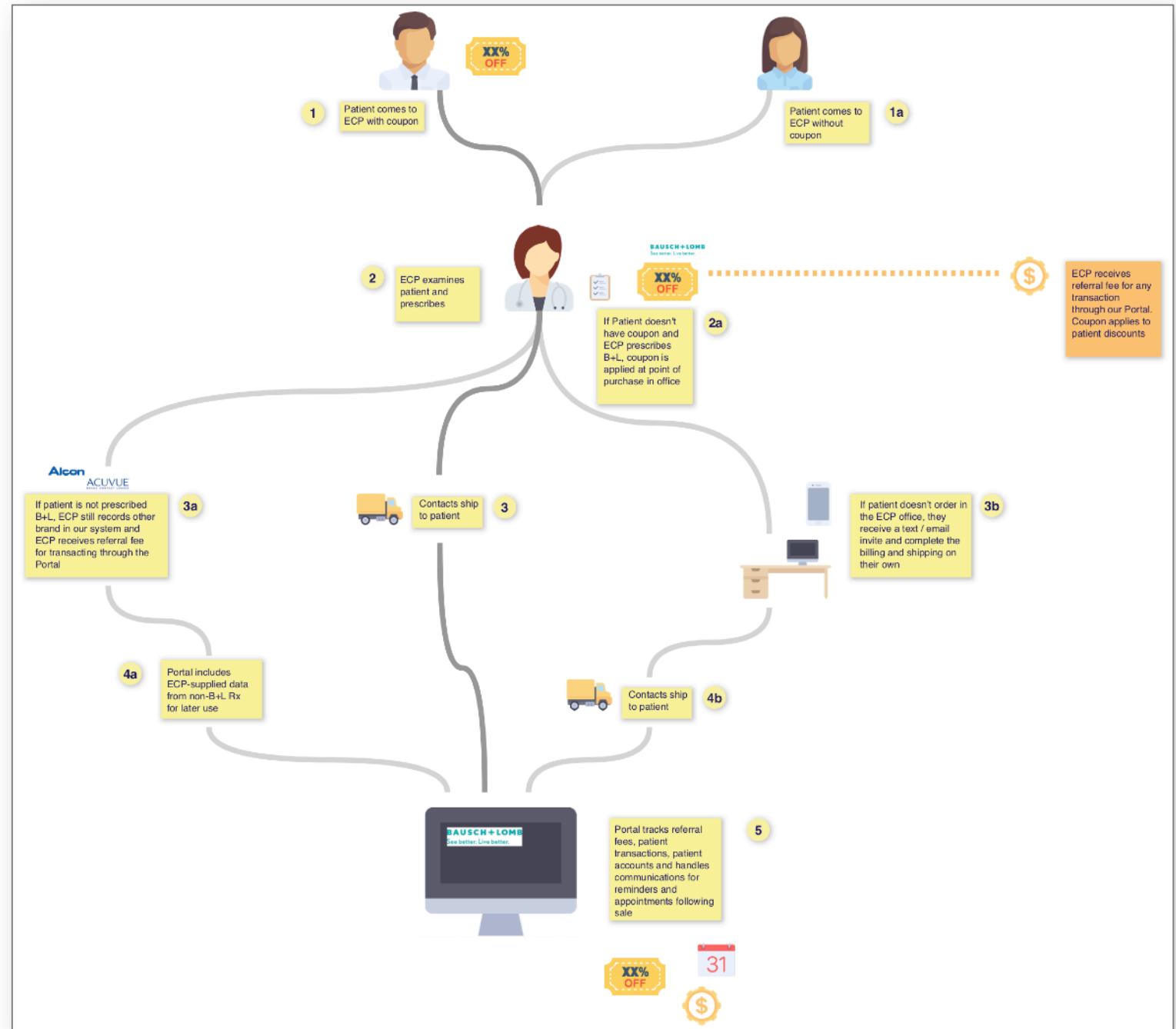
This early-stage hybrid diagram shows in a rough way what systems are required, what content is needed and what a user journey might look like.

This was done in the first few days of the project to get a sense of where we were headed.



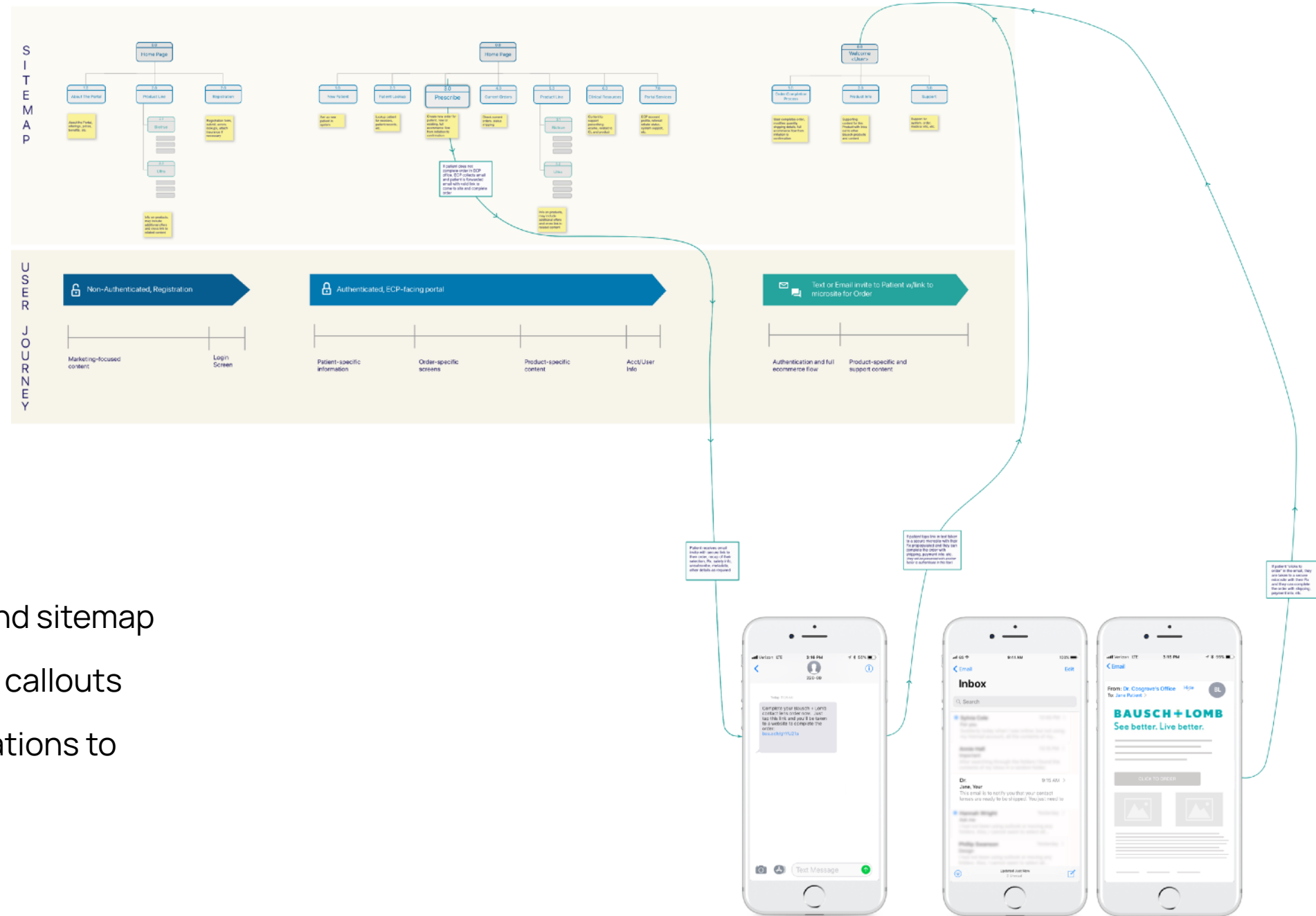
# Referral Model

The business needed a high-level diagram to reflect the "referral model" this entire system was built upon. Highly regulated communications between doctors and patients needed to be vetted by MLR (Medical, Legal and Regulatory) to determine the product's viability.





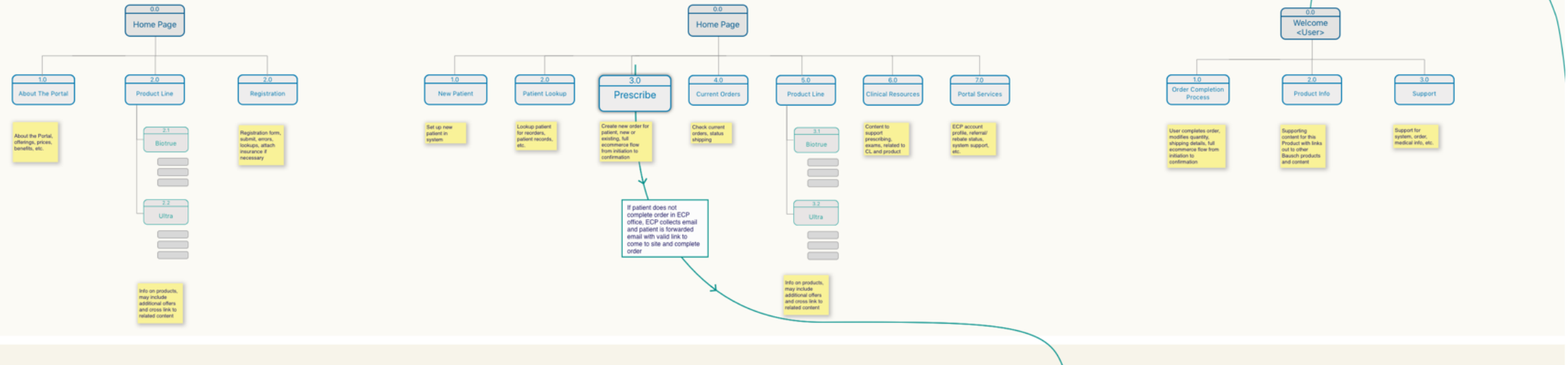
# Full User Journey



The entire user journey and sitemap with mobile mockups and callouts to explain the communications to patients and their paths.

# Sitemap

## S I T E M A P



The sitemap showed the 3 different user profiles:  
Introduction to ECP (eye care professionals),  
authenticated ECPs, authenticated patients

# User Journey Detail

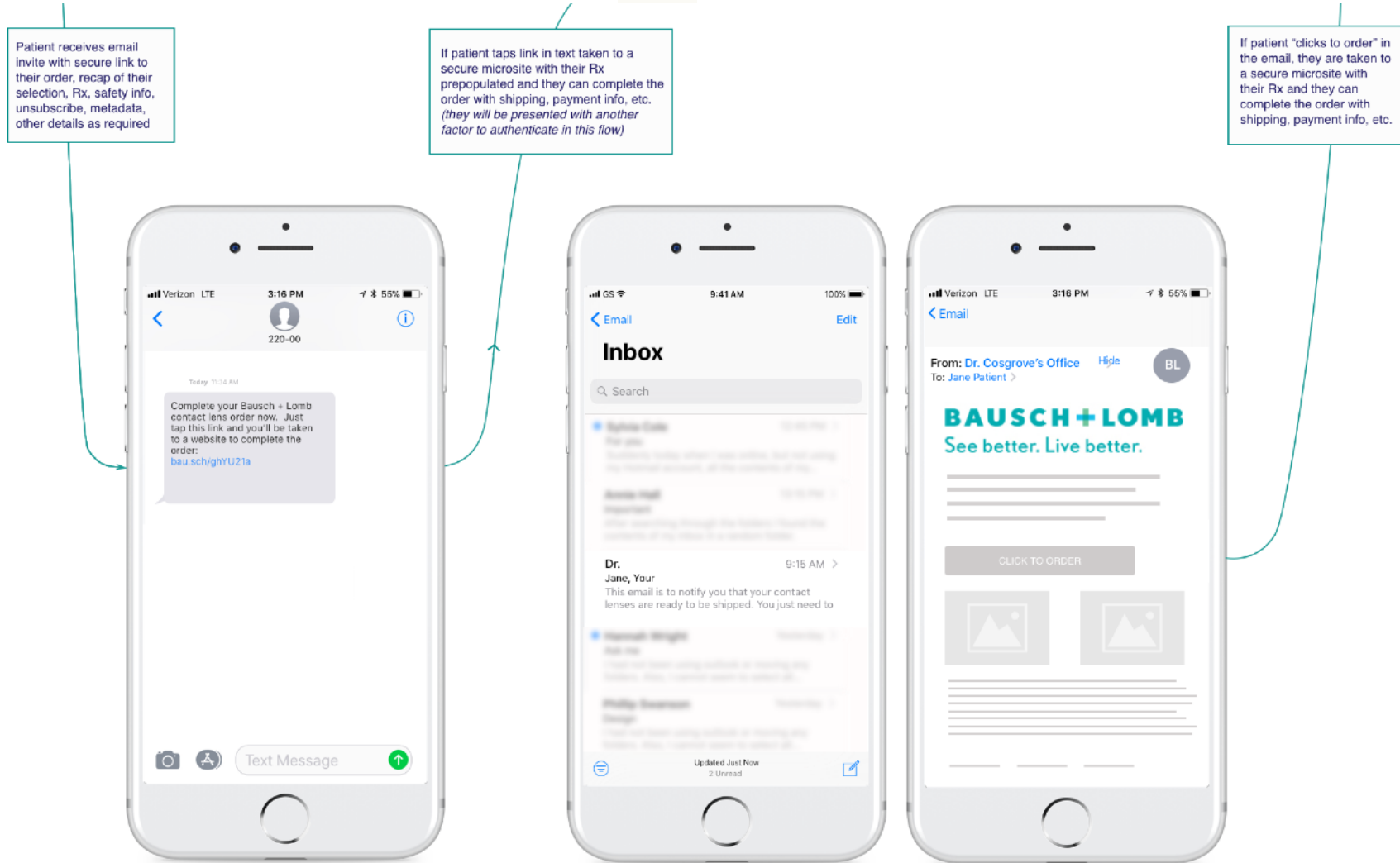
USER JOURNEY



The User Journey showed the sequence of operations as different user's engaged with the system.

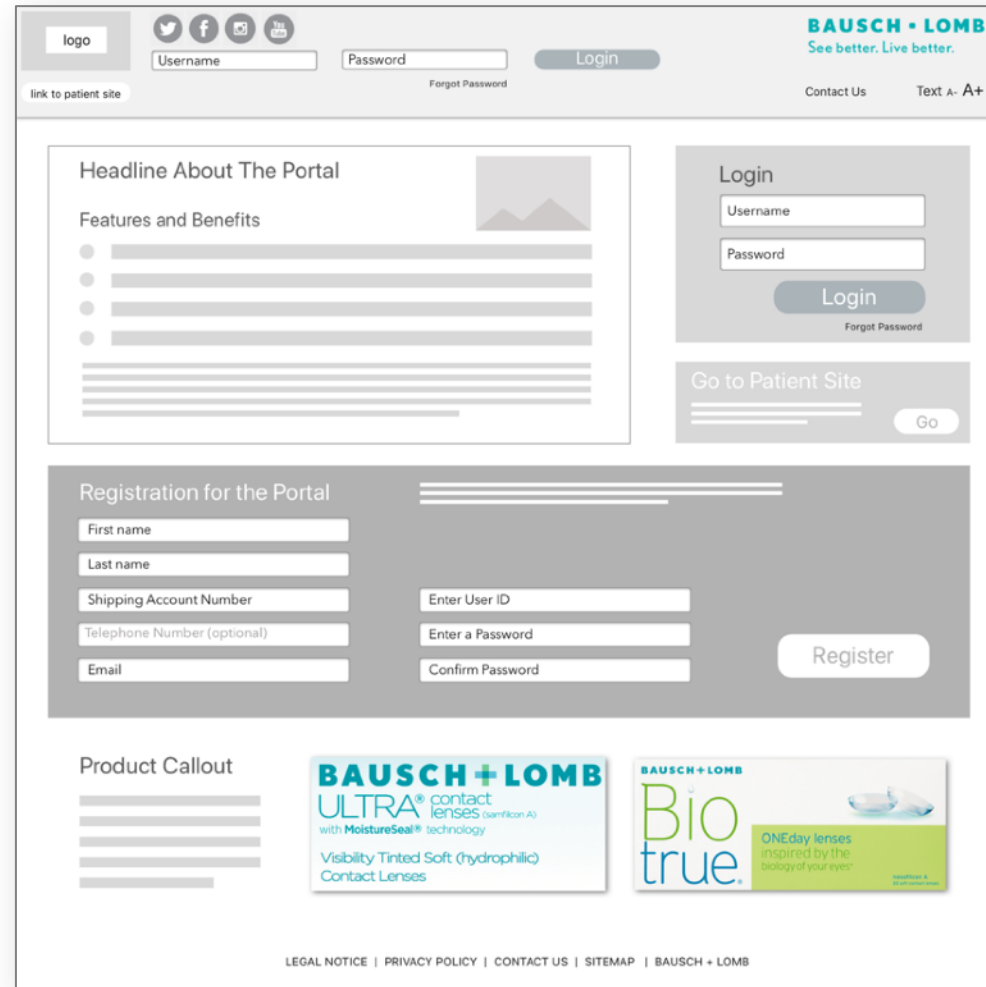
# Mobile mockup

I put together some rough illustration of how patients would be notified by text or email which drives them to a personalized website with their prescription and full ordering capabilities.



# Low-Fidelity Wireframes

I created low-fidelity wireframes to capture the ECP's side of the experience from non-authenticated to authenticated. While this would be a good start, there was a drive to go to higher fidelity.

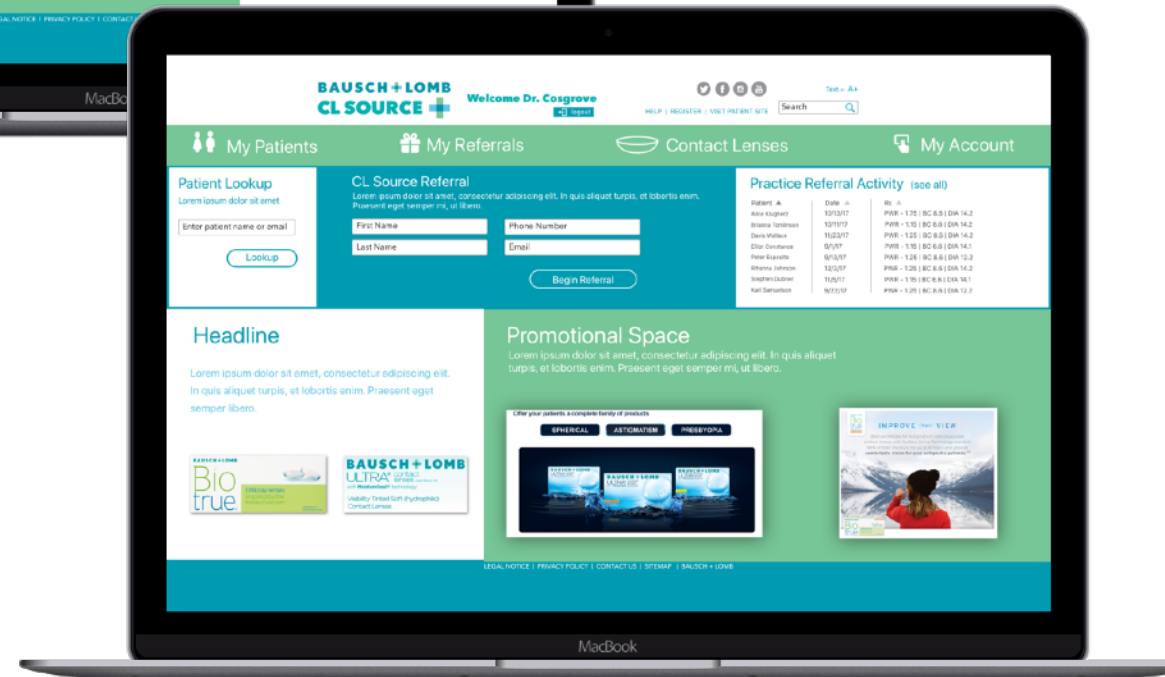
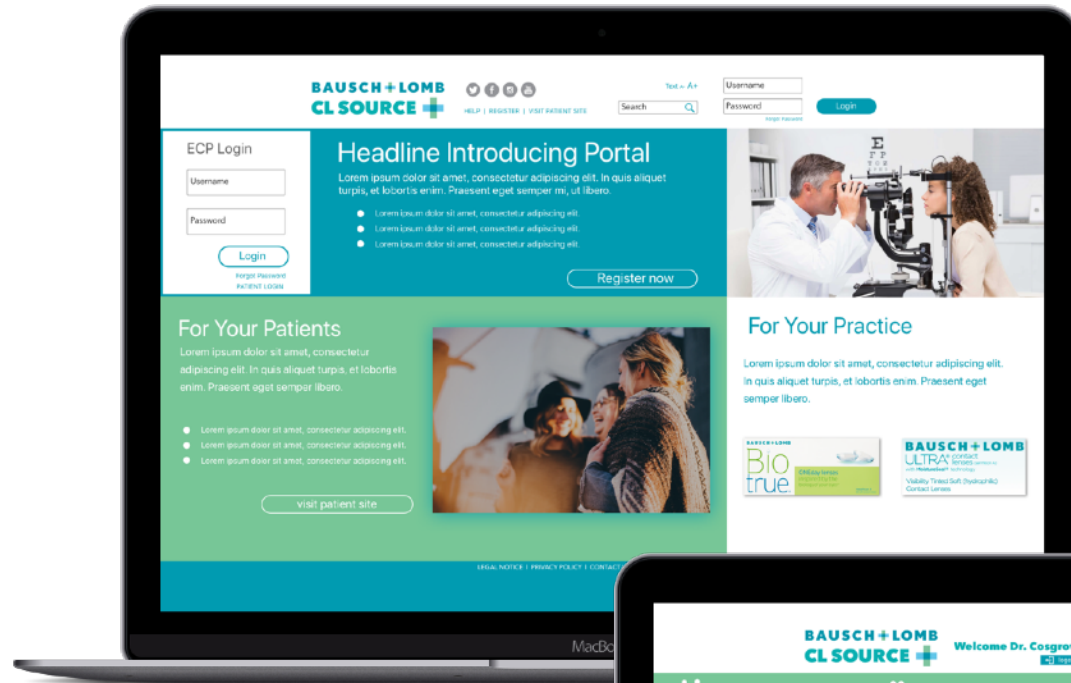


# High-Fidelity Wireframes non-authenticated home

The client was seeking high-fidelity wireframes to further sell the concept to management.

Ideally, this isn't attempted until there's a creative execution and a living brand to build upon.

But ... sometimes I have to what is necessary. Shown is HCP-home page and authenticated home page.



# Allergan Liletta Access Connect / Centron

- Description:** Liletta was a new IUD on the market and distinguished itself through promoting access across a number of channels, One of these was enabling doctors and their staff to prescribe and manage patient's benefits through a web application: Access Connect
- Situation:** Centron had done a lot of branding and marketing collateral for Liletta but Access Connect was designed by another shop and missed the mark. Analyzing the faults of their design and proposing a new solution we won the business to redesign that application which led to winning more business to redesign a similar portal for the eye care franchise and Botox.
- My Role:** As the beginning of a two-year engagement with Centron and Allergan (as a contractor with Centron) my role began as UX Lead but quickly evolved to cover technical project management, creative direction and business development.
- Solutions:** Business Requirements Documentation, User flows, Sitemaps, Wireframes, Prototypes, Content Matrix, Functional Specifications



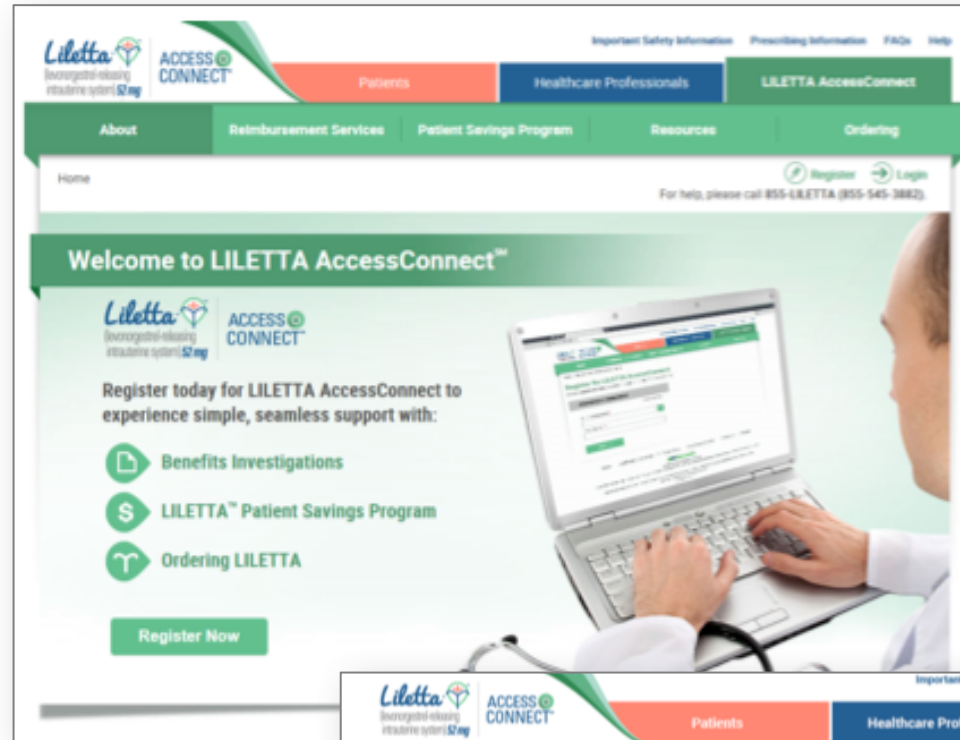
# Problems with existing site

Global tab navigation took up a lot of space at the top of the page and included links to the Patient site, with as many as 3 layers of tabs to get to content

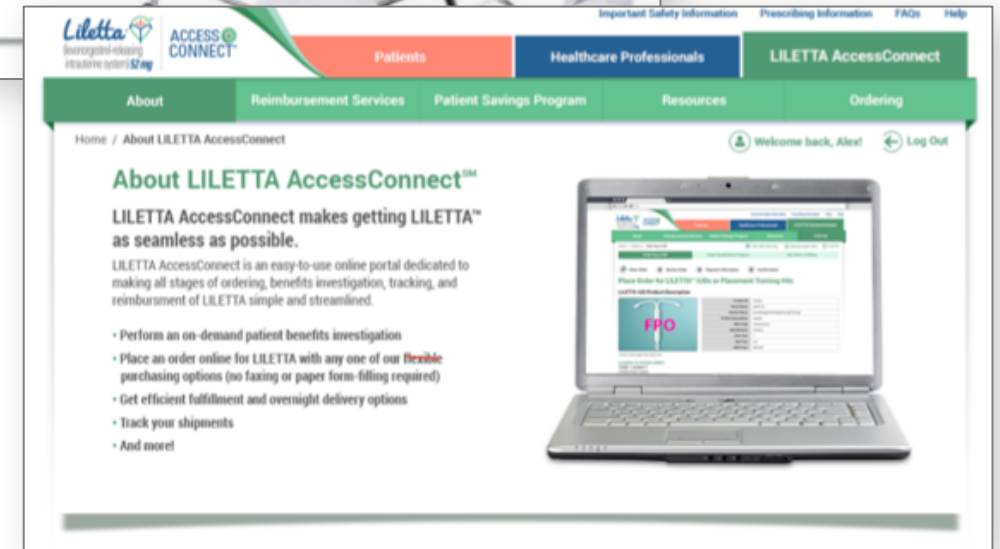


# Problems with existing site

The non-logged-in users were presented with general content which didn't fully explain the features and benefits of this application.



Logged-in users were greeted with little content to act upon, instead getting an “about” page with no real application-specific call to action.



# Analysis & Solutions

I put together an analysis that looked forward and didn't diminish their initial efforts.

## *Home Screen*

- ✓Present actionable information for logged-in users
- ✓Provide navigation to the sections avoiding another level of nested horizontal tabs
- ✓QA properly so that authenticated users do not see general splash page content

## *Patient Savings and Resources*

- ✓These 2 sections are distinct from Reimbursement and Ordering in that they are not transactional; they should be presented differently

## *Reimbursement*

- ✓Better understand the capabilities of the system to design a better interface (the test account doesn't give us full access to all possible displays)
- ✓Improve form interactions with pre-populated data, predictive typing, field validation
- ✓Consider linking Patient Information with any EHR or backend system the doctor's office may already have

## *Design*

- ✓Create consistency between HCP site and Access Connect
- ✓Ensure design elements are strategically implemented to enhance user experience

## *Expanding the relationship*

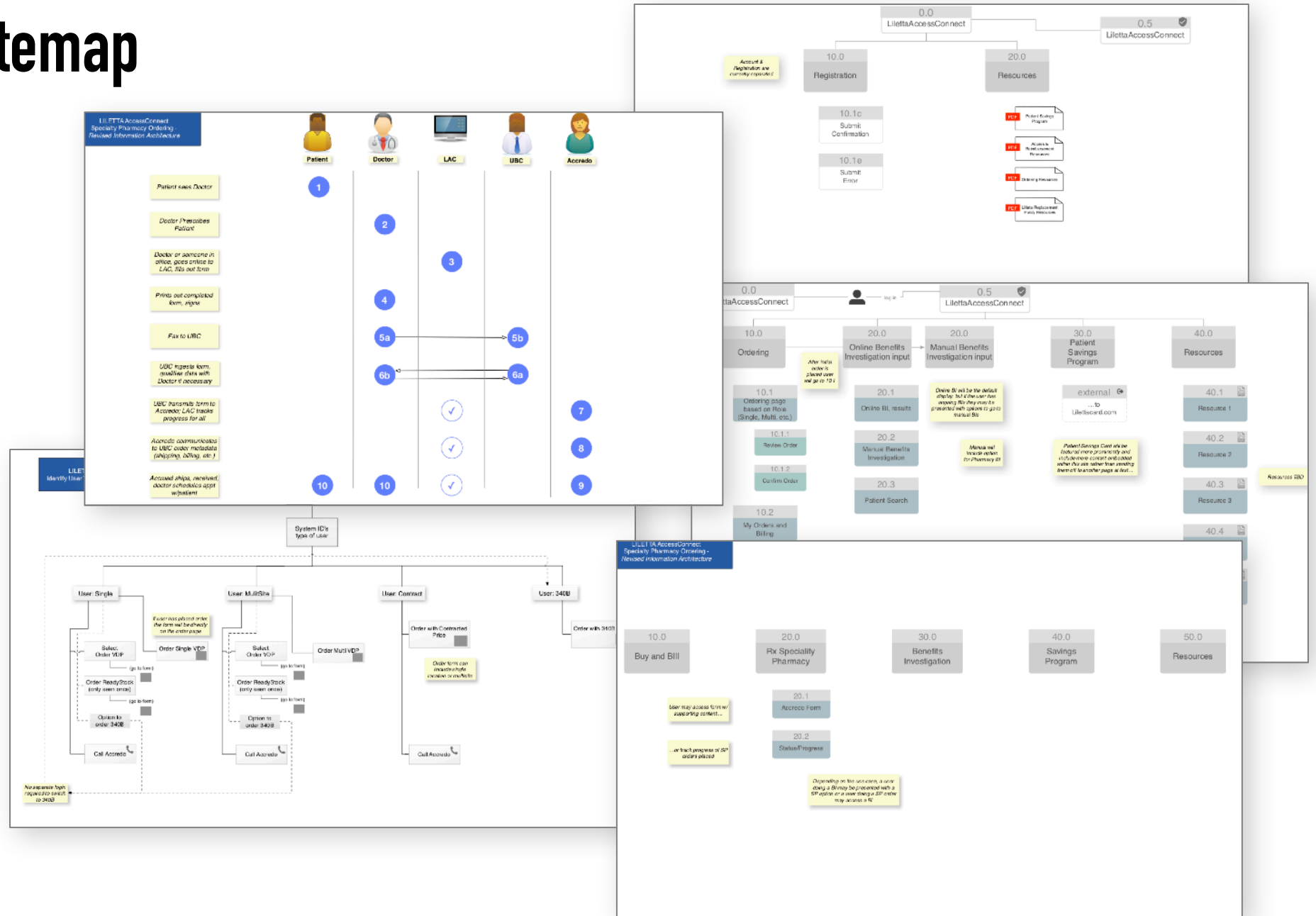
- ✓Create a dashboard that tracks orders and key information for users
- ✓Reinforcing the relationship with communication within the site
- ✓Generate reminders when users haven't placed an order, haven't logged in in a certain amount of time, or are close to the discount number to increase purchasing habits and interaction
- ✓Allow users to choose preference in communication- text, call, email

## *Ordering*

- ✓Need to understand how the Ready Stock Program works (currently unavailable)
- ✓Lead user more directly to Order through VDP with sufficient explanation closer to the order form itself
- ✓Change process icons to clearly show the user where they are in the sequence of ordering, what steps are completed and what steps are outstanding
- ✓Supply product information in a way that does not clutter the ordering user experience

# User Flows and Sitemap

Using swimlane diagrams, user flows and sitemaps, we were able to restructure the content

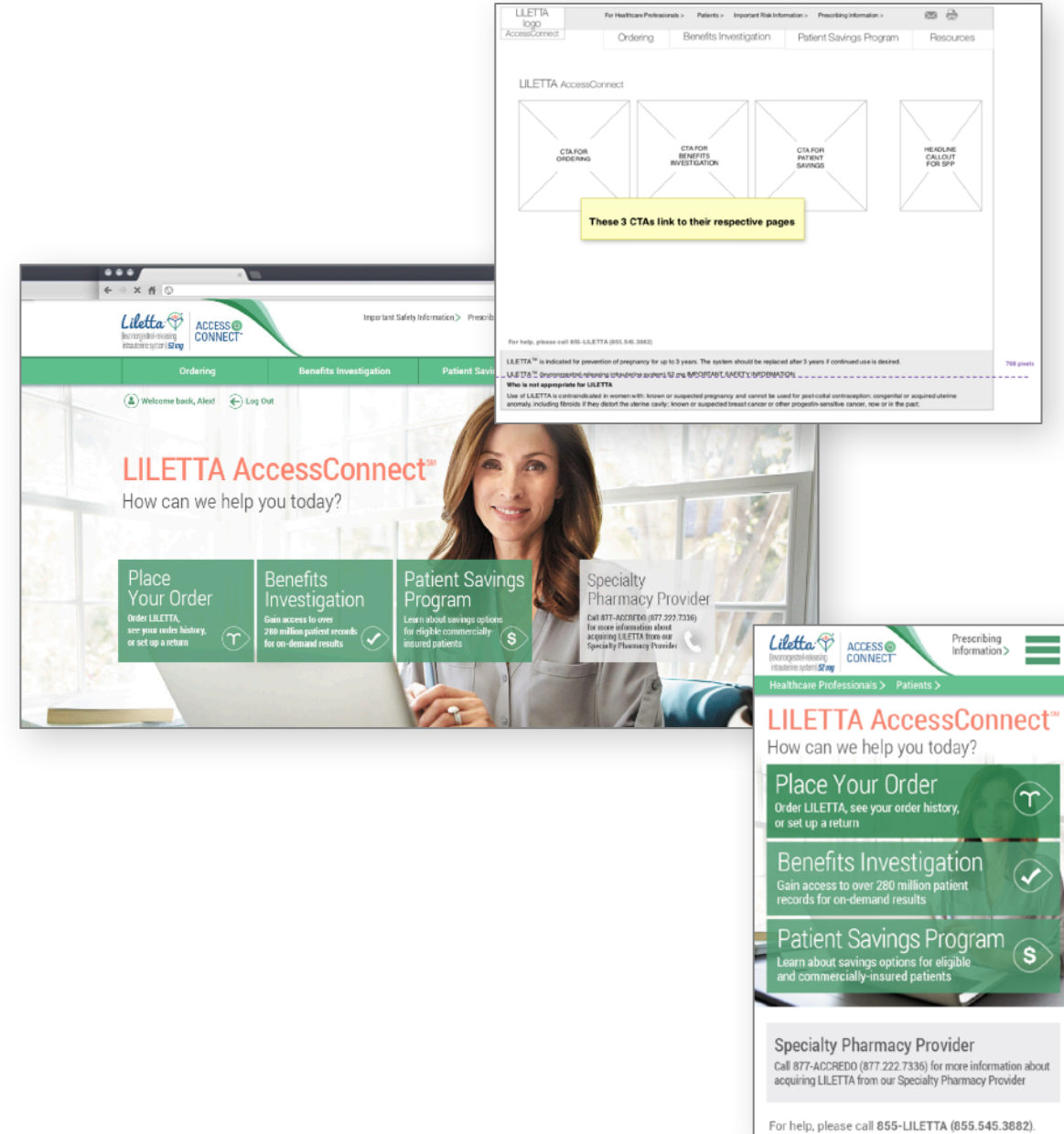
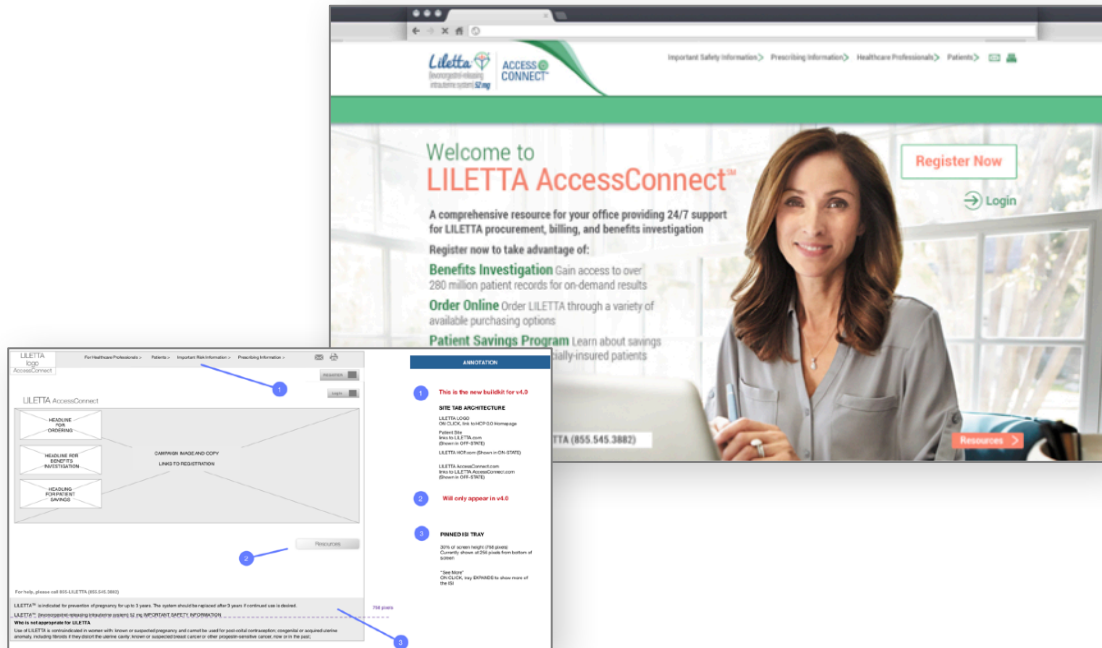


As Centron was only doing design and not development, wireframes needed functional specifications that developers could easily grasp, including complex ecommerce pages.



# Visual Design applied to Wireframes

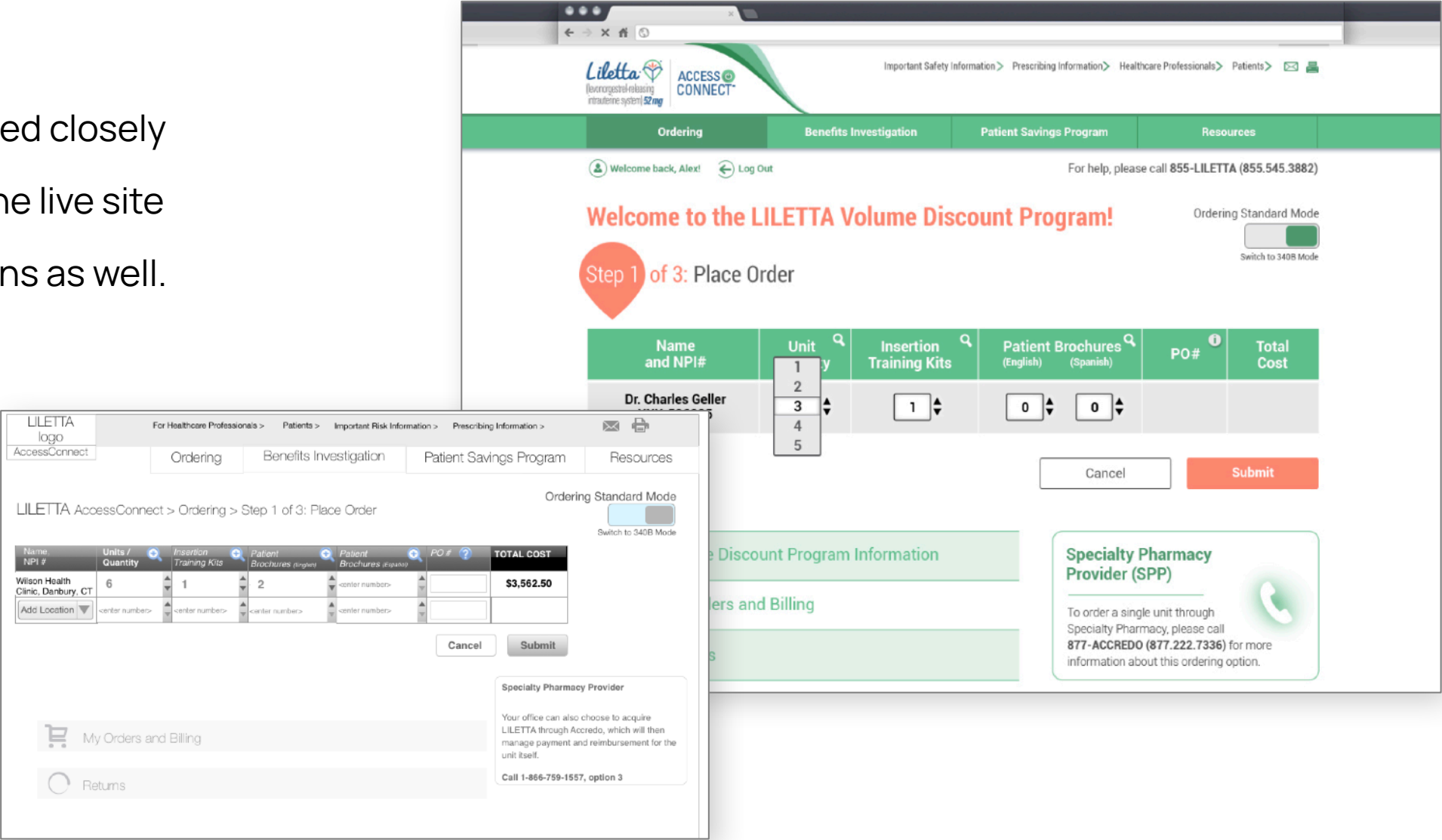
The Visual Design, hewed closely to the wireframes for the live site, for desktop and mobile, for non-authenticated and authenticated users.





# Visual Design applied to Wireframes

The Visual Design, hewed closely to the wireframes for the live site with ecommerce screens as well.





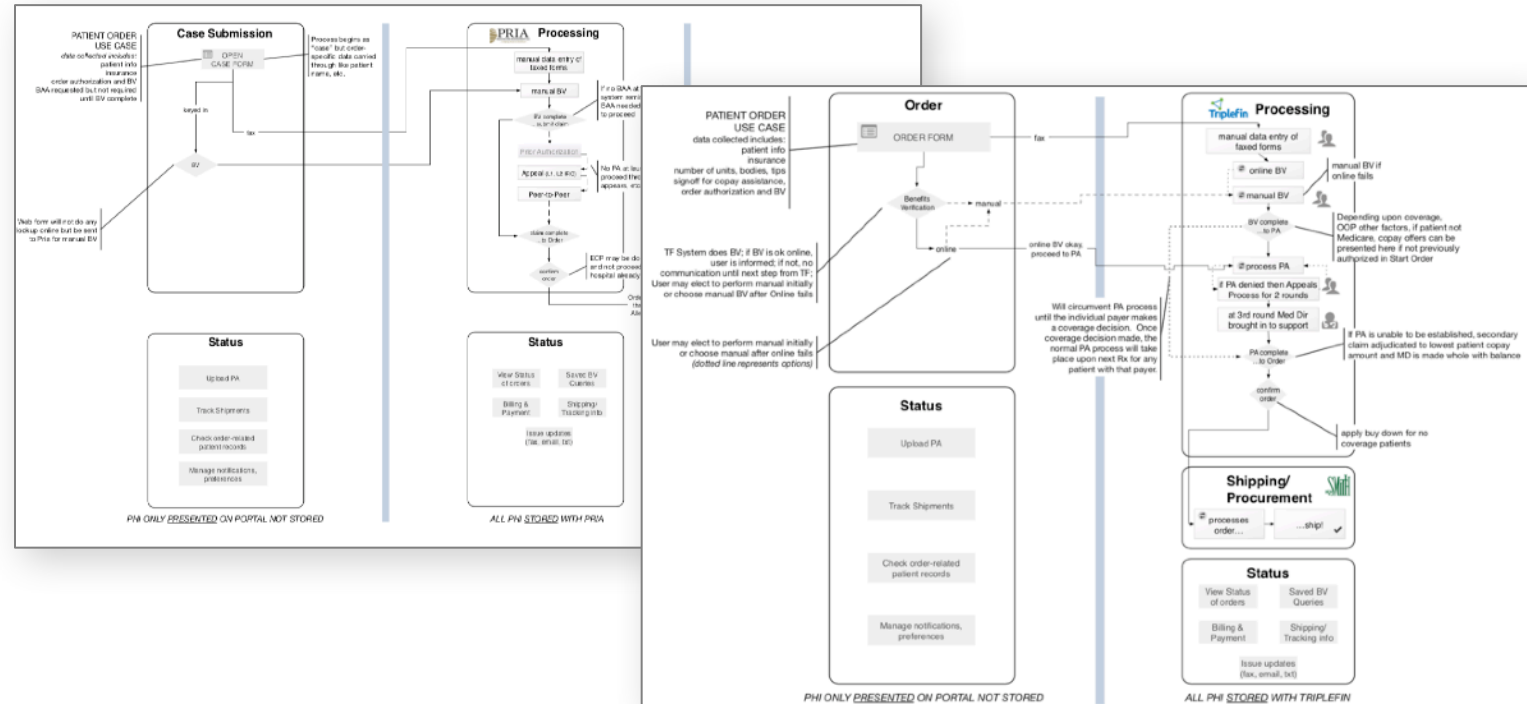
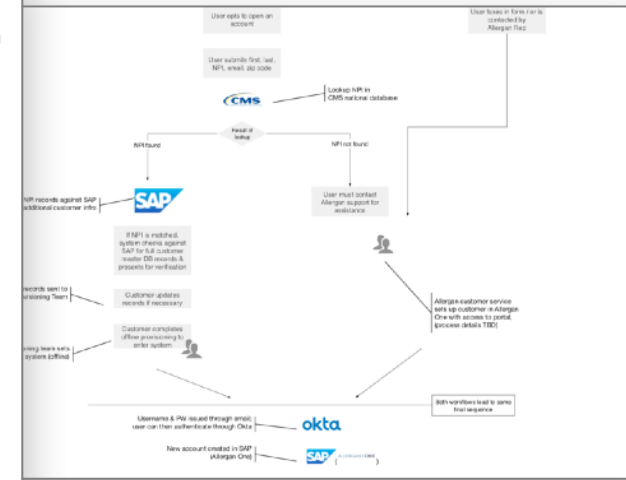
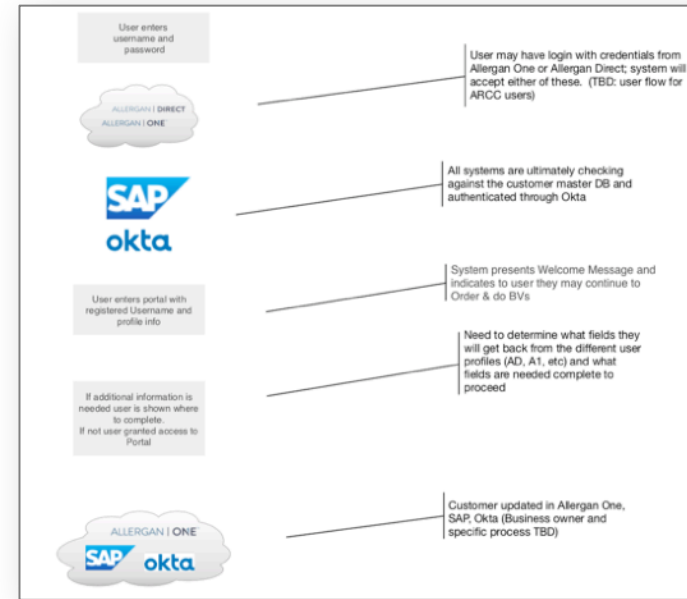
# Allergan EyeCue / Centron – FOLLOW-ON ENGAGEMENT

- Description:** As a result of the success with the AccessConnect project, Allergan tasked Centron to design the front-end UX for an even more robust application with similar capabilities. Their entire eyecare franchise of treatments and medications would be enabled in this portal
- Situation:** In this case, the treatments were a variety of delivery. Some were medical devices, some traditional drug delivery, some complex surgical treatments. Each one had its own unique set of requirements. Additionally, this needed to integrate more fully with the Allergan backend (SAP) and authentication (Okta) in addition to
- My Role:** I was responsible for leading the team not only with UX but also integrating with the various vendors and internal Allergan IT through workshops. Centron had limited technical knowledge and a small design and UX capability that I helped grow to meet the needs of the engagement.
- Solutions:** Business Requirements Documentation, Workshops User flows, Dataflow diagrams Sitemaps, Wireframes, Prototypes, Functional Specifications

# User Flows

Complexities of signup and login needed to be fully mapped out. Allergan's enterprise-authentication vendor Okta already had existing subscribers. SAP also handled an ERP function.

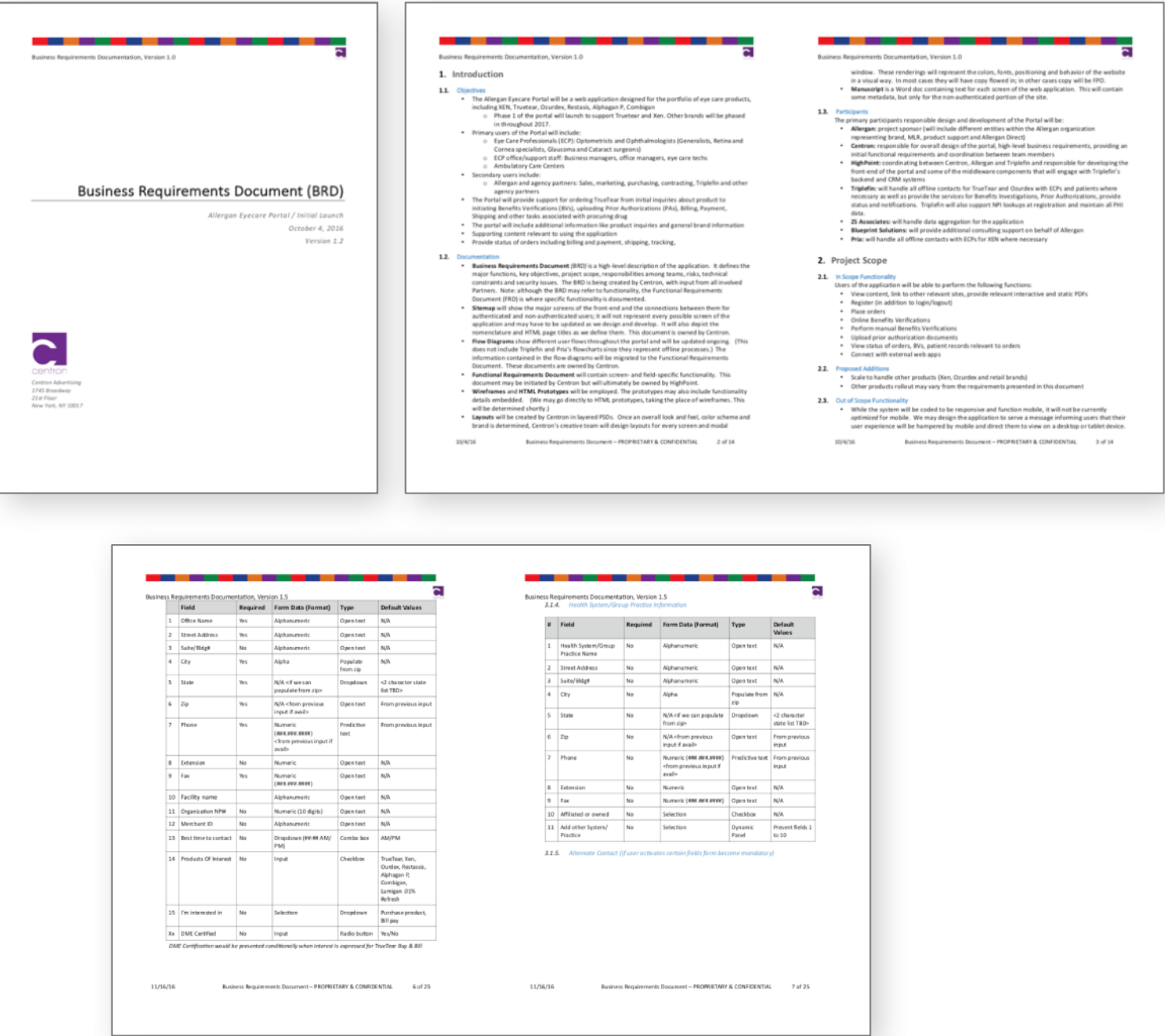
We also needed to document the flow of data through different vendors from initial inquiry for patient benefits to prescribing, ordering and shipping



# Business Requirements Document

The BRD became the working document reflecting all associated business rules, user flows, product definitions and other relevant requirements.

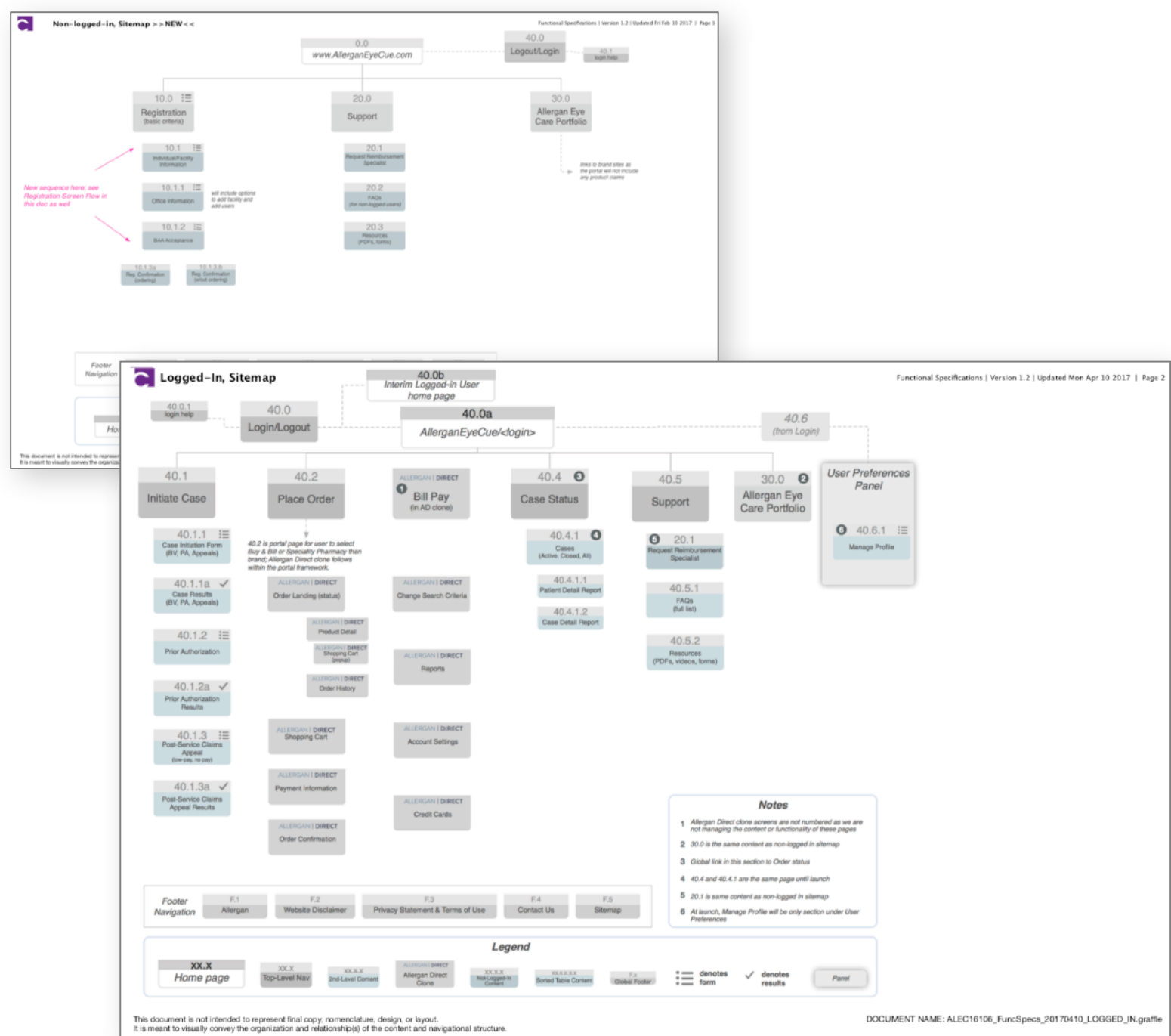
The different teams and vendors utilized the BRD to frame the work breakdown and scope out resourcing as well as design infrastructure and systems architecture.



# Sitemaps

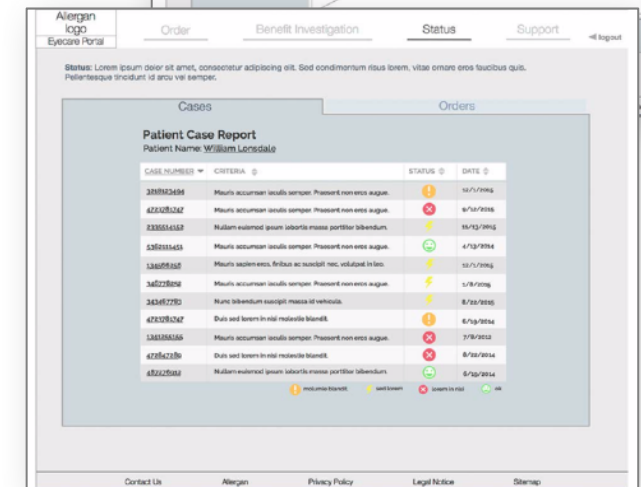
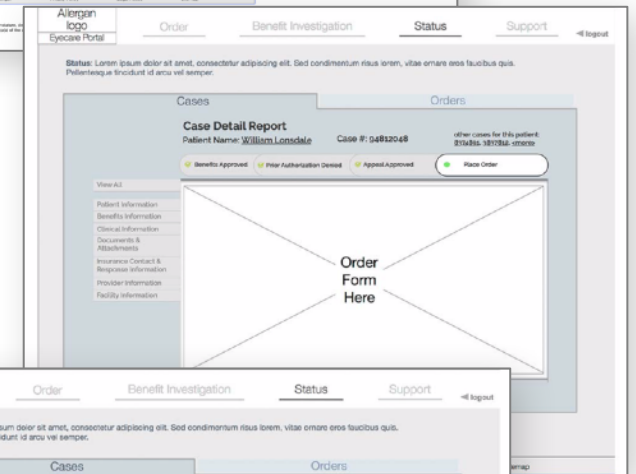
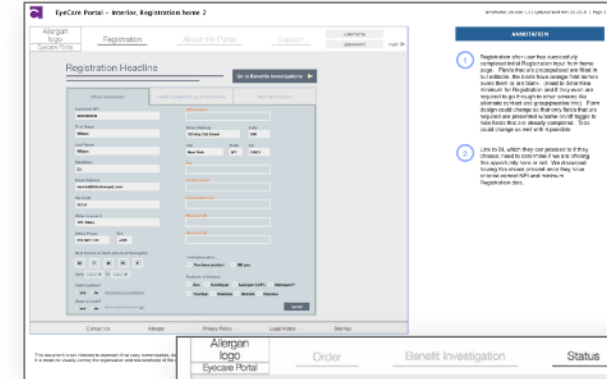
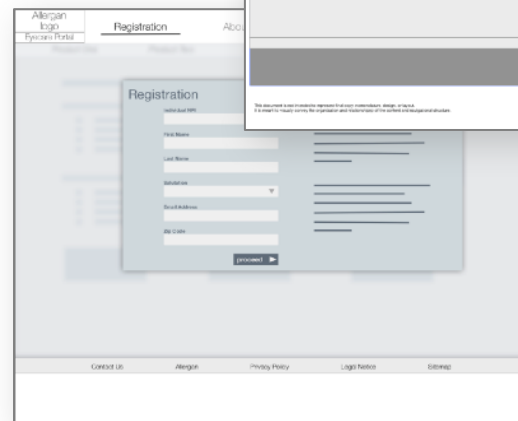
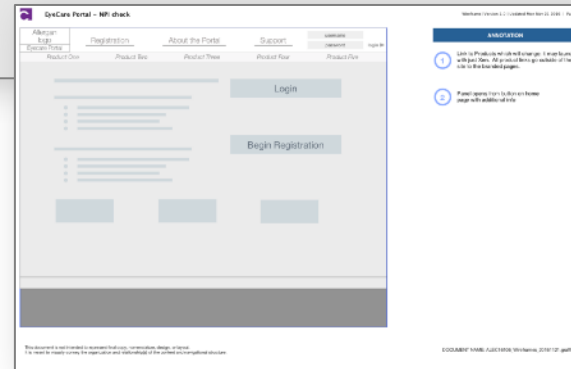
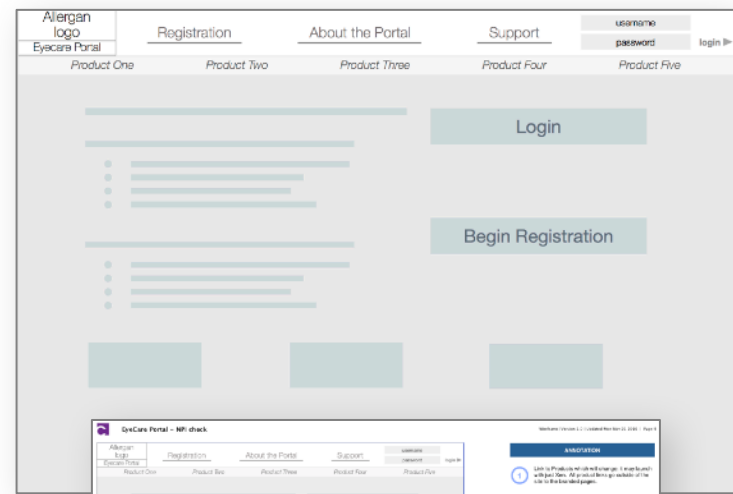
Non-logged-in users (top) and Logged-in users (bottom) had completely different capabilities and functions in the application.

Though mostly representing front-end, the logged-in user sitemap also followed the user flow.



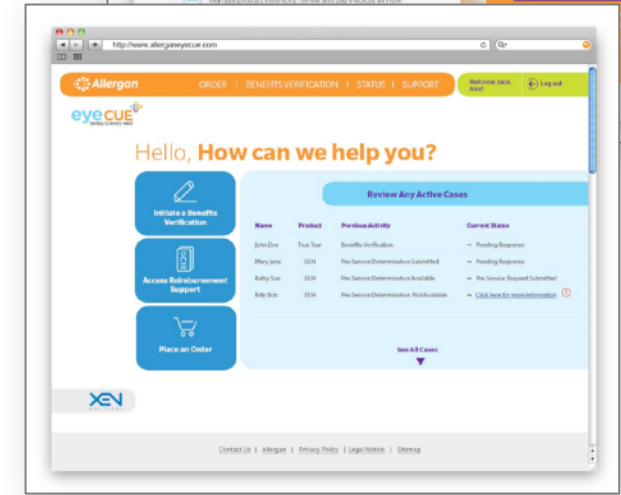
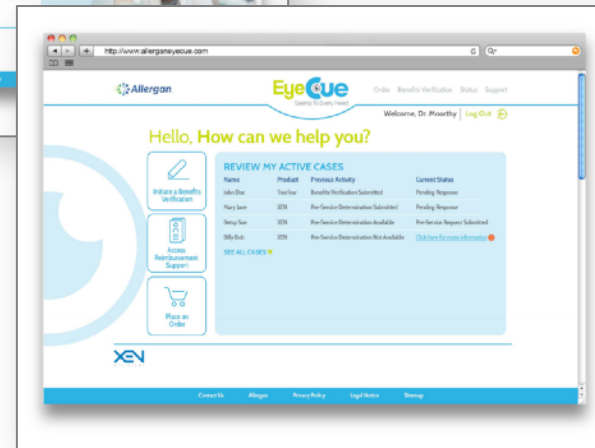
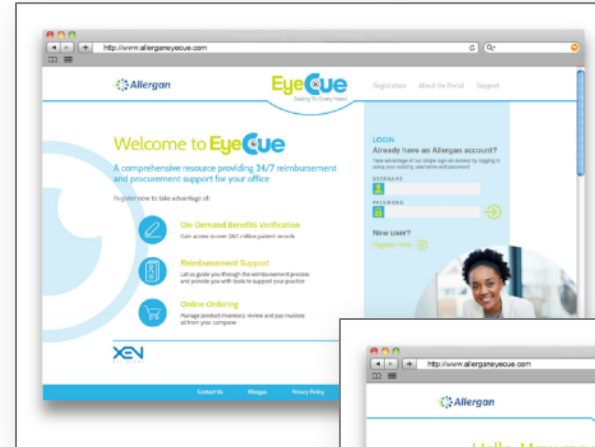
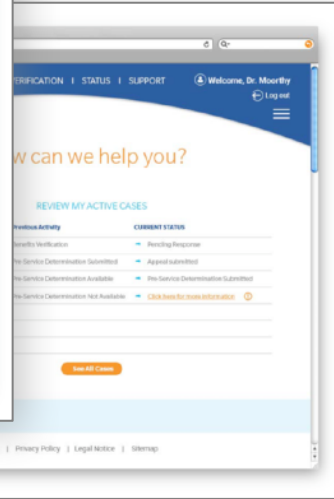
# Wireframes

Wireframes were rendered in a Lean UX fashion without representing every conceivable screen, just key variations for non-logged-in and logged-in users as well as forms and data-intensive displays.



# Creative Executions

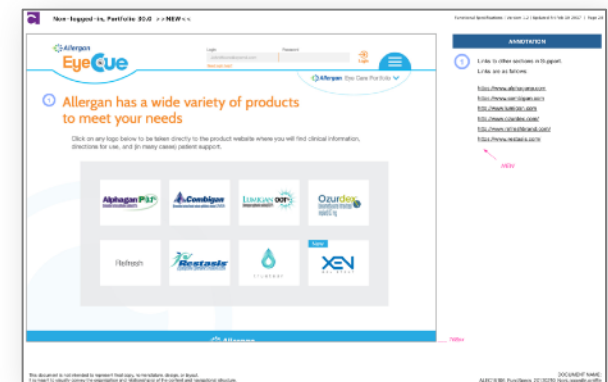
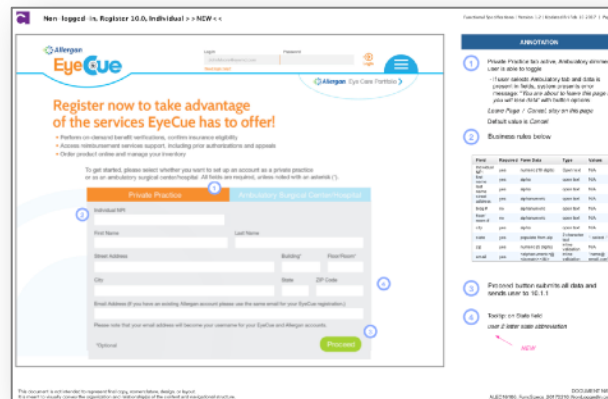
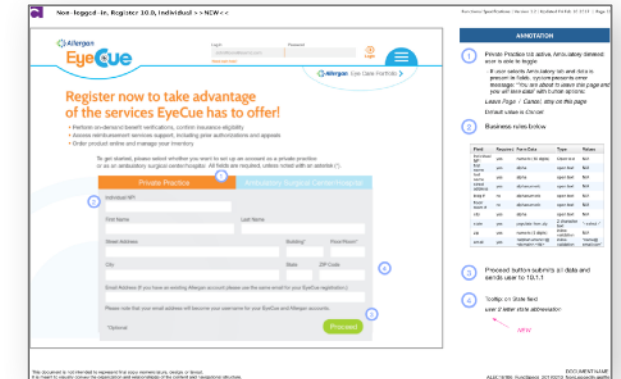
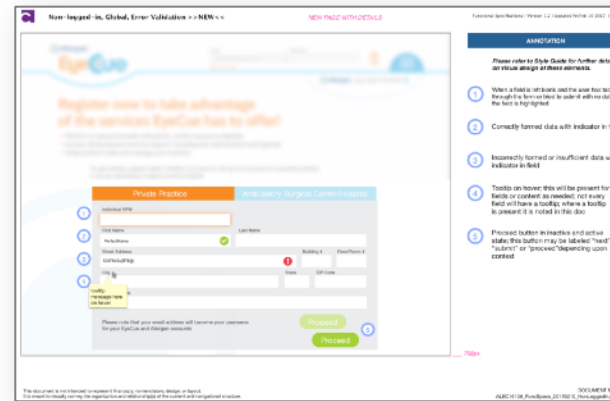
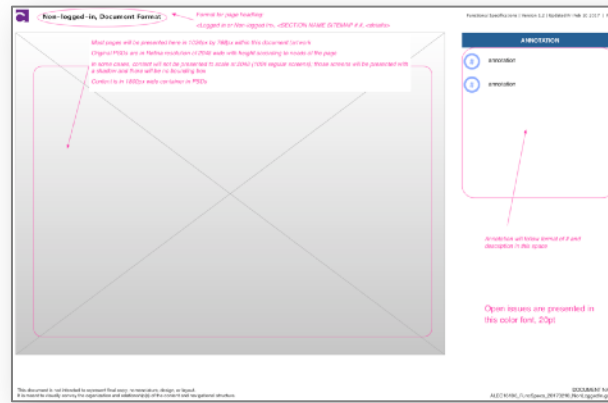
Working closely with visual designers, we put together different approaches for the look and feel that would capably present the data and content.





# Functional Specifications

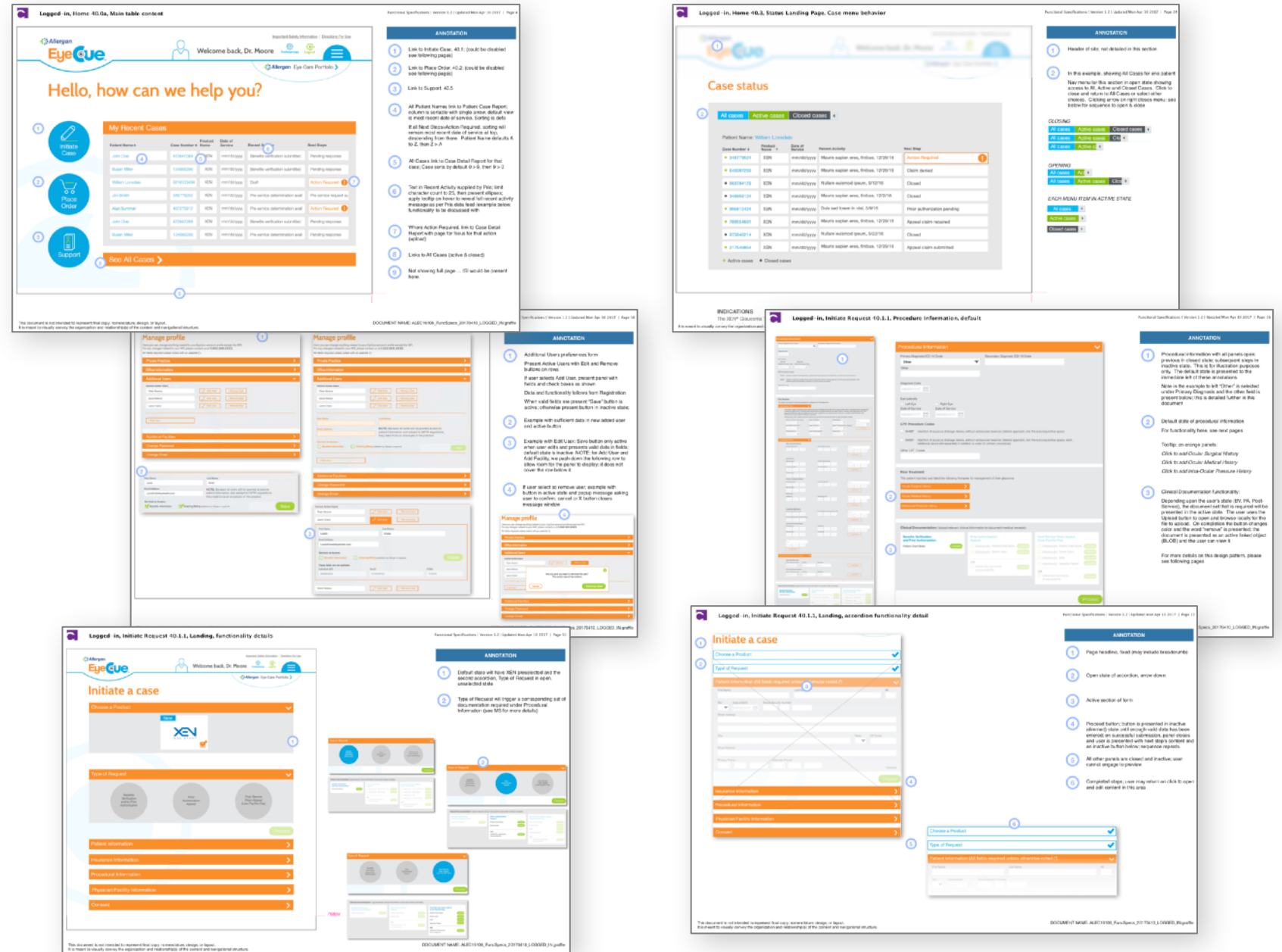
With a set look and feel, we went directly to annotated comps in a functional spec so that developers could begin building the application without wireframing every conceivable screen.





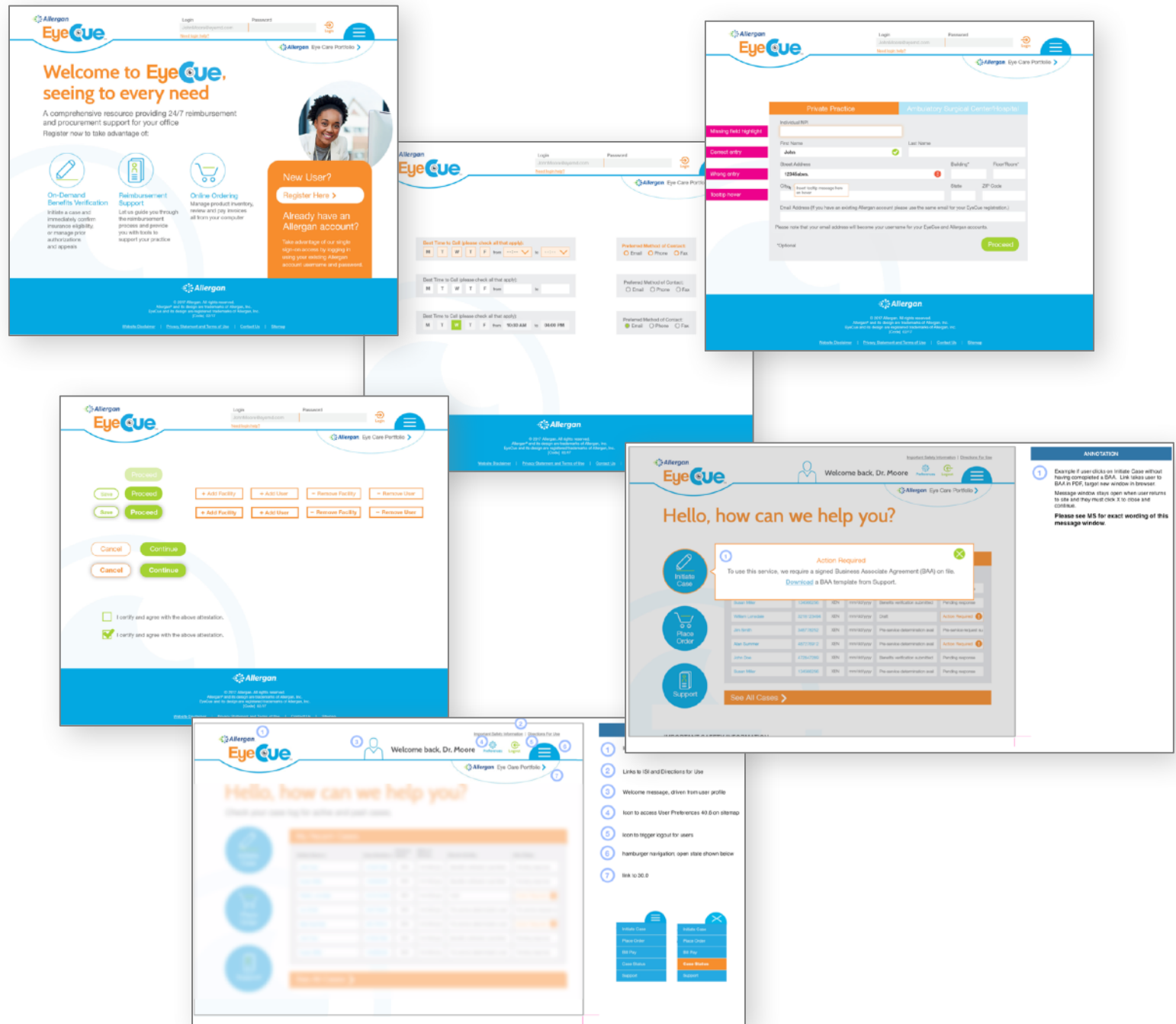
# Functional Specifications: data and forms

For the logged-in user presenting complex forms and multiple sets of data needed a clean UI that allowed users to manage the complexity.



# Style Guide

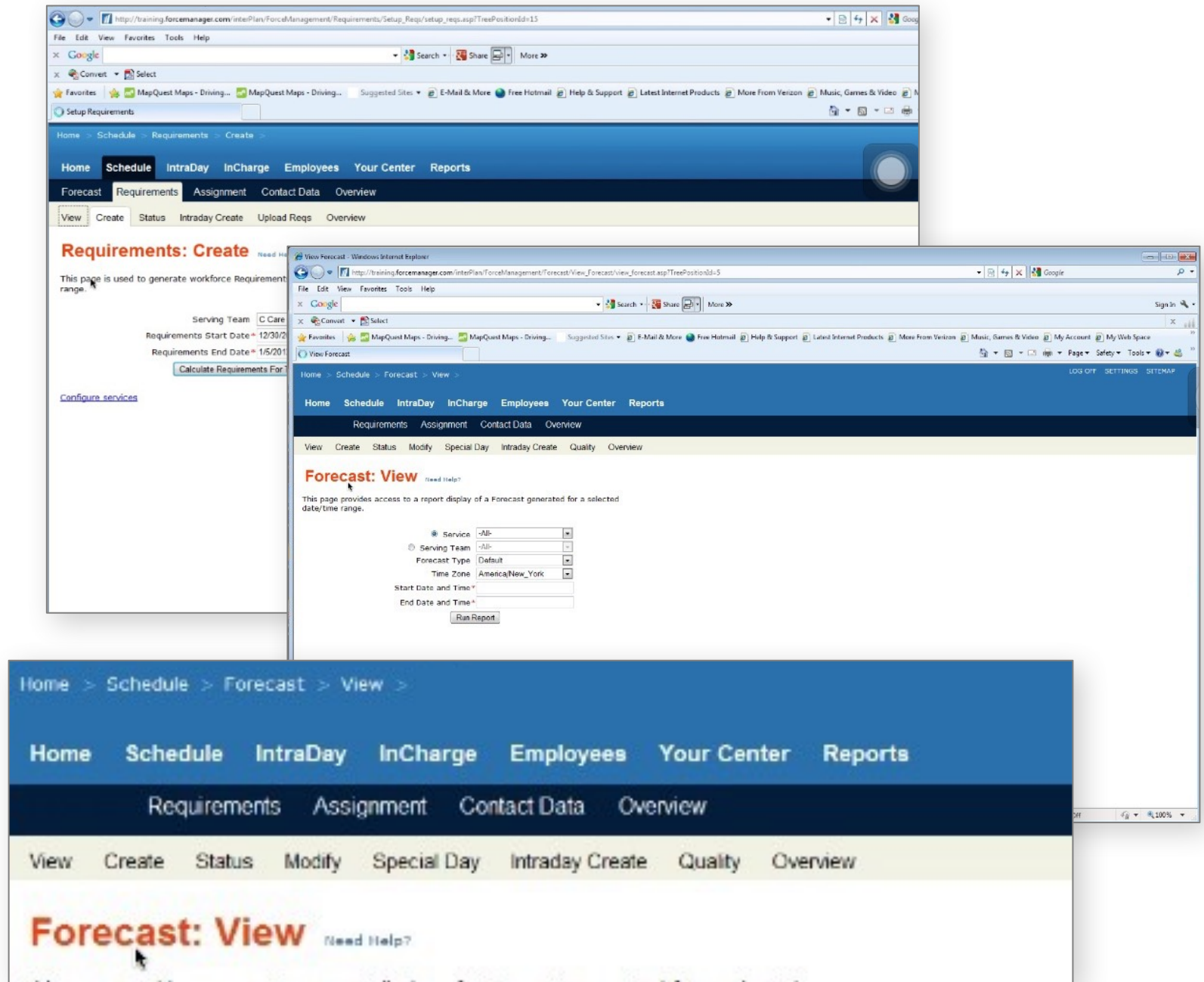
A style guide was the final handoff document to developers, explaining CSS and behaviors for various functions and components.



- Description:** Workforce management software enables large businesses to dynamically adjust staffing based on variable criteria. For instance a call center needs to be answering calls with less than 2 minute hold time, but a national commercial is airing, 8 people are out sick and there's a storm that has kept workers away from the center. How do you quickly adjust a staff of hourly employees?
- Situation:** ISC had created one of the more popular versions of workforce management, used by AT&T, among many others. Embedded inside a .NET ASP platform is an algorithm which can calculate adjustments for staffing on the fly. Unfortunately, the SaaS application hadn't been redesigned in years and wasn't taking advantage of modern web components.
- My Role:** I was brought on as the sole UX consultant and proceeded to analyze and breakdown the components of the application and how best to deliver a solution that developers could build, while taking advantage of such things as drag-and-drop functionality and a more fluid UI
- Solutions:** Content strategy, sitemap, wireframes, functional specifications, creative direction

# Existing Application

The application was built in ASP.NET and included a cluttered 4 levels of navigation in some screens, Additionally, much of the interface hadn't been designed to scale and analytics showed much of the navigation isn't used by most users.

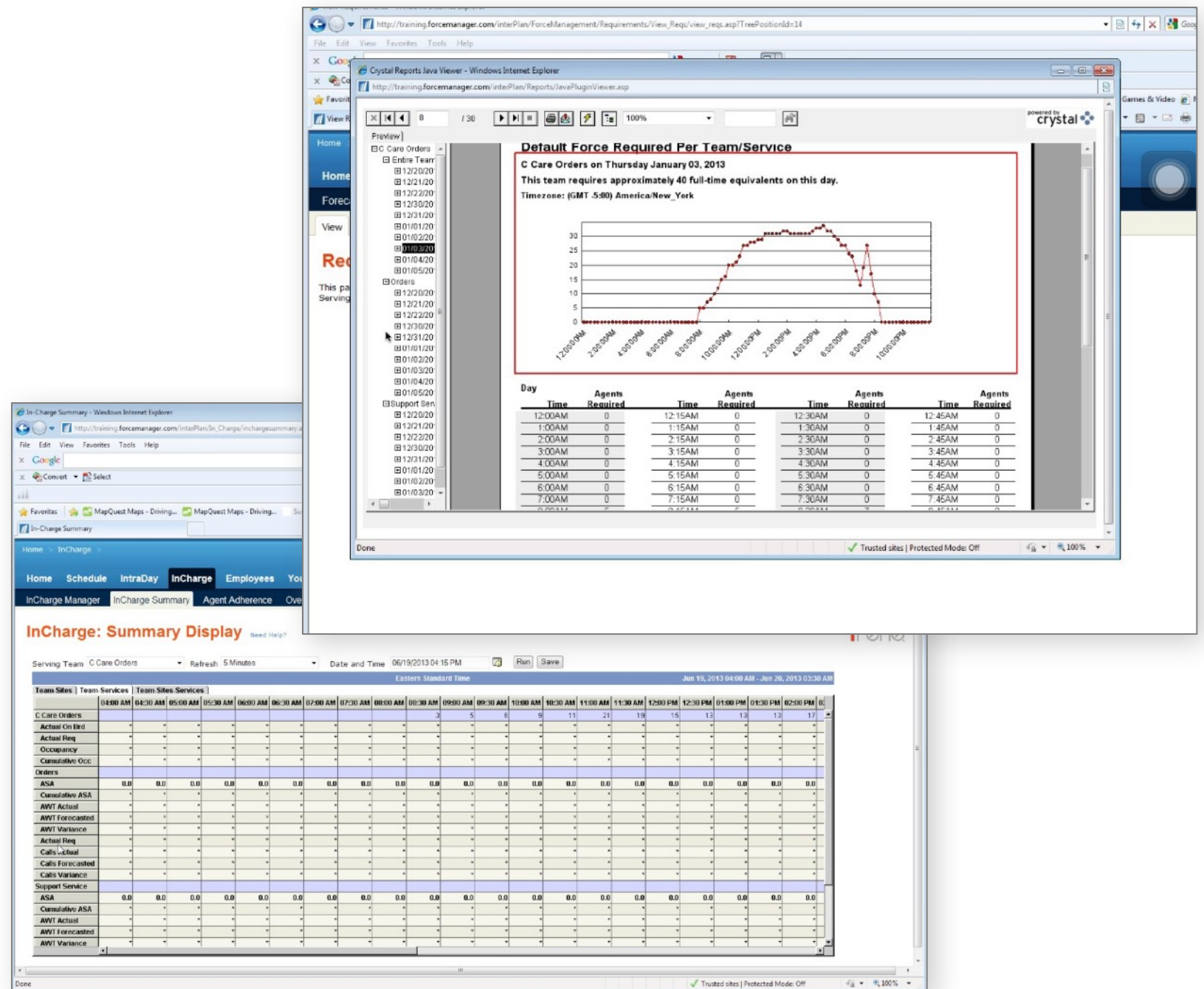




# Incharge Manager

This was the “secret sauce” of the application: users enter in data (staffing, time constraints, multiple variables) and the system would calculate how to manage the staff allocations.

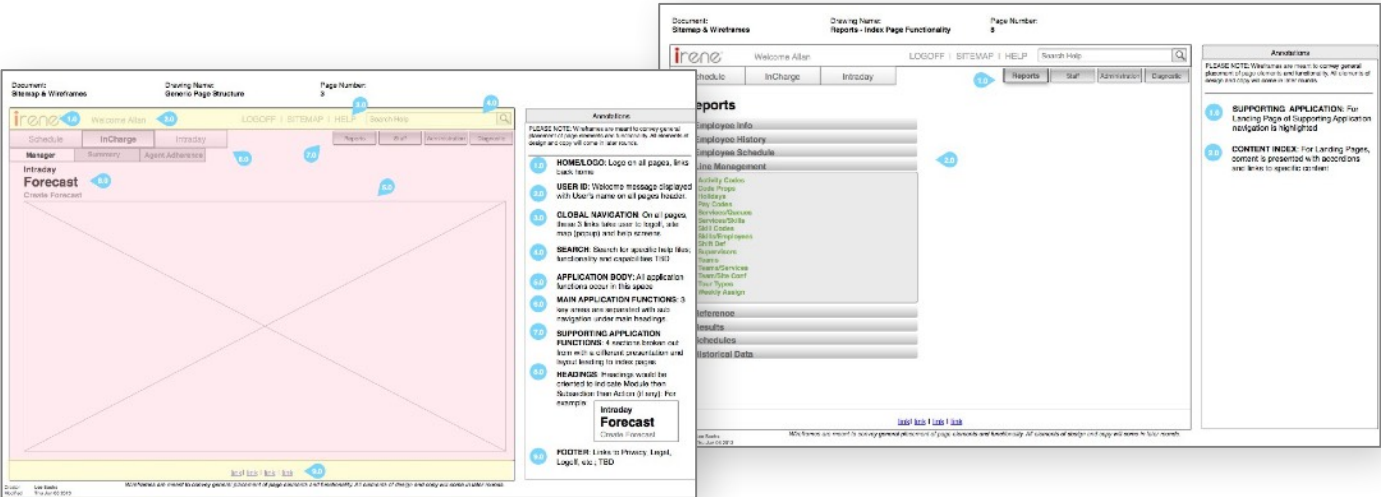
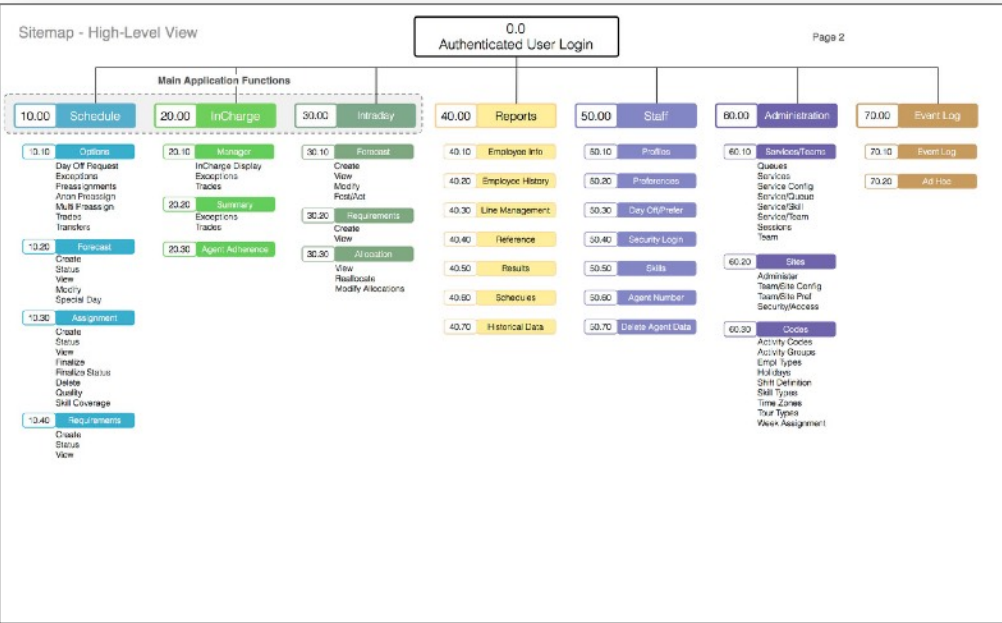
Unfortunately, the process required multiple steps and, only then, did it generate a spreadsheet in Crystal Reports which required further clarity.



# Revised Sitemap & Wireframes

Understanding from analytics, I could see there were whole sections of the application that people didn't use. I also reduced the stacked tabs and created a more streamlined information architecture.

These wires included annotation so developers could understand the global elements and functionality.



To get this application to be more usable and powerful, I needed to introduce predictive typing, prepopulating forms, smarter date selectors and many other modern widgets.

[illegible]

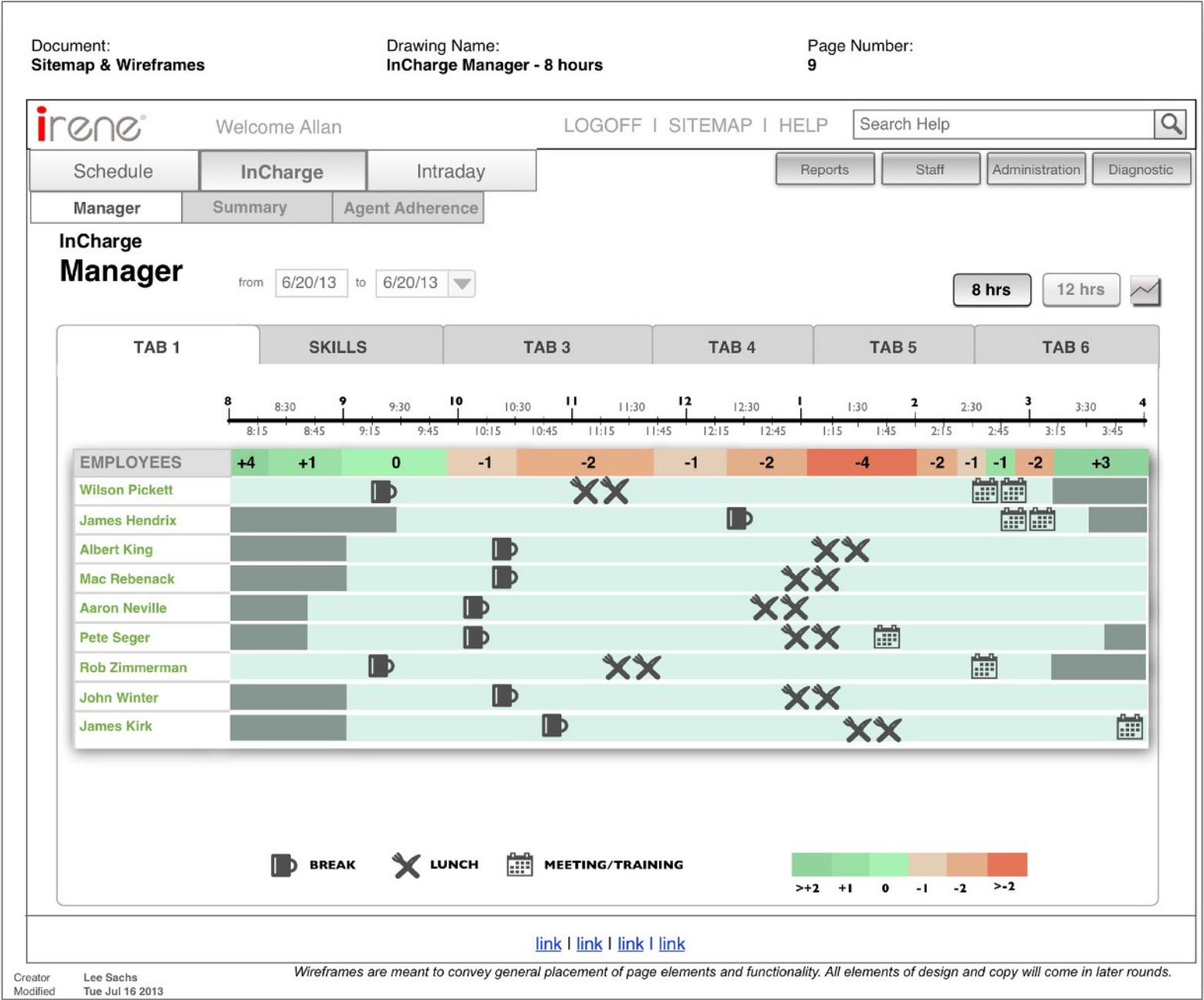


# A New Vision For The Application

It was just a matter of taking all of that data and presenting it differently.

Here the user not only sees the employees and their working time, but clearly sees their breaks and time off.

Most important, the color scheme alerts the user to critical periods when staffing allocations are down.



# Drag and Drop Scheduling

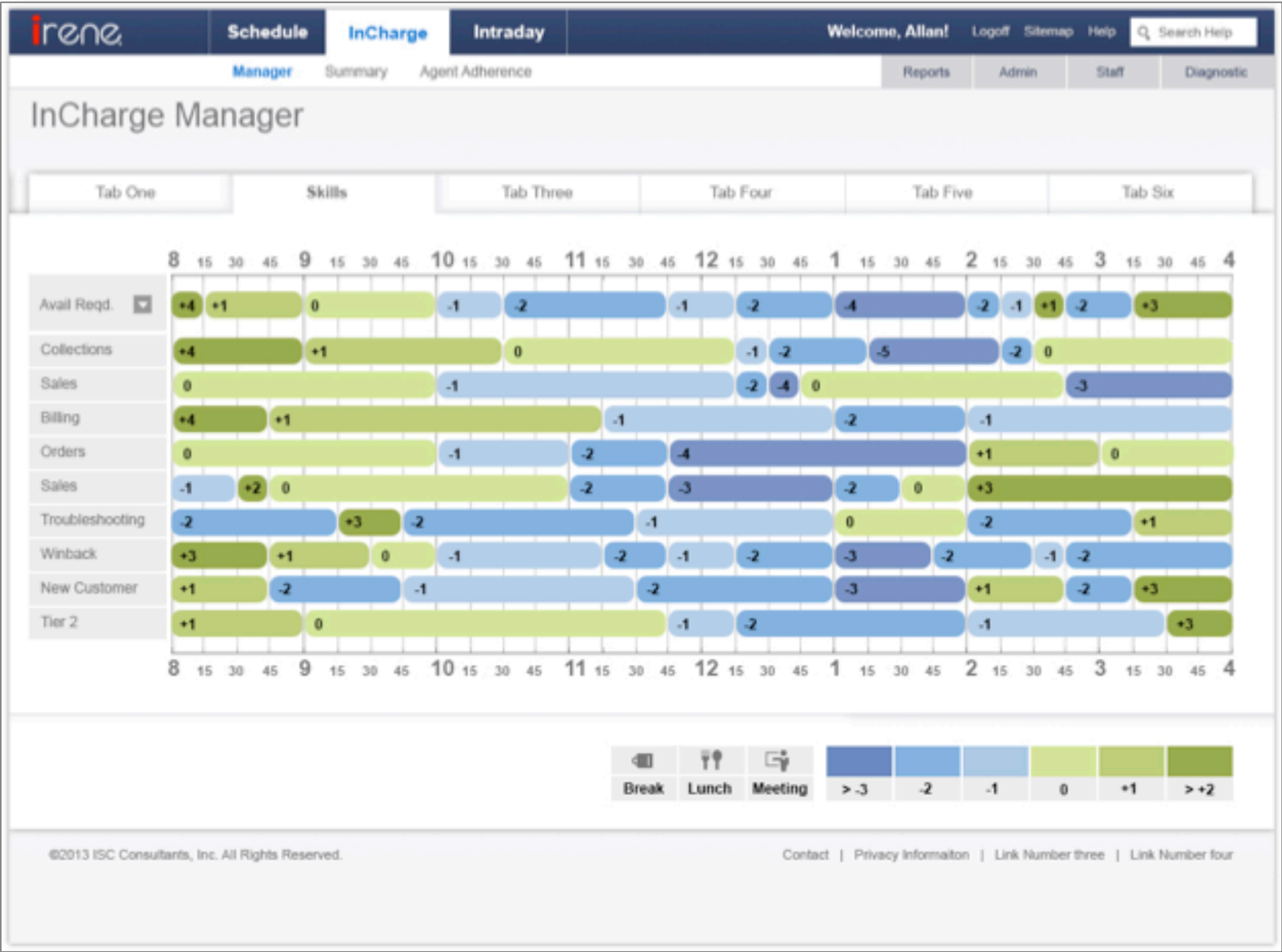
The Incharge Manager now has capabilities to move timeframes cleanly and easily on a click.

This was also critical to show developers how the application should perform, while a redesigned application still needed some creative additions.



# Creative Execution

An example of the reskinned UI built on the new vision for the application



# THANK YOU!

[lee.Sachs@gmail.com](mailto:lee.Sachs@gmail.com)

914.720.0292