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

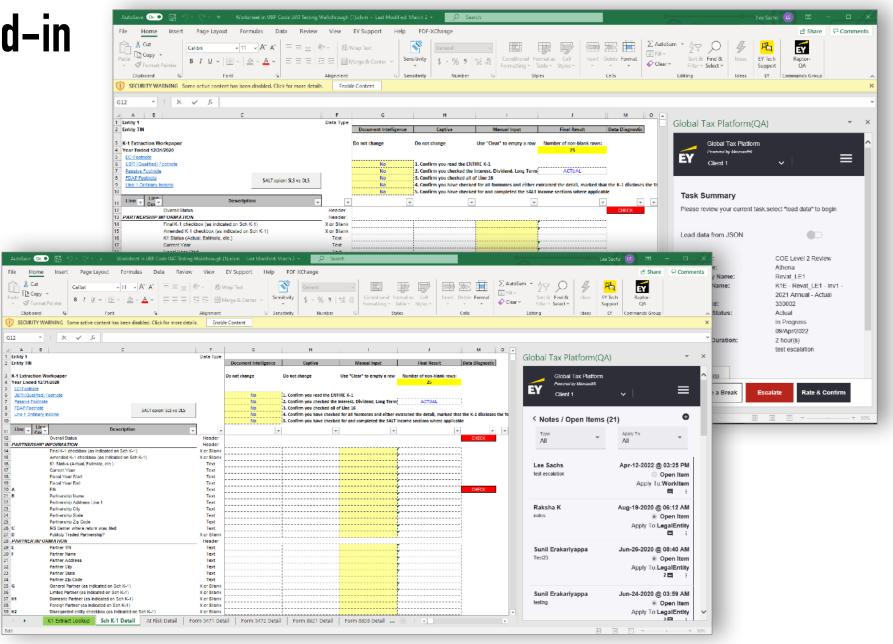
Orchestrator Excel Add-in

The Orchestrator app is a web-

- enabled add-in to Excel that
- tracks users tasks and provides

interaction through

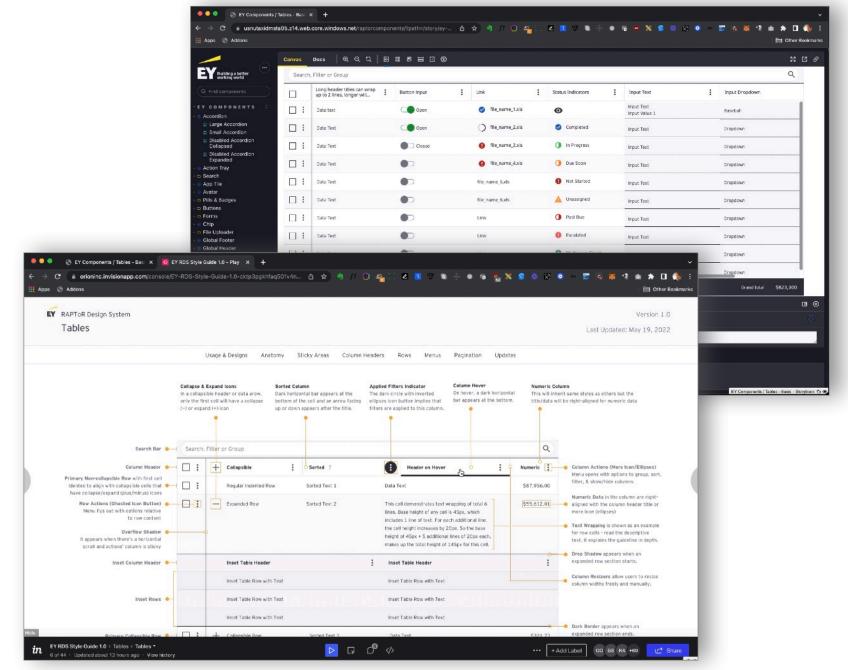
commenting and feedback to improve workflow. It does not actually interact with Excel but as tax accountants it presents in an environment familiar to this userbase.



3

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 cookiecutter because this application was unique because it operated in a panel and needed feature parity to the Excel version.

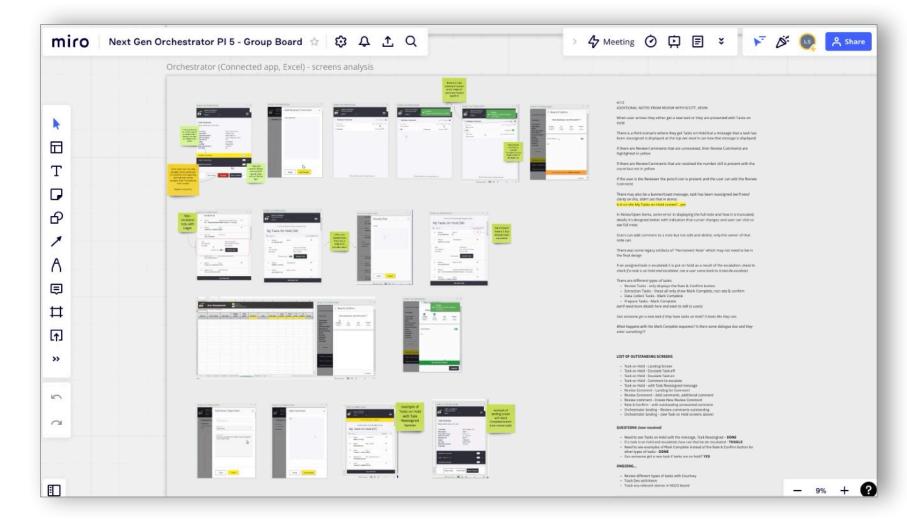


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Future of Work Initiative and Gig Worker Optimization

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.

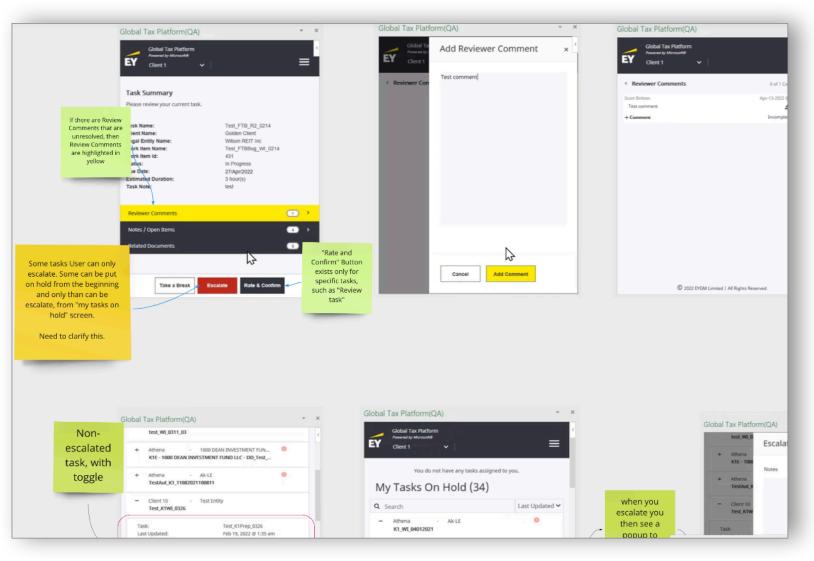
We needed to understand the flow of how users engaged with Orchestrator first before redesigning it.



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

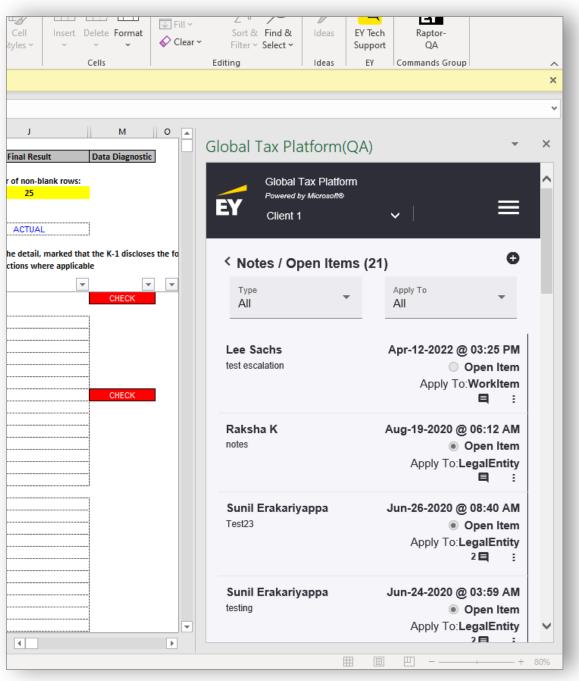
RAPToR has a whole suite of services but none of them functioned like Orchestrator; i.e. in a panel sitting beside the other applications in the main body.

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

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Today This Week Next Week Next 30 Days Year All incomplete Image: Complete State 60 Due Soon 90 </td <td>Last 4 Weeks Last 8 Weeks Co Departed C 200 100 100 100 100 100 100 100</td> <td>— Task</td> <td>How many notes or open items can be added, what is the usual quantity? Does the quantity depend on something?</td>	Last 4 Weeks Last 8 Weeks Co Departed C 200 100 100 100 100 100 100 100	— Task	How many notes or open items can be added, what is the usual quantity? Does the quantity depend on something?
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			- 60% + 😮

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.



8

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.

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	Orchestrator	×
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	Juliana Esposito This is done.	Feb. 2, 2022 at 11:09an
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ress 940 In Review	Juliana Esposito Document needed for final Internal Review before we submit to Client Review. More words for this comme	for Apply To: Legal Entity
	Add Comment	
	Document needed for final Internal Review before we submit to Client	Type: Open Item

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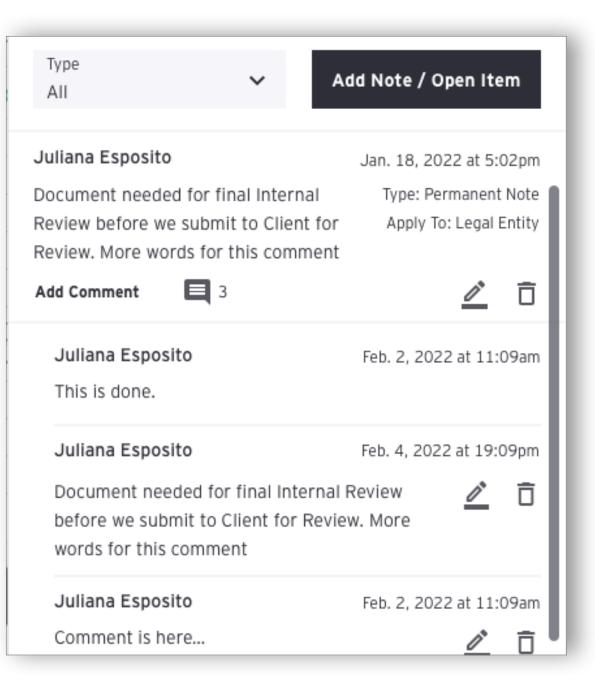
Notes / Open Items

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.

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Raksha K notes	-	0 @ 06:12 AM ● Open Item o:LegalEntity ■ :

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, side-by-side

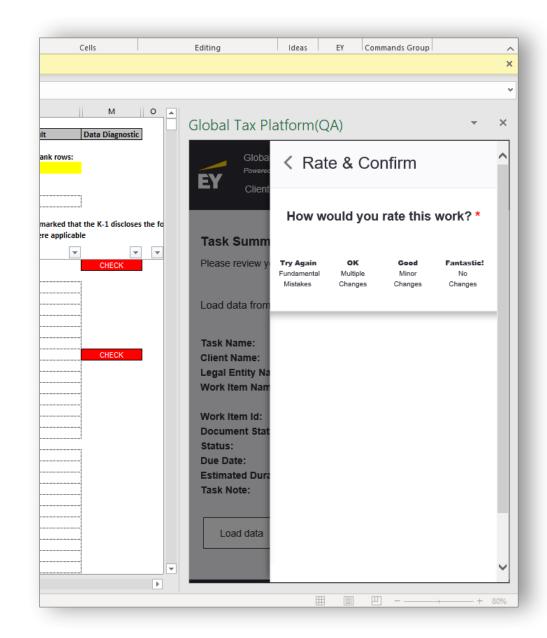
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Rate & Confirm

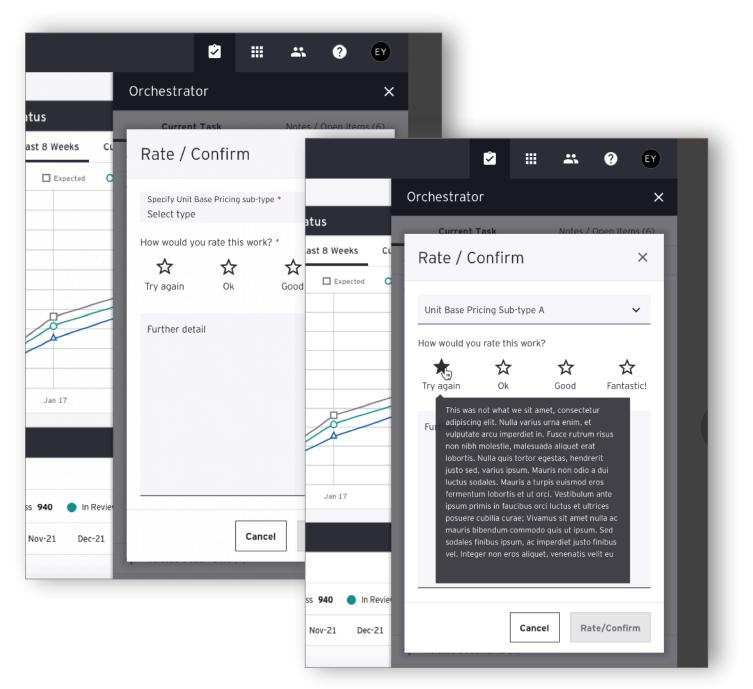
Another problem area was the Rate & Confirm section, where work was reviewed and evaluated.

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.

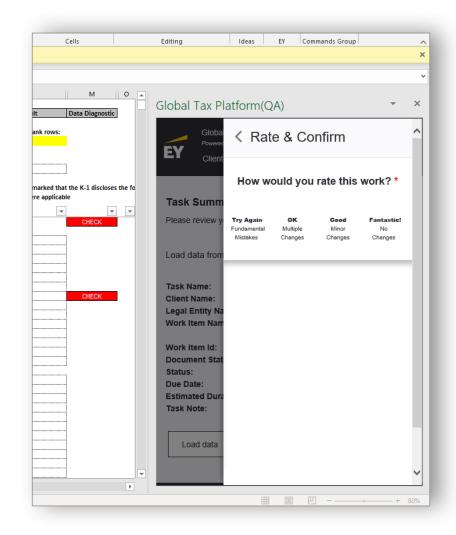


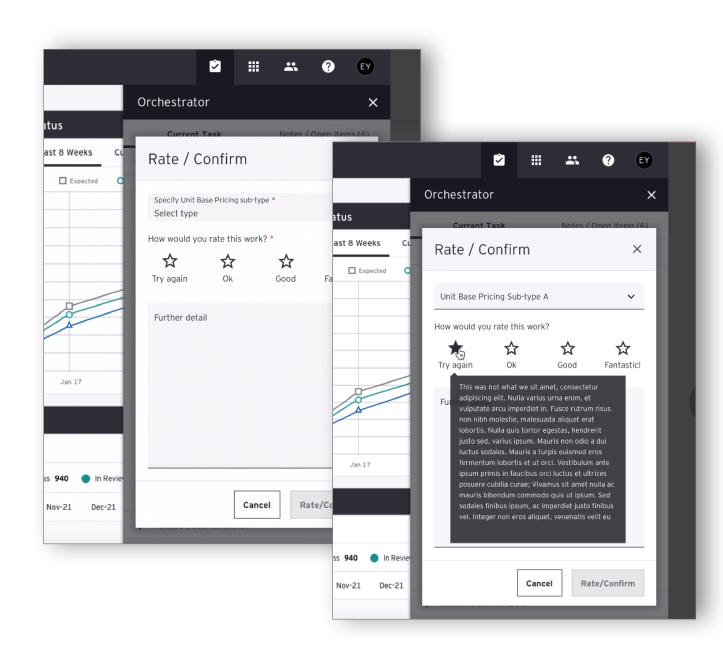
Rate & Confirm, revised

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

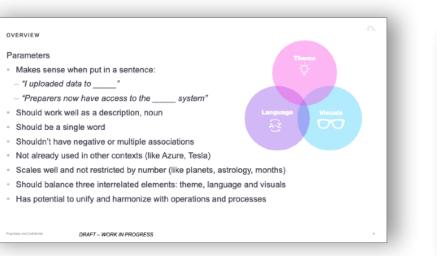


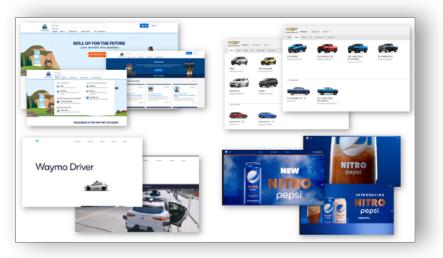


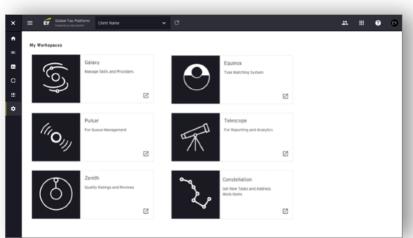
Orchestrator Taxonomy & Nomenclature

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.



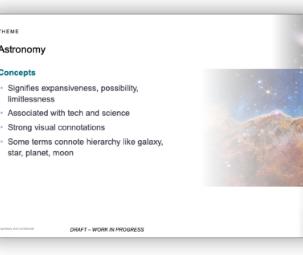




THEME

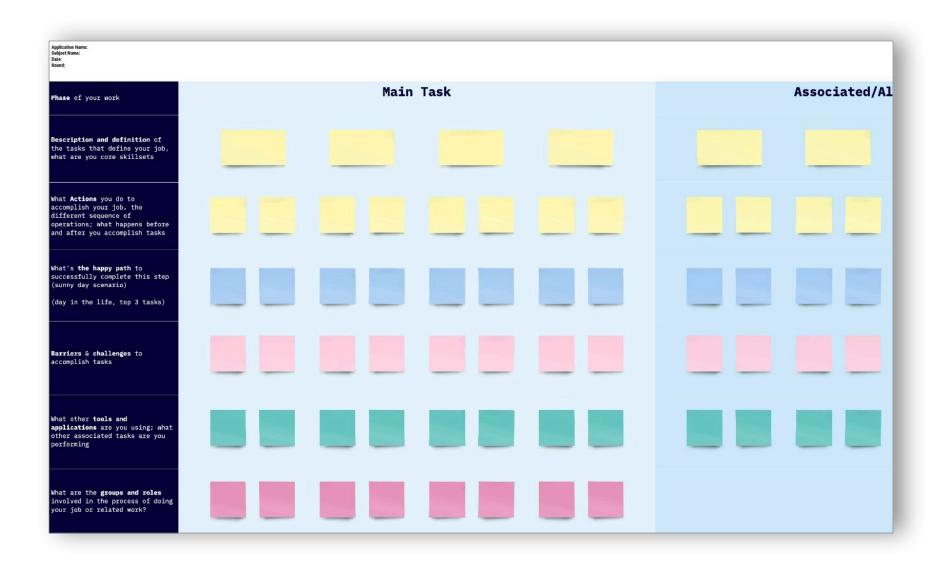
Astronomy

Concepts



User Research

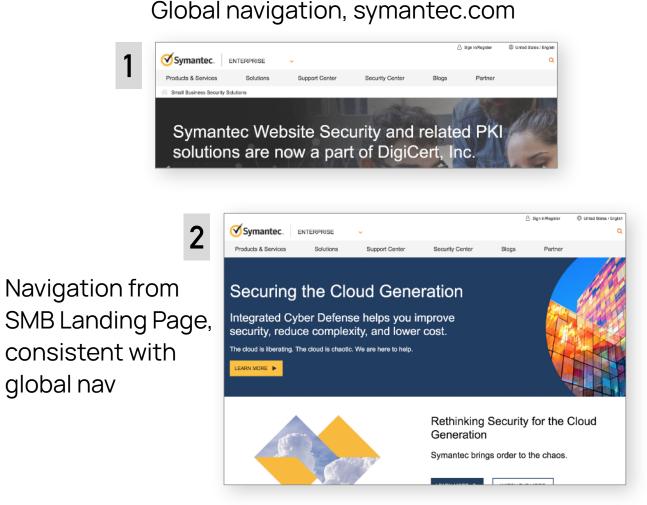
Another work stream started to expand user research across Future of Work users as well as all users in the RAPToR environment, both preparers and reviewers as well as service leads and product owners.



Symantec Small Business Ecommerce / PwC

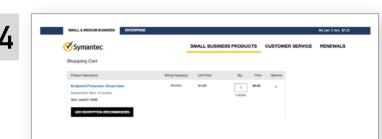
- **Description:** Symantec sells over \$15 million annually of cybersecurity software through their small and medium business eCommerce enterprise platform. New products were scheduled to be introduced and others were expiring along with a different pricing and bundling options.
- **Situation:** As 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



Navigation within SMB Product Landing page changes...





...changes again in product selection...

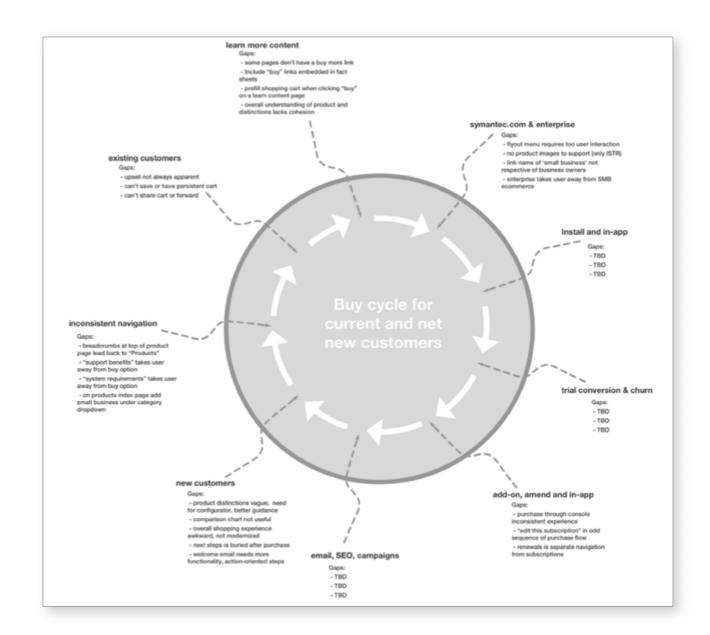
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Last Name*	Last Name	Order Total	\$28.00

...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.

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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.

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Mobile Wireframes, 2nd 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

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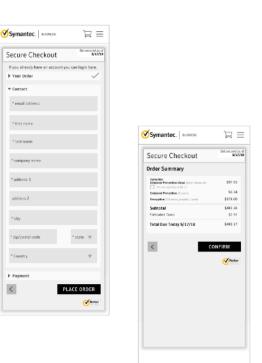
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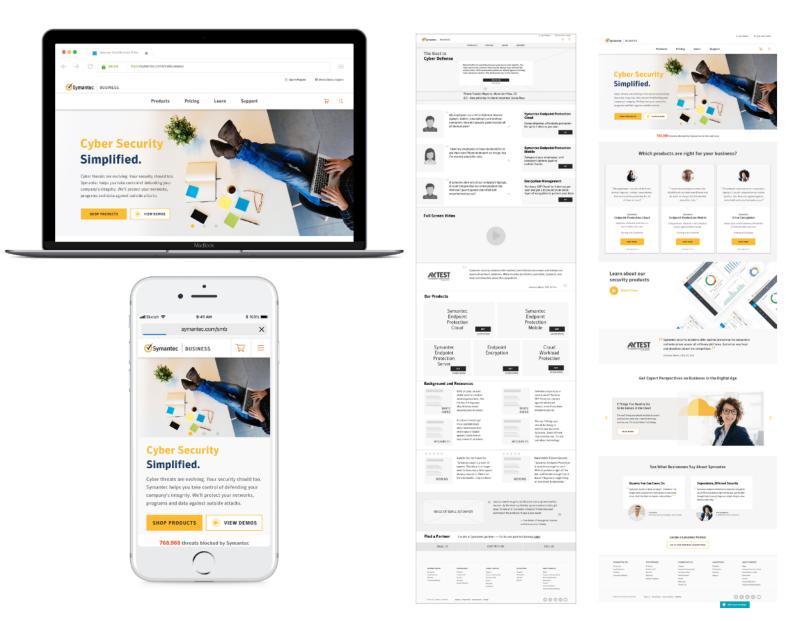
Desktop wireframes, 3rd round

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

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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.

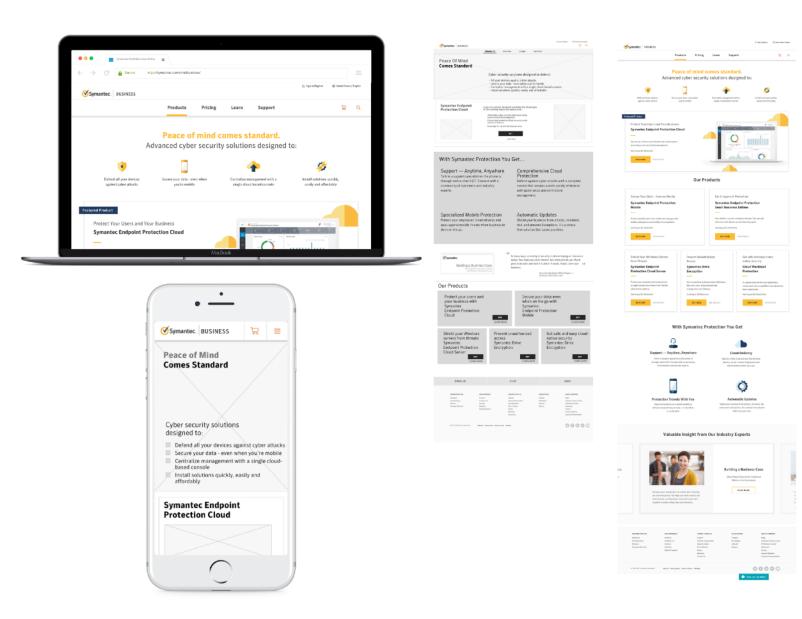


Wireframes, Copy, Comps: product landing page

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

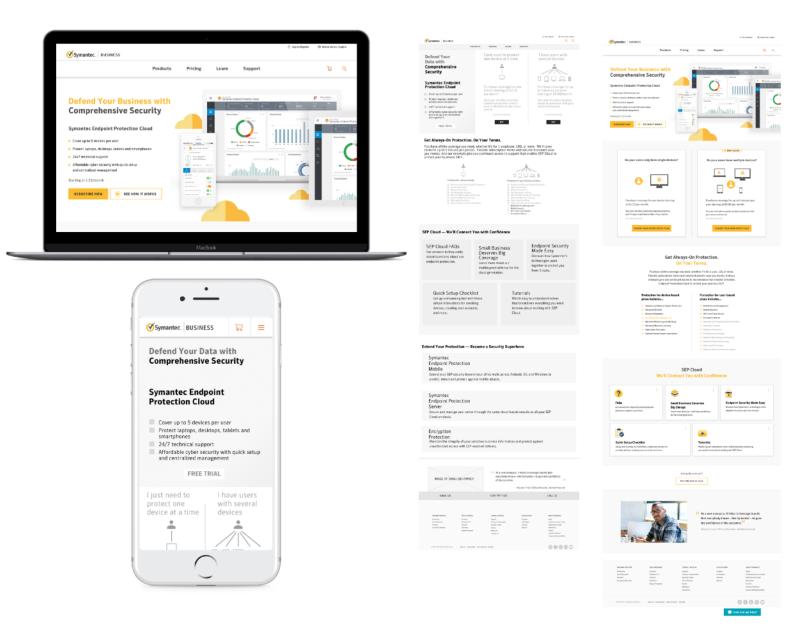
At this point, mobile was not

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.

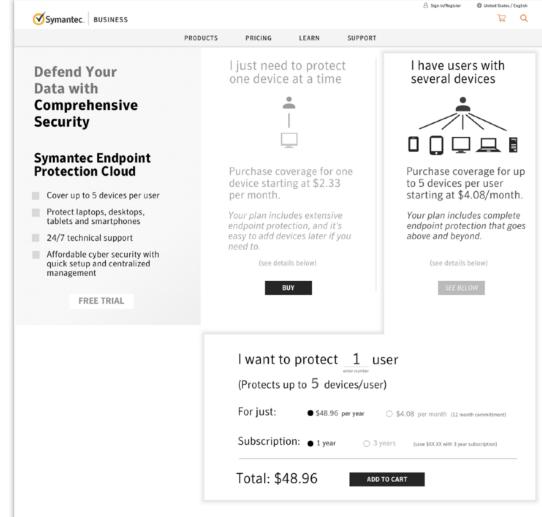


Wireframes, Copy, Comps: specific product page, buy

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.

Symantec	BUSINESS				A Sprinker	gozer @ United States / English	
	PRODUCTS	PRICING	LEARN	SUPPORT			
efend ata wi		l just nee one devic	d to prote e at a tim	ct e		users with devices	
	ehensive		•			:	
ecurit	у		_		//		
ymante	ec Endpoint		<u> </u>				
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Protect la	to 5 devices per user ptops, desktops,	per month.				it \$4.08/month.	
tablets P* 24/7 ter	d emartabanse	Toon praint inc		0	rour prant		Dorbed States / English
Affordal quick se	Symantec. BUSINESS	PRODUCTS	PRICING	LEARN	SUPPORT		¥ Q
manage			Liusting	ed to pro	tact	have users	with
	Defend Your Data with			ice at a ti		several devi	
	Comprehensive			<u>.</u>		÷	
	Security						
	Symantec Endpoint Protection Cloud			coverage fo		Purchase cover	
- 1	Cover up to 5 devices per use	r	per mont	nting at \$2 h.	.33	to 5 devices per starting at \$4.0	
- 1	Protect laptops, desktops, tablets and smartphones			ncludes exten		Your plan include: endpoint protection	
- 1	24/7 technical support			devices later		above and beyond	
	 Affordable cyber security with quick setup and centralized management 			details below)		(see details belo	w)
- 1	FREE TRIAL			BUY		BUY	



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

	Products Pricing	Learn Support		βQ
Defend Your Business w	iala =	Symantics Symantics	P	John Admin. U Kitimaw
Comprehensive Security		Campundial Jonan O 18 Sector Alian Jonan D 19 Sector Alian Sector Alian Sector Sector Alian Sector Alian Sect	Territoria Constantino de Constantina de Constantina de Constantina de Constantin	
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24x7 technical support Affordable cyber security with quick setup			11 lui.	Sees atta
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	User-based subscription:	a far	have single device	is?
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	protection, and it's easy to add later if you need to.		Coverage for one douis	_
			Coverage for one devic starting at \$2.50 per m	
CHOOSE YOUR	USER-BASED PLAN		CHOOSE YOUR DEVICE-BAS	ED PLAN
	How many users do yo includes protection for			
	⊝ 20	(+)		
	20			
	How do you want	to be billed?		
	How do you want			
\$90	\$98	0 \$2	2,200	
\$90 PER MONTH 12 month		0 \$2	2,200 For 3 MARShd save	

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.

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HIGH-LEVEL PRODUCT DEFINITION FOR AMchart

INTRODUCTION

This document attempts to define the physical, front-end application interface and its capa particularly with attention to how the user will interact with the product. This is not a techn analysis and is intentionally decoupled from some of the blockchain imperatives, the tokeni system, decentralized data and much of the enterprise architecture required to build out th

This document also represents what we can determine at this moment in time. Concurrent be a dynamic collection for high-level requirements and features we want to include that a defined.

The sole objective is providing patients with control of their health data through ease of use and robust access to available EHR/EMR. We can consider this system a PHR or Personal Health Record. The primary objective here is to define how the final product will function and how it will look and feel for the end user.

APP ESSENTIALS

1 of 3

- A stand-alone app patients will have on their mobile device which will contain all of medical history
- Patients will own their data and the system will have the power to provide a unive record at will
- The app will be able to port seamlessly to whatever EHR system the provider office
- · Any data tied directly to the patient will be placed on a HIPAA-compliant cloud The app should also integrate with insurers so that benefits are clearly defined, cop
- managed and payers reduce paperwork
- Doctor's EHR systems will have the ability to write to the app

DATA ENTRY/FIRST USE

Users will download the app from the Apple App Store or Google Play Store, establish an ac proceed to populate the app with their health data. Following an agreement to terms, in ord automate data entry, the app will have the ability to access a user's PII (personally identifiab information)

Users will then have the ability to edit and correct any information in the app The app should have the ability to scan cards (for instance an insurance card) to reduce the typing in insurance information

The app will be HIPAA compliant and meet all standards of patient privacy and security The app should include the following key data sets:

Full batien

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- Insurance information, type of plan
- Recent medical information, tests Hospitalizations
- Medications, dosages, how long prescribed Allergies and contraindications based on existing medications

DESKTOP VERSION:

The app will have a desktop interface which will sync with the user's mobile app. Users will to update the mobile app and find the same data on either interface. (whether the app will in native OS code or responsive is yet to be determined)

SENDING RECORDS

While the app will contain a great deal of patient data, it will not necessarily house the data the device. For instance, an MRI may reside on a server elsewhere. But the app should have ability to know the existence and location of that record and and a patient can securely prov way to transmit that record either through a unique URL or other means.

MODES

- The app will have different modes of operation based on the user's behavior and other factor Manual Input Mode: user is inputting information into the app
- Automated input Mode: the app is drawing information in from a source (following a visit their EMR inputs a diagnosis) Output Mode: user is sending information to different sources
- Reporting or Browsing Mode: The user may casually review their health record or the
- request the device to give them a report of activity for the past week's blood press other data:
- · Gathering Mode: the app is passively drawing in dynamic information from a user's v devices (FitBit, Apple Watch, etc.) and building profile information

FRONT-END USER INTERFACE

The app will have make use of Apple's Healthkit as well as Android's Fit platforms to integra It will integrate with whatever other wearable devices or peripheral components users may integrating with already. The app will have capability to access other device apps as calendar camera, push notifications, etc

- Some additional considerations for the design and build of the app include: Mapping of the user interface relating back to the Functional Specification
- Validation of user and security issues
- Identification of dynamic content vs. static Style sheets and overall look and fee

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- Page weights
- Any other multimedia objects used

MESSAGING AND APPOINTMENTS

The app may have the ability to message from within or through the device's email to doctors, nurses, etc. The app may also integrate with the device's calendar or an appointment-setting application.

THIRD-PARTY INTEGRATION

Already Doctodoor has been introduced as part of the app. As other vendors or partners are introduced how do we preserve the structure and framework we are defining without breaking it or changing it significantly? As this document avoids discussion of the blockchain, we will need to broach that within the UX at some point

QUESTIONS/OPEN ISSUES

- Any ecommerce potential? Could a user pay their bills through this app?
- How do we manage other doctor's the patient is in the care of? What are the HIPAA constraints on sharing this information between providers and does the patient need to engage?
- Any connection to any social media intended?
- What are some of the considerations for a patient getting all this info into their device? Some data may be required in order to proceed but the patient doesn't have it at the ready. How do we verify for mistakes and keystroke errors?
- What if patient is involved in a clinical trial or there's some other edge case? · What capability will we provide to port to different formats? (PDF, XLS, attach files to email,
- etc)
- How do we account for the blockchain and tokenized framework in the UX of this app?
- The rich output of data from this app, even anonymized, is extremely valuable to the healthcare community as well as marketers and drug makers. What are the plans to manage and (if possible) monetize this data.

The sole objective is providing patients with control of their health data through ease of use and robust access to available EHR/EMR. We can consider this system a PHR or Personal Health Record. The primary objective here is to define how the final product will function and how it will look and feel for the end user.

UX Best Practices

This document was

written expressly for this

team and not simply

copied from an online

source like Wikipedia.

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USER EXPERIENCE BEST PRACTICES FOR AMchart

INTRODUCTION

This doc is an attempt to familiarize the AMchart team with User Experience. For s may be repetitive but given the pace of the project and the work that's been done to put down some definitions.

User Experience (UX) has become an established practice in the development of sy applications across a multitude of devices and interfaces. UX is not just the design pages or the way a menu opens on a phone. It comprises the entire lifecycle of a u interaction with any system whether it's for browsing, purchasing or accomplishin are engaged in User Experiences all day, not just on our devices or at work, but she traveling, watching TV.

The UX practice has evolved to be well-defined and a vital part of the design and d process. Good UX sis in the sweet spot between the business's needs for a solutio creative elements that visualize that solution and the hard code of developers that vision a reality.

While AMchart is on a very fast track to get to market, we may not be able to mee of these steps in the process but it's important to understand the ideal scenario and ran frid efficiencies so we can get the application launched on schedule. What foll outline of UX Deliverables with details to explain what might be part of our work, these items is specific. The only 2 tems that can be run concurrently are the deve Wireframes and Visual Comps. Completion of one task is condition to proceed to the tems that should be included are in *talics*, optional items are in grey.

DELIVERABLES

Stakeholder Interviews – There's a reason we call it "User" Experience. In an ideal don't do anything until we talk to Users. This can be time-consuming and complex. use proxies for users, SME (subject matter experts) who can speak for what users a need or do. Currently Rose and Kels are our SMEs.

Product Definition – This would be a short 1-2 page document explaining the prod terms. It's important we understand we're launching a <u>product</u>, not just code or an product you buy has gone through rigorous and extensive evaluation being specific and articulated in this way.

Business Requirements Document (BRD) — This can be a living document detailing requirements for the product based on the Product Definition. The BRD can be ve defining the business rules for every field as well as the functionality. It may comp

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members, contact information, version notes, user flows, technical diagrams and a great de other material associated with the product.

Use Cases – At a very simple level, a use case is a structured narative explaining the user int and what we want the results to be. These are written to explain how the different actors w interact with the system and decompose what we want the system to do. There may be use cases depicting not just users but also interactions between systems. There may be used and variables within a particular use case. Documenting use cases can lead to additional use cases and the process continues until all possible variations and conditions are met. (User Stories, a more commonly used part of Agile Methodology will be included in Jira to help developers complete tasks.)

User Hows or User Journeys – User flows illustrate visually how a user navigates through a or process while engaging with a system. The User Journey is similar but might be tied to Personas (see below). We may not employ user flows if the Use Cases are documented tharoughly enough and we have a strong enough consensus around the application's functionality.

Personas - Personas are specific hypothetical users we might create to make sure the User Journey is complete. For instance, we may identify a single-mother who lives in the city will child who has cystic fibrosis to see how they would use the system.

Sitemap – A sitemap is a diagram of the main navigation within a site or application. It may mirror the User Flaw, but it will be more specific with actual nomendature for the links of the site. Nomendature will be a key part of the sitemap since these will be terms we use in the II and menus and determine the hierarchy of information.

Content/Asset Analysis – Any text and associated graphics with the site needs to be correlat with some existing documentation. Even a simple form requires field labels, error messages, tooltips and instructions to support. This can be a copy deck, it can be rendered into the wineframes or be a completely separate manuscript. The same goes for graphic assets althou these will carry other particulars (dimensions, alt tags, etc.). Lastly any page outside of the la should have SD factored in which includes metodata, description, etc.

Wirefame – Driven from the Sitemap, the wireframe is usually a flat, grey-scale rendering a screen with as much detail as is necessary to explain what the objective of the screen is. Wireframes may also be done for different page types. There might be one "article type" wireframe but there may be many different wireframes for different forms because they will differ on every page. Wireframes will usually be done with thit to no design, although shou be done for mobile as well as desktop. The wireframes are only representations of pages but not the puble-policitation will not will be the rendered application.

Visual Comps – it is important to separate the visual design from the wireframes as these serve 2 different purposes. Things like branding, look and feel, logos, photos are all part of the

2

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Comps. Sometimes we can work an general comps for a home page and interior page look and feel at the same time we're working on the wireframes. But the separation of the two tasks is critical to making for a seamless build. Visual comps will have to be pixel-specific and include CSS details for developers to work with.

Annoted Wireframes (or Visual Comps) – In order to get a design into development we will work with either Wireframes or Comps that have the level of detail necessary for development. We can determine with development what the best way is to get designs coded. This may involve using tools like Invision or other online presentation methods that help us mimic the behavior of an application.

Functional Specifications – We will probably not be doing functional specifications at the level needed for this application. With enough annotation of wreframes and good communication between design and development, we should be able to forego the need for detailed functional specifications.

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).

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USER TYPES – AMBULATORY OFFICE

Ambulatory Office USER TYPES

In our discussions about EHR/EMRs, we started with the list below of *Roles By Title*. Th 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 syste for any specialist since it can capture anything that happens in the exam. I listed out K 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 assig features to each role. We can also offer to customize the systems for the office (for a 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

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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
- Ophthamology
- 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/their kids' health
- · Primary acquisition channel: email, provider,
- Primary device: desktop/laptop, tablet, mobile
- User type: group/family

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

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/speca on a regular basis, maybe in the assisted living and/or longterm 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+)

Demographics: any age Behaviors/beliefs: tracking activities, deal with complaints, staying on top of compliance,

Ambulatory Side: Office Manager/Super Users

Ambulatory Side: Receptionist

Demographics: any age

referrals, mail)

summary),

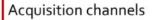
 Goals/motivations: making sure that the office is generating money, patients' and employee management

Behaviors/beliefs: multi-tasking (on the phone, greeting patients,

Goals/motivations: save time/streamline check-in & check out process

(collect payment, set up follow up appointments, provide patients with visit

- 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



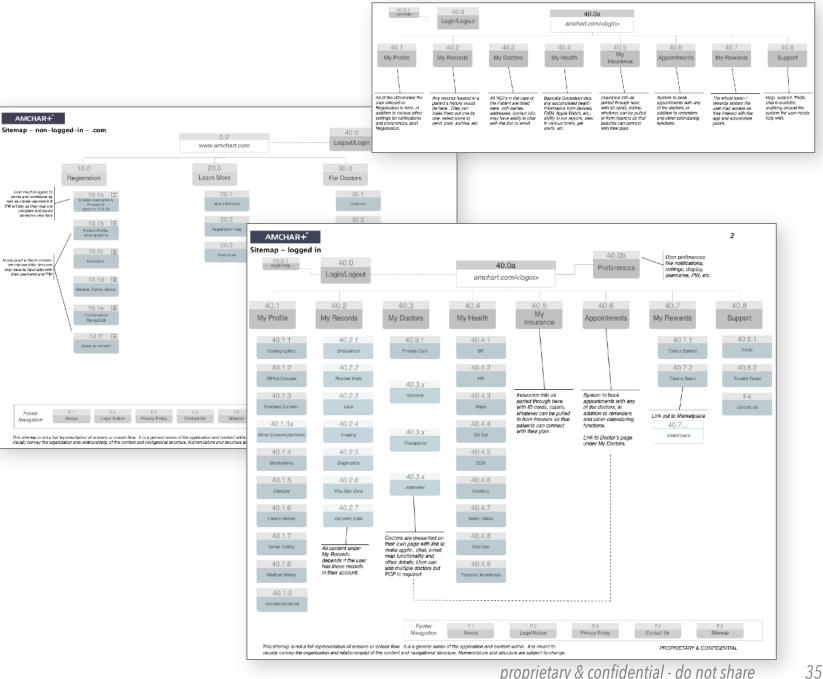
- · Social FB, Twitter, LinkedIn, Sermo, Doximity
- Emails
- Doc 2 Door app (fitness app)
- SEM
 - .com
- Marketing campaigns
 - Online marketing, SEM, digital media, affiliates
 - Other healthcare entities (providers, insurers, pharmeceutical companies, KOLs (key opinion leaders)
 - Guerrilla, WOM (word 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.

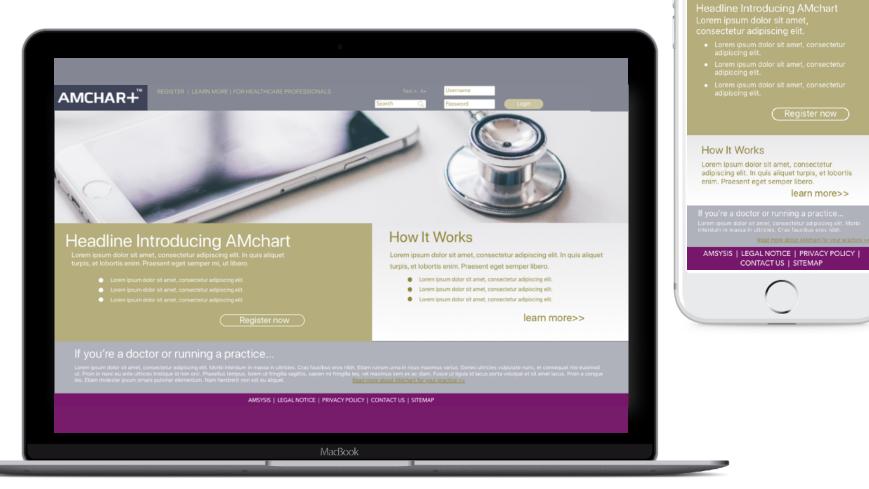
- Top right is an early organization
- of content for logged-in users and below that a more detailed

version.



High-Fidelity Wireframes

Sometimes I must create highfidelity 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.



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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

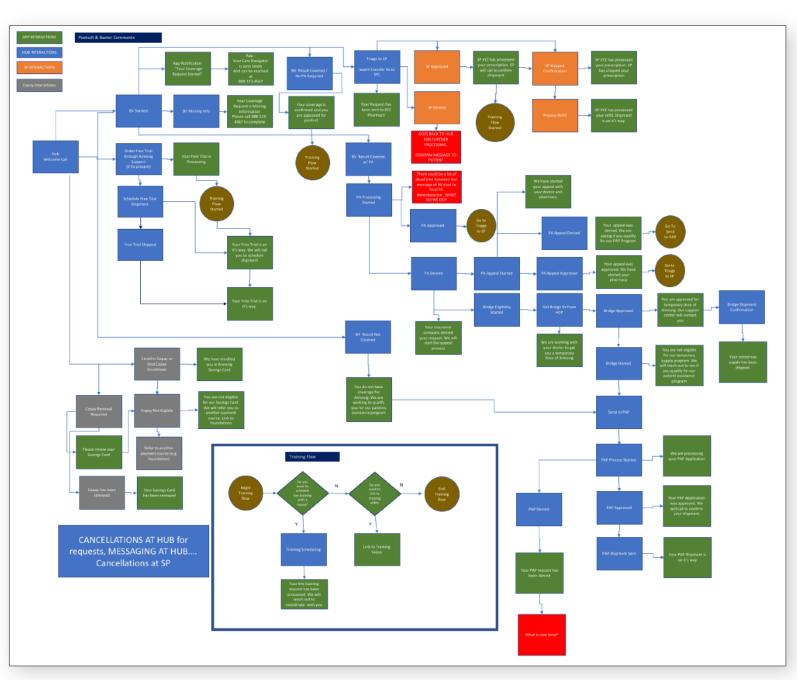
BV/PA User Flow

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.

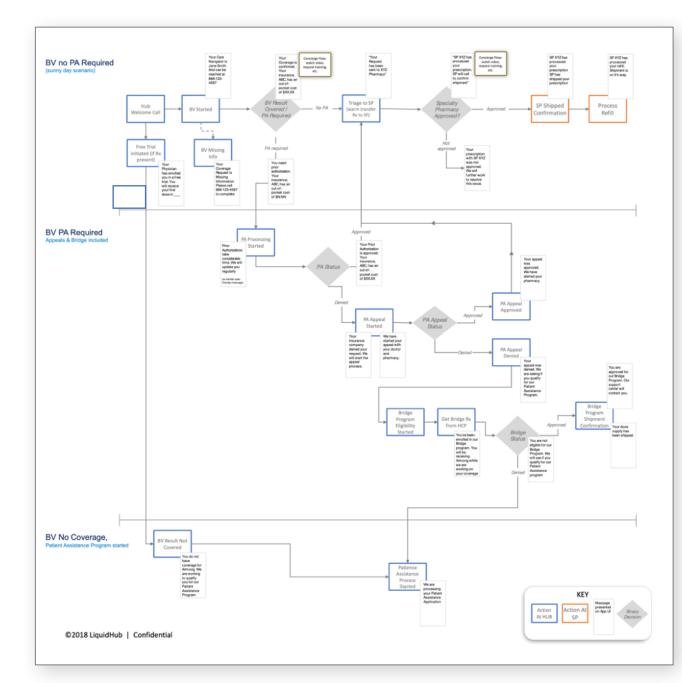
BV is "benefits verification" and PA is "prior authorization."

(SEE NEXT SCREEN)

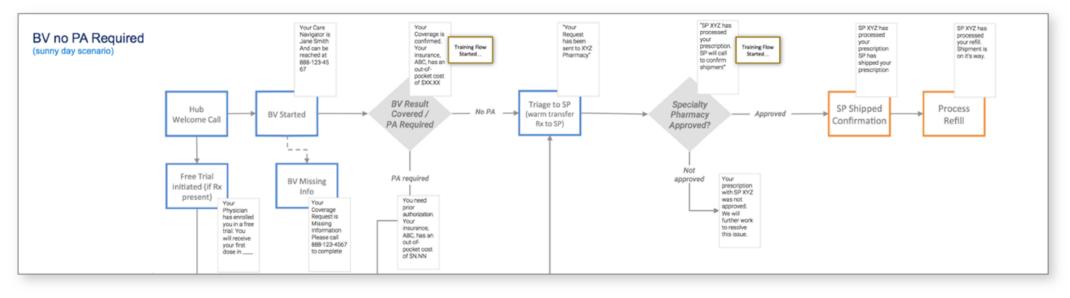


User Flow, revised

- 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)

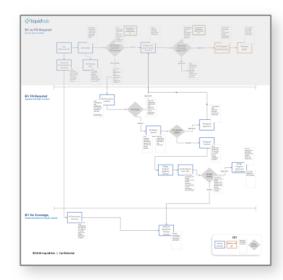


Flow Details



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)

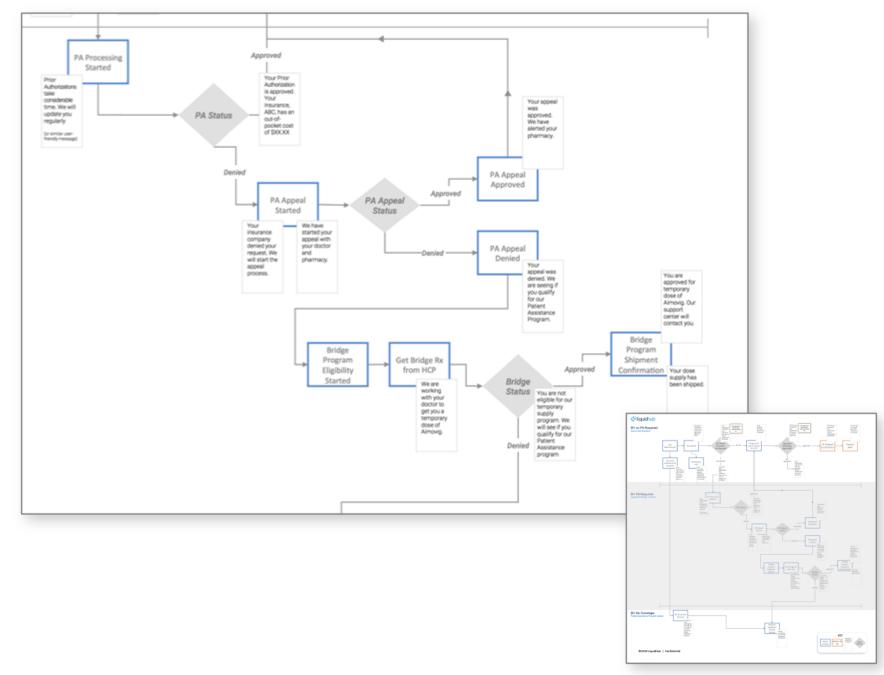


Flow Details

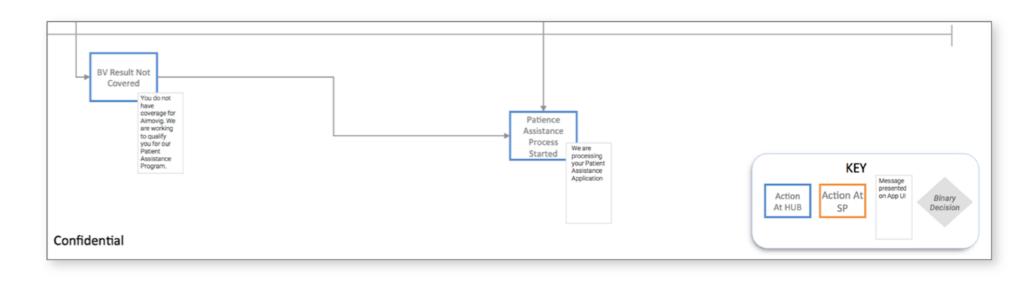
In the 'sunny day' scenario, the user gets coverage from their insurer and is able to get the drug shipped directly to them. The vertical rectangles represent messaging presented on the app.

(SEE HIGHLIGHTED AREA IN BOX

ON RIGHT)

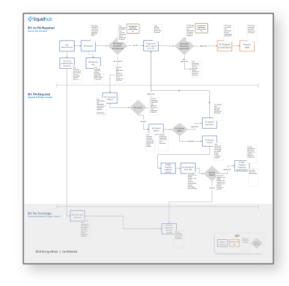


Flow Details



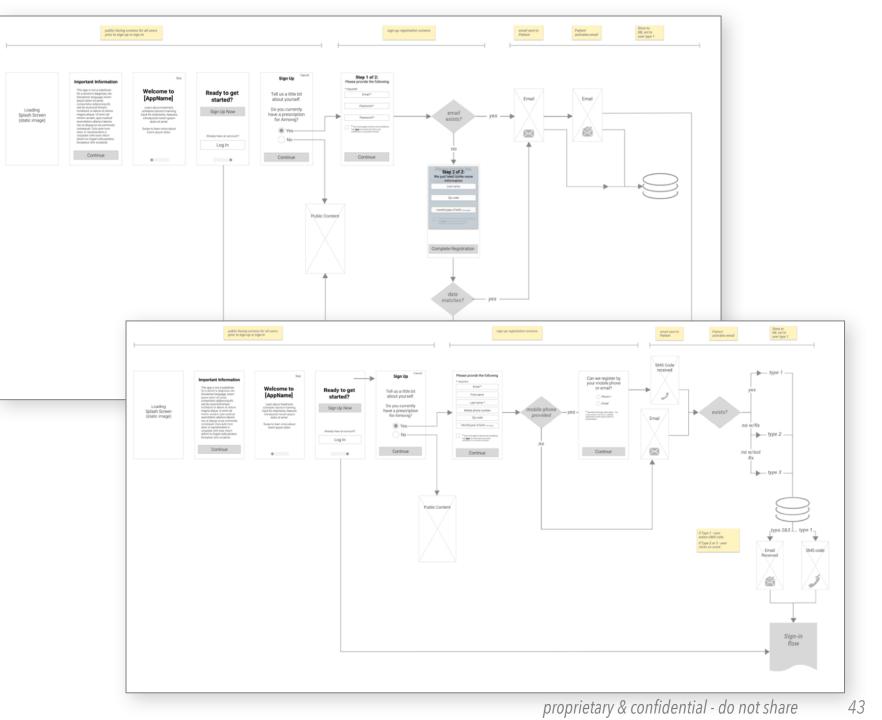
If the patient cannot get coverage or the prior authorization cannot be obtained, they are given an option to go through a Patient Assistance Program.

(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.

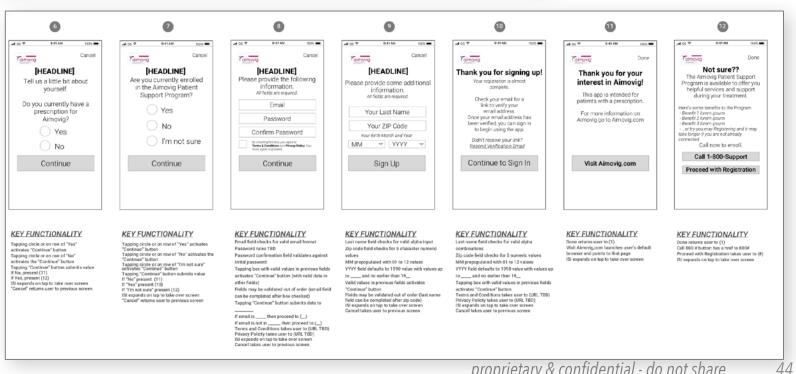


Early Wireframes

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

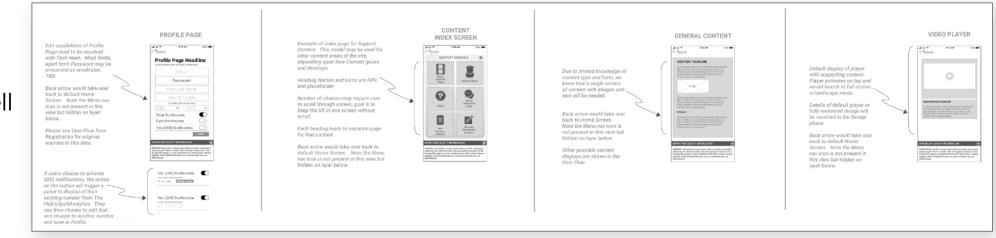
Face ID.

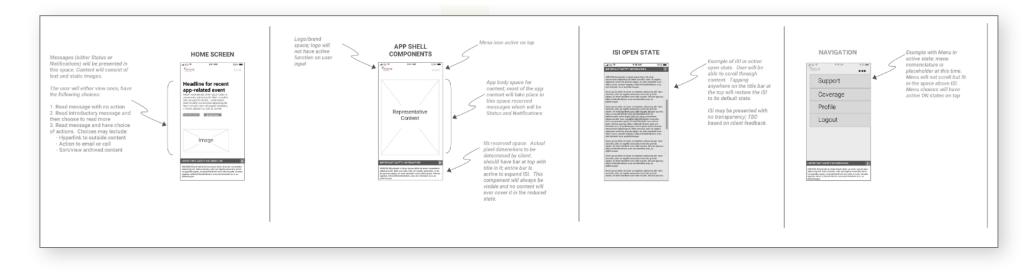




App Shell

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

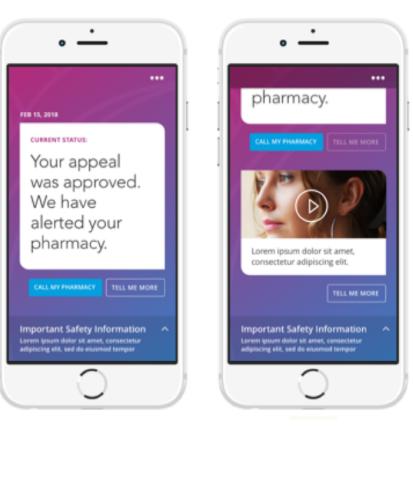


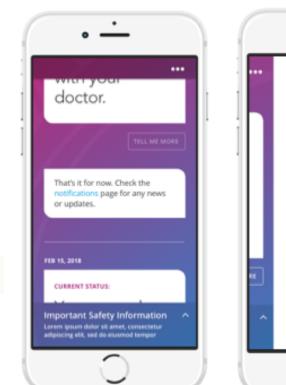


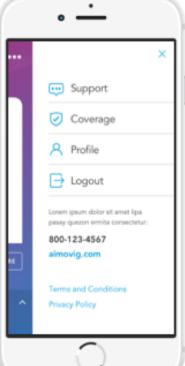
Visual Designs

Following approval of the wireframes and app shell, here's example of a visual

design concepts presented.





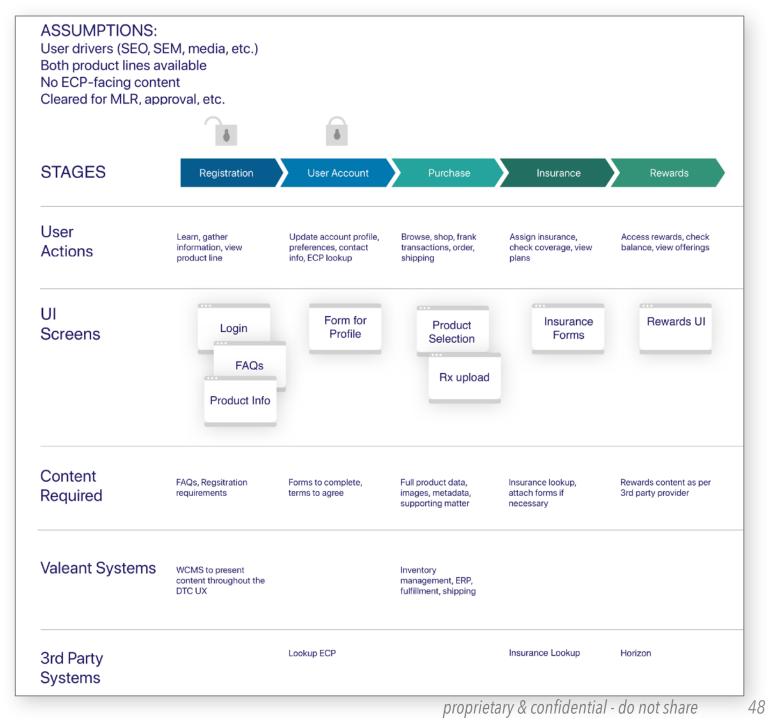


Bausch & Lomb / Photon

- **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

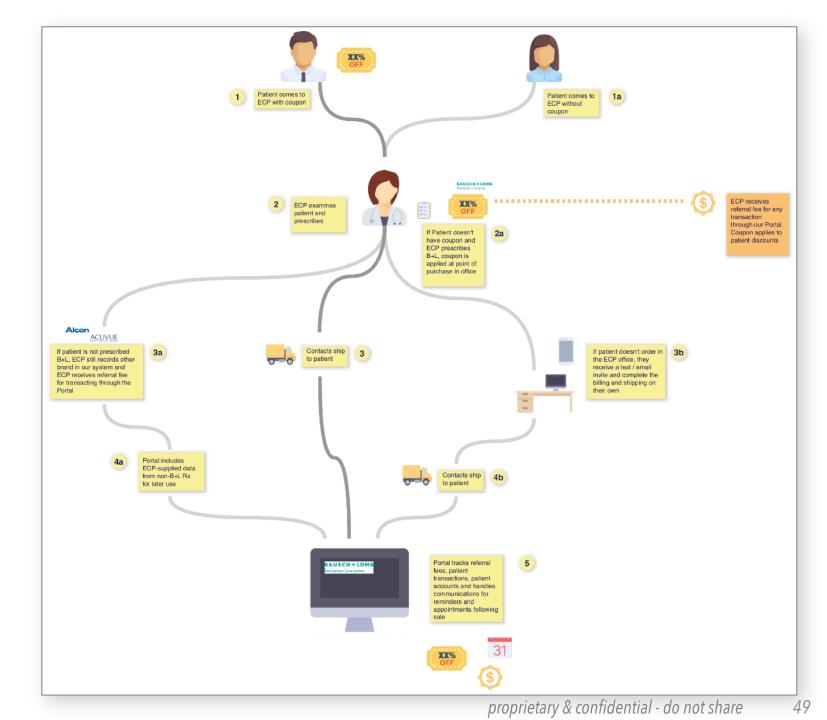
Project Roadmap

- 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.

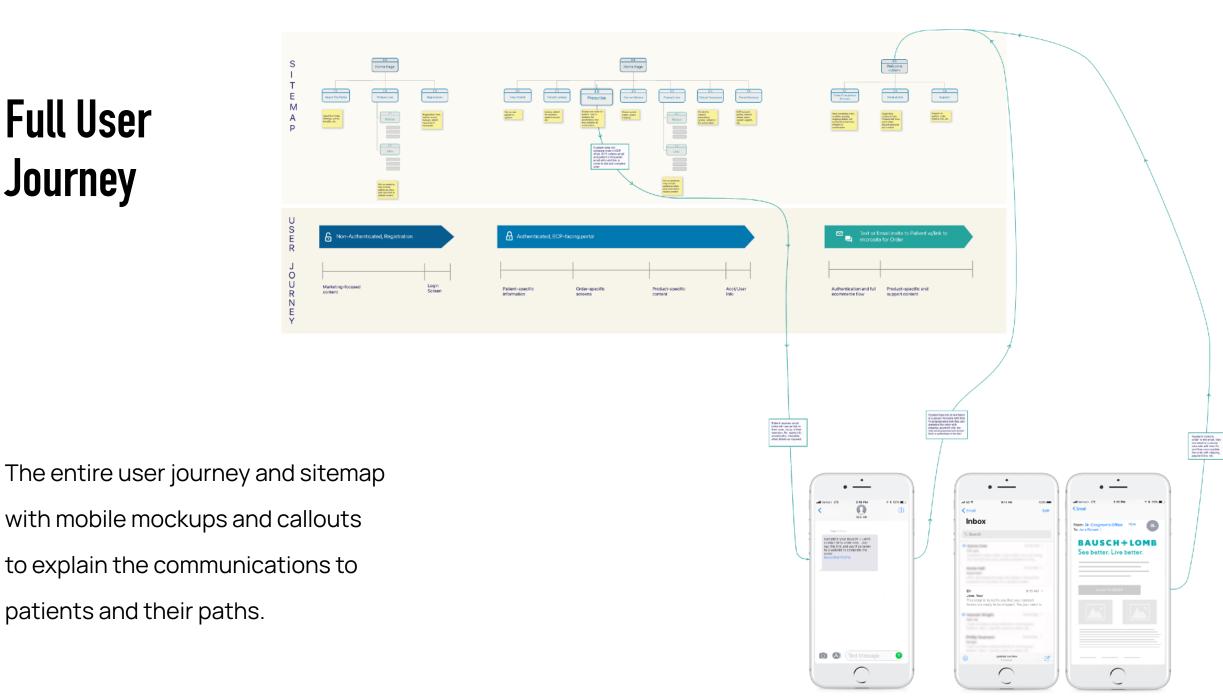


Referral Model

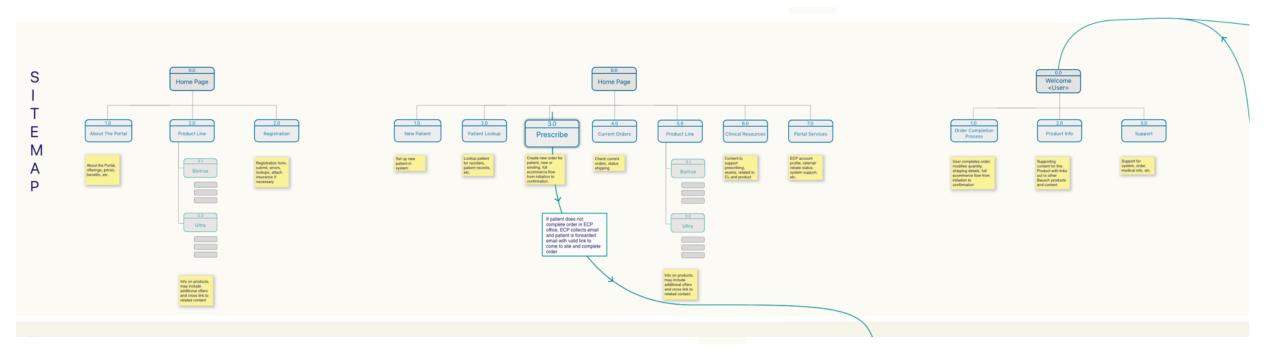
The business needed a high-level diagram to reflect the "referral model" this entire system was built upon. Highly regulated communications between doctors and patients needed to be vetted by MLR (Medical, Legal and Regulatory) to determine the product's viability.



Full User Journey

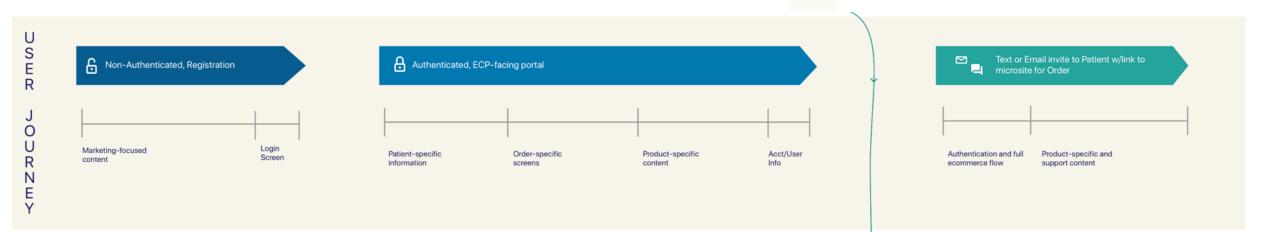


Sitemap



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

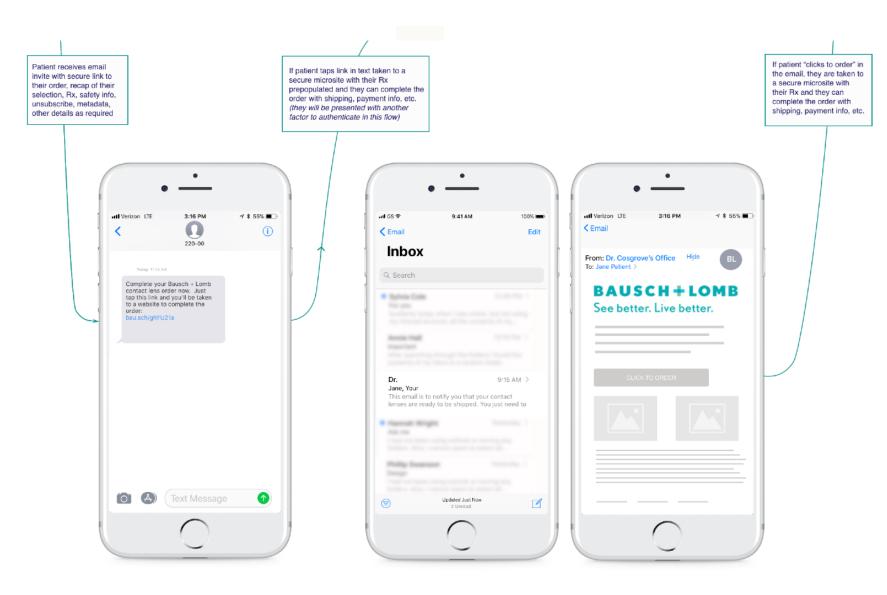
User Journey Detail



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.

logo Username Password Login	BAUSCH - LOMB See better. Live better.
link to patient site	Contact Us Text A- A+
Headline About The Portal Features and Benefits Password	
Go to Pati	ent Site BAUSCH - LOMB
	Go DVe Contact Us Text A- A+
Registration for the Portal	ERS © CONTACT LENSES © MY ACCOUNT
Last name Shipping Account Number Enter User ID Telephone Number (optional) Enter a Password Email	Register Create New Patient Prescribe
Product Callout BAUSCH+LOMB ULTRA® contact ULTRA® contact UNTRA®	Cday lenses incid by the yyof your eyes:
LEGAL NOTICE PRIVACY POLICY CONTACT US SITEMAP BAUSCH + LOMB	
Produ	Interview Interview

High-Fidelity Wireframes non-authenticated home

ECP Login

Login

Username

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

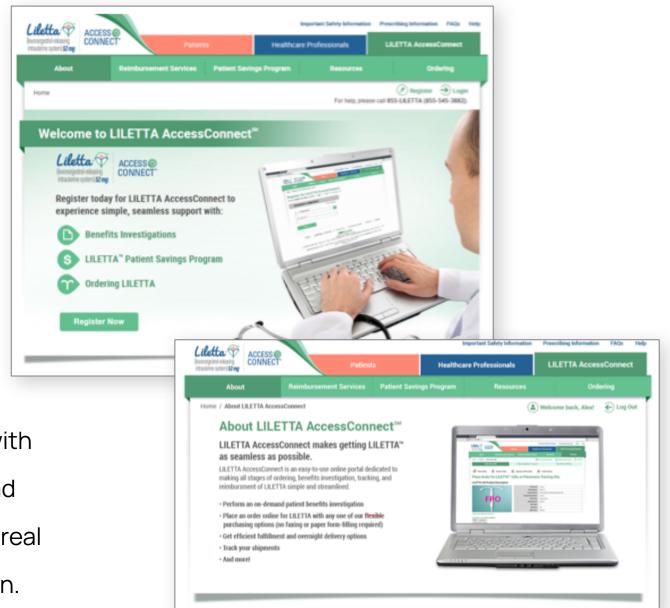
Global tab navigation took up a lot of space at the top of the page and included links to the Patient site, with as many as 3 layers of tabs to get to content



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.

IS		Patient Savings and Resources				
	Home Screen	These 2 sections are distinct from Reimbursement and Ordering in that they are not transactional; they should be presented differently				
	 Present actionable information for logged-in users Provide navigation to the sections avoiding another lev nested horizontal tabs 	 Reimbursement Better understand the capabilities of the system to design a better interface (the test account doesn't give us full access to all passible diaplays) 				
	✓QA properly so that authenticated users do not see ge splash page content					
Des	sign	to all possible displays) Improve form interactions with pre-populated data, predictive typing, field validation				
✓Ens	eate consistency between HCP site and Access Connect sure design elements are strategically implemented to ance to experience	✓Consider linking Patient Information with any EHR or backend system the doctor's office may already have				
✓C us	Expanding the relationship	Ordering				
enh ✔C	 Create a dashboard that tracks orders and key information for users 	 Need to understand how the Ready Stock Program work (currently unavailable) Lead user more directly to Order through VDP with sufficient explanation closer to the order form itself 				
	 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 	 Change process icons to clearly show the user where the are in the sequence of ordering, what steps are complete and what steps are outstanding 				
	 the discount number to increase purchasing habits and interaction Allow users to choose preference in communication- text, call, email 	 Supply product information in a way that does not clutter the ordering user experience 				

User Flows and Sitemap

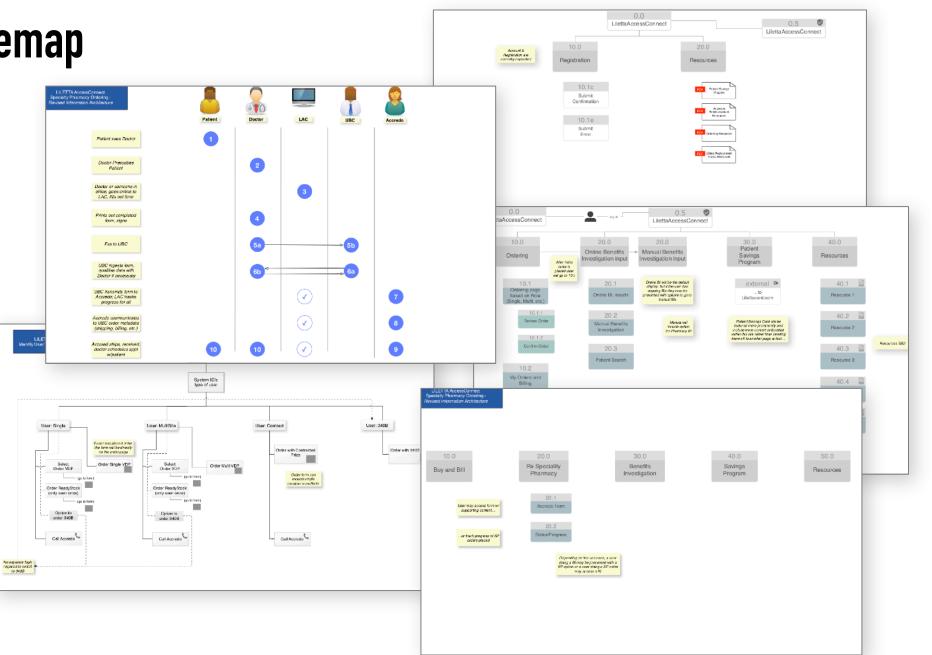
Using swimlane

diagrams, user flows

and sitemaps, we were

able restructure the

content



Wireframes & Functional Specifications

ULETTA AccessConnect > Ordering > Returns, Step 1 of 4

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482010858

248383284 838222883

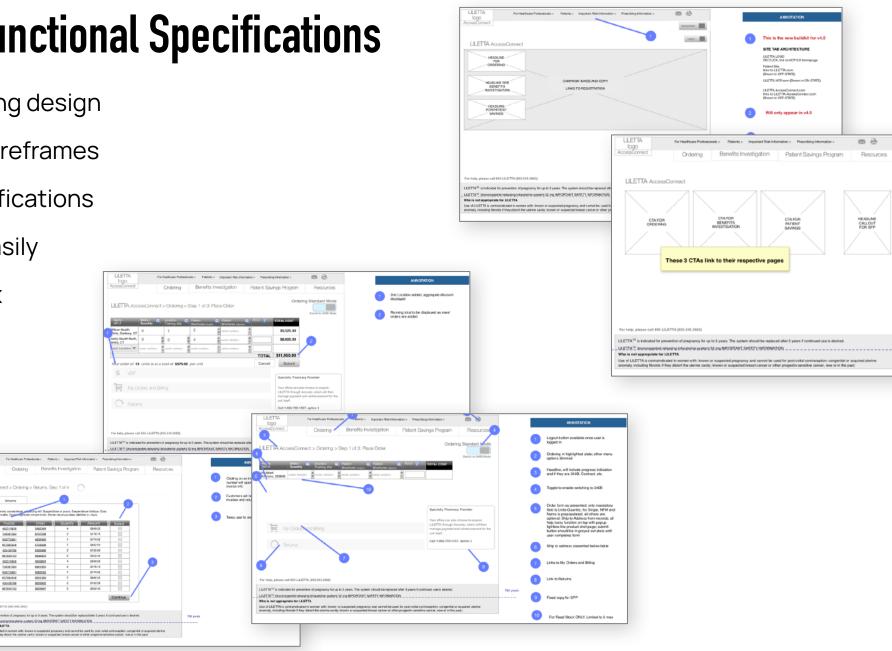
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UTTO The local

AFTS" (expenses beliefs)

he is nell appropriate for LEETTA

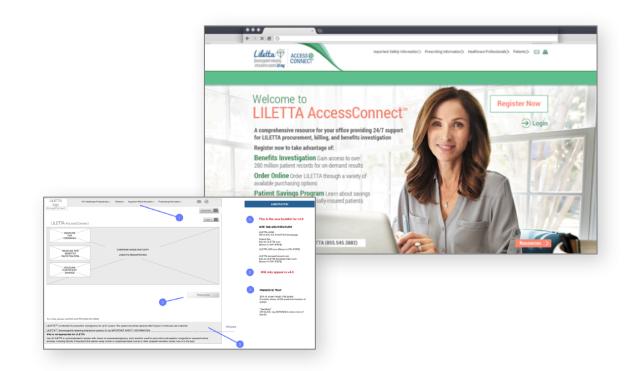
- As Centron was only doing design
- and not development, wireframes
- needed functional specifications
- that developers could easily
- grasp, including complex
- ecommerce pages.

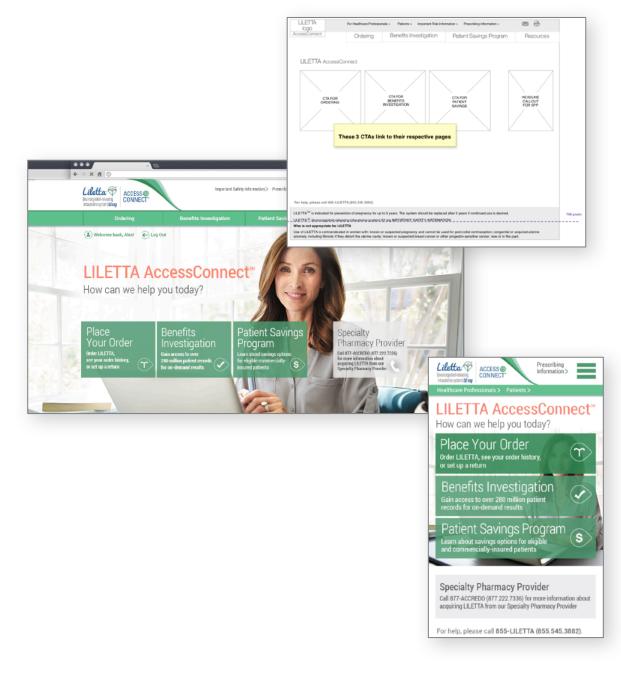


768 pies

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

LILETTA

logo

AccessConnect

NPI #

Wilson Health

Clinic, Danbury, CT

Þ

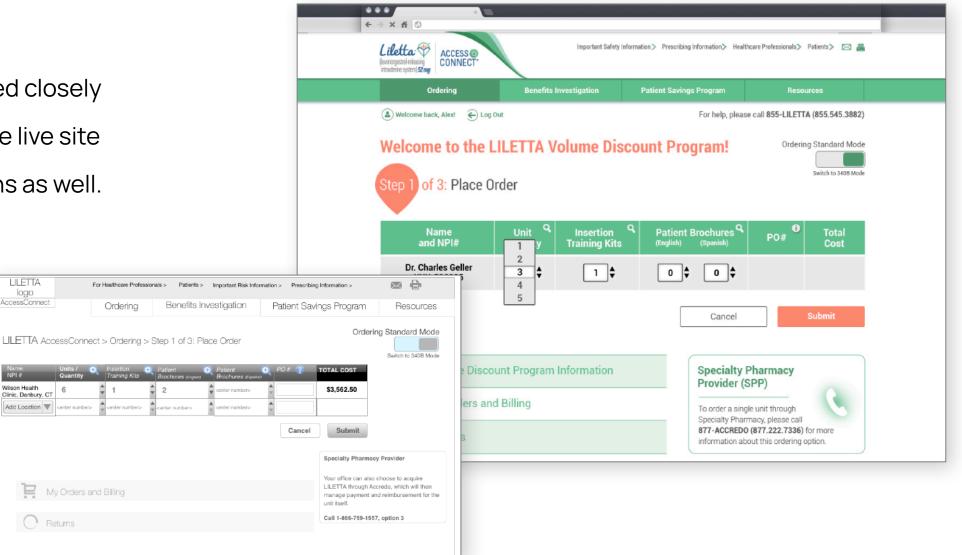
C Returns

6

The Visual Design, hewed closely

to the wireframes for the live site

with ecommerce screens as well.

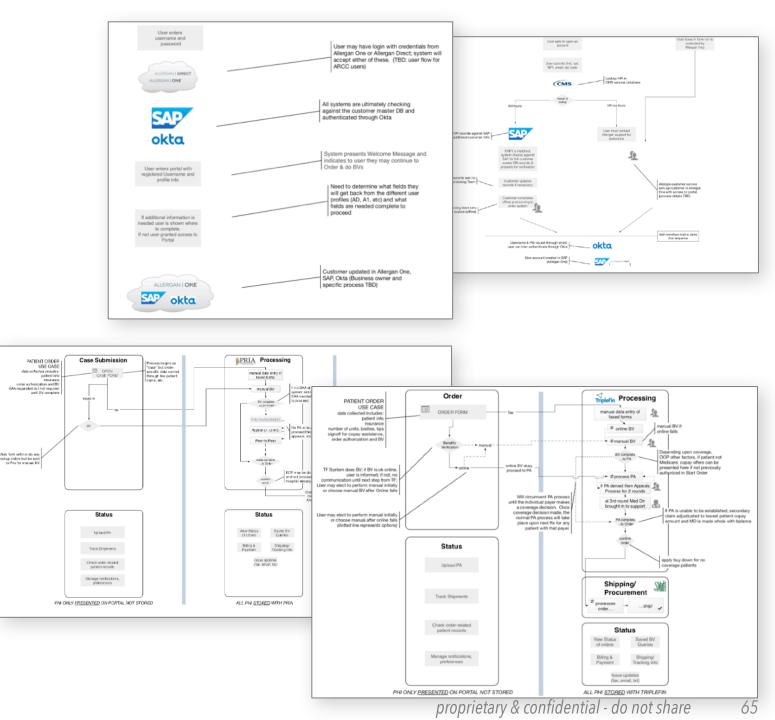


Allergan EyeCue / Centron – FOLLOW–ON ENGAGEMENT

- **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 or 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

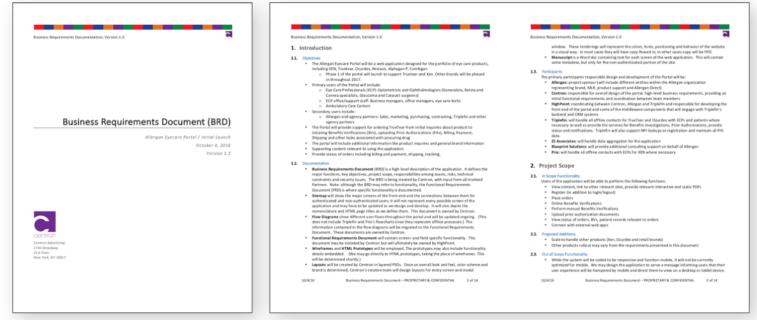
- Complexities of signup and login
- needed to be fully mapped out.
- Allergan's enterprise-authentication
- vendor Okta already had existing subscribers. SAP also handled an ERP function.
- We also needed to document the flow of data through different vendors from initial inquiry for patient benefits 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.



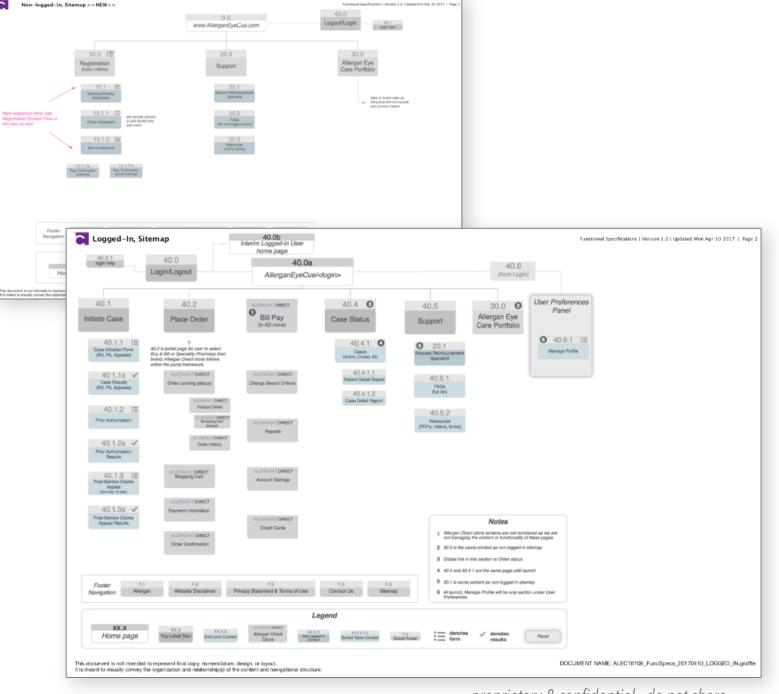
	Field	Required	Form Data (Format)	Туре	Default Values
1	Office Name	Ves	Alphanameric	Opentext	N/A
2	Street Address	Ves	Alphanameric	Opentext N/A	
3	Suite/Bidg#	No Alphanumeric		Opentext N/A	
4	City	Yes	Alpha	Populate from zip	N/N
5	State	Ves	N/A <f can<br="" we="">populate from zip></f>	Dropdown	<2 character state Int TBD>
6	Zip	Yes	N/A <from previous<br="">input if avail></from>	Opentext	From previous input
7	Phone	Yes	Numeric (MRUNULINU) cfrom previous input if avaib	Predictive test	From previous input
8	Extension	No	Numeric	Opentext	N/A
9	Fax	Yes	Numeric (INVERTIGATION OF THE OWNER)	Opentext	N/N
10	Facility name		Alphanumeric	Opentext	N/A
11	Organization NPW	No	Numeric (10 digits)	Opentext	N/A
12	Merchant ID	No	Alphanumeric	Opentext	N/A
13	Best time to contact	No	Dropdown (##:## AN/ PM)	Combo box	AM/PM
14	Products OF Interest	No	Input	Checkbax	TrueTear, Xen, Ourdex, Restassis, Alphagan P, Combigan, Lumigan (01% Refresh
15	I'm interested in	No	Selection	Dropdown	Purchase product, Bill pay
Xя	DME Certified	No	Input	Radio button	Yes, No
/16			enditionally when intensit i ents. Document – PROPRIE		

*	Field	Required	Form Data (Format)	Туре	Default Values
1	Health System/Group Practice Name	No	Alphanumeric	Open text	N/A
2	Street Address	No	Alphanumeric	Open text	N/A
3	Suite/Bldg#	No	Alphanumeric	Open text	N/A
4	City	No	Alpha	Populate from zip	N/A
5	State	No	N/A <if can="" populate<br="" we="">from zig></if>	Dropdown	<2 character state list TBD>
6	Zip	No	N/A «from previous input if avail»	Opentext	From previous input
7	Phane	No	Numeric (###.JWR.####) <from if<br="" input="" previous="">evail></from>	Predictive test	From previous Input
8	Extension	No	Numeric	Open text	N/A
9 10	Fax	No	Numeric (#MLMALETER)	Open text	N/A
	Affiliated or owned	No	Selection	Checkbox	N/A
11	Add other System/ Practice	No	Selection	Dynamic Panel	Present fields to 10
	 Alternate Contact 	(if user activa	tes certain fiekts form bec	ome mandatur,	d

Sitemaps

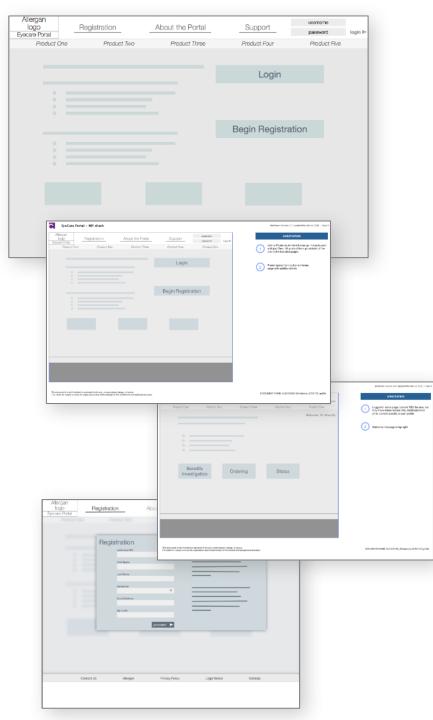
Non-logged-in users (top) and Logged-in users (bottom) had completely different capabilities and functions in the application.

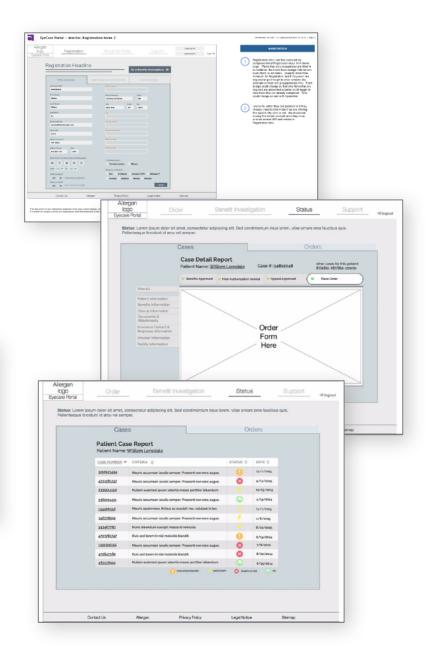
Though mostly representing frontend, the logged-in user sitemap also followed the user flow.



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 dataintensive displays.





Creative Executions

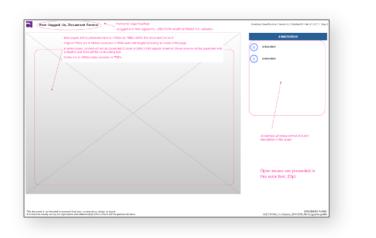
Working closely with visual designers, we put together different approaches for the look and feel that would capably present the data and content.

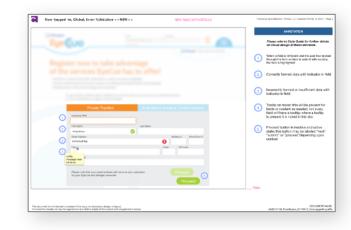




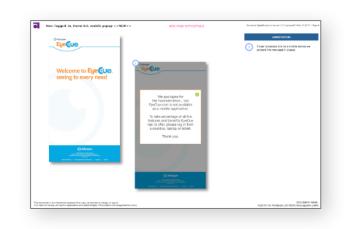
Functional Specifications

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







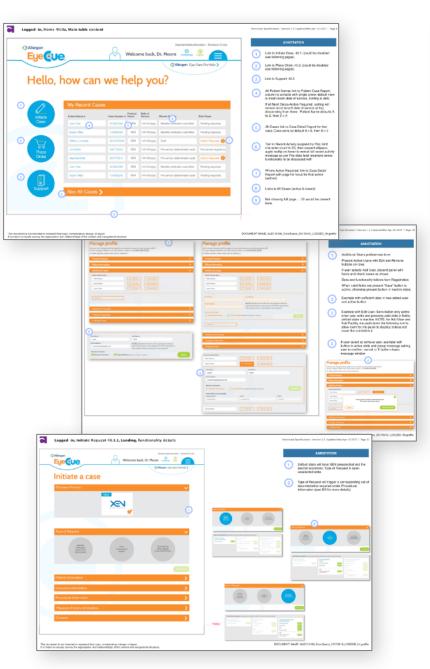


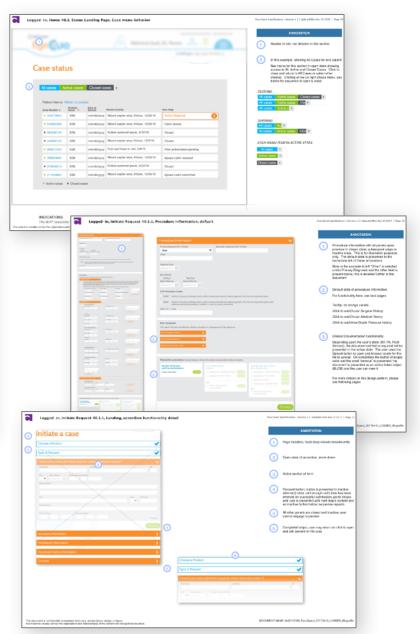




Functional Specifications: data and forms

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

components.

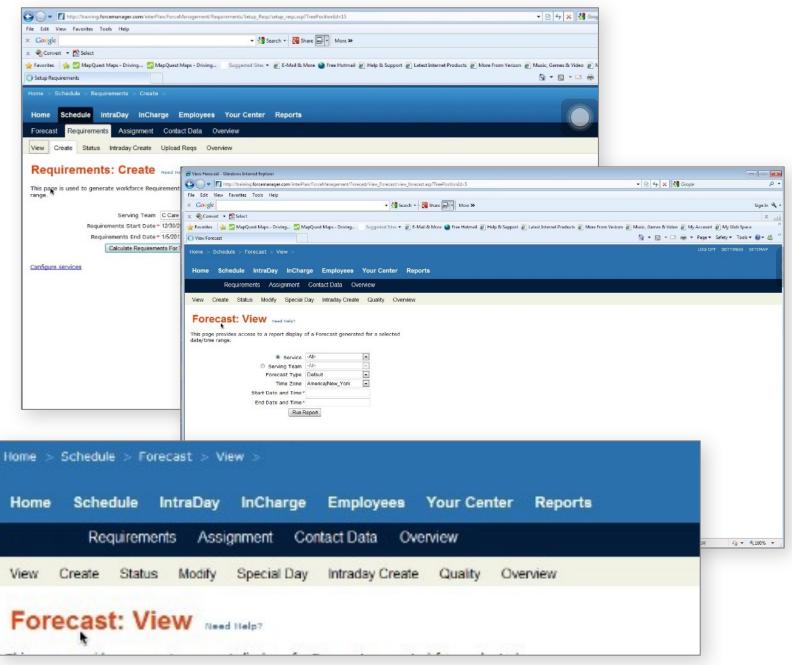
A style guide was the final handoff document to developers, explaining CSS and behaviors for various functions and



- **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

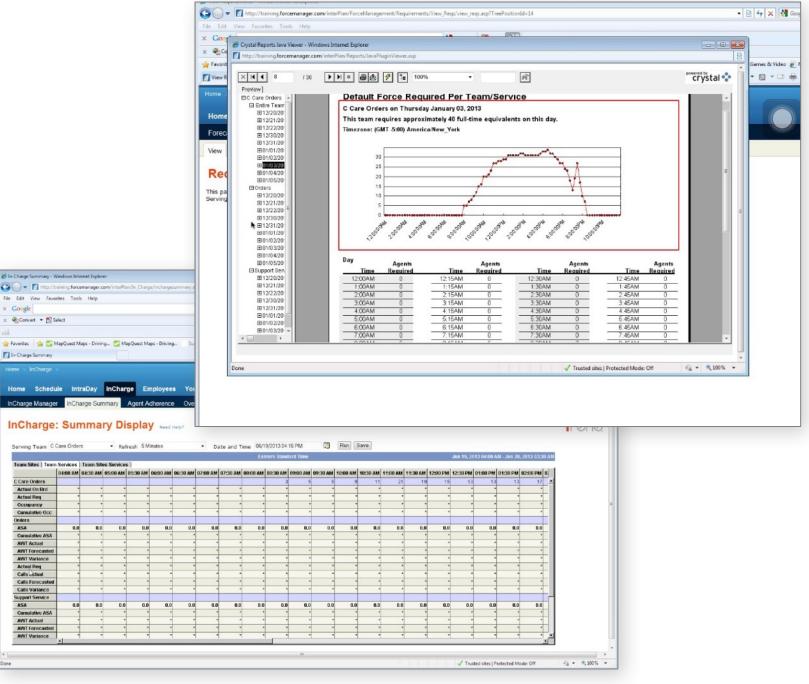
variables) and the system would calculates how to manage the staff allocations.

x Google

Orders ASA

ASA

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

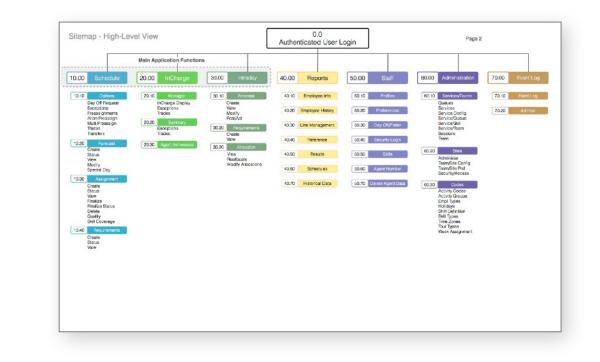
see there were whole sections of the

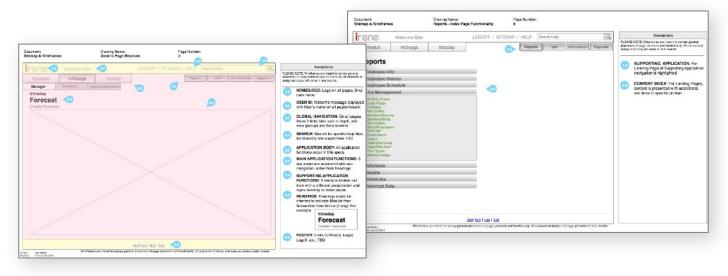
application that people didn't use. I also

reduced the stacked tabs and created a more streamlined information

architecture.

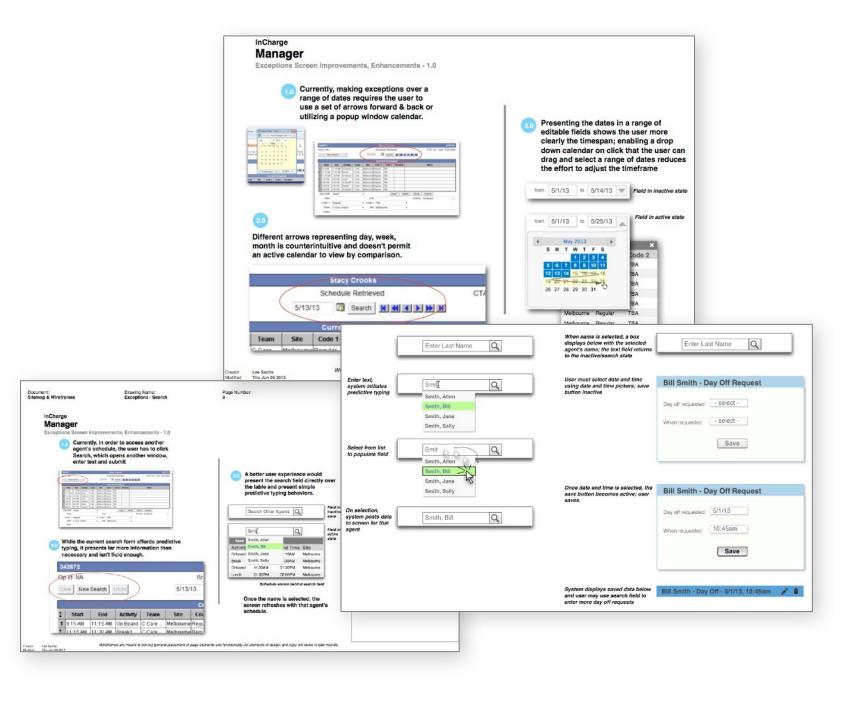
These wires included annotation so developers could understand the global elements and functionality.





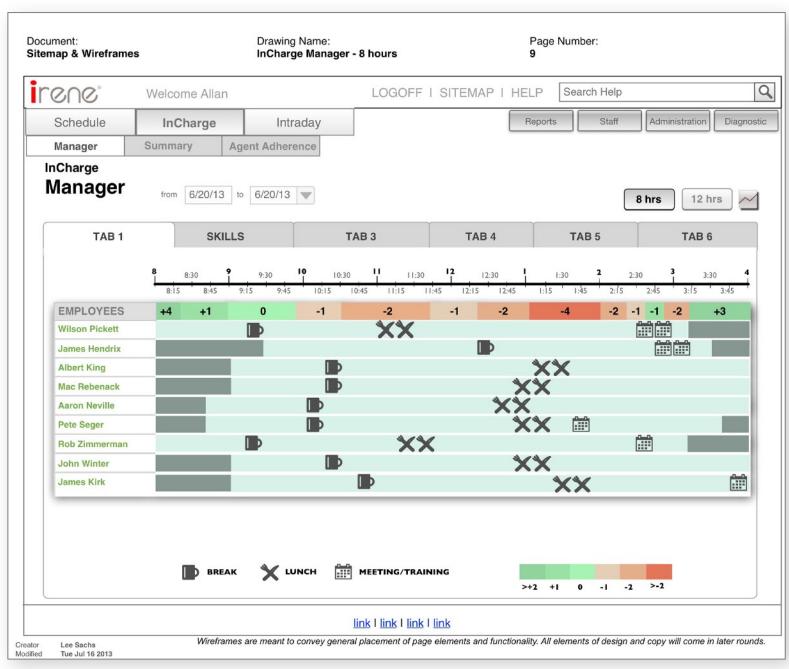
New Web Components

- 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.



A New Vision For The Application

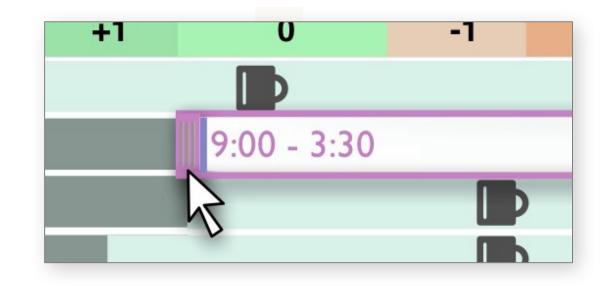
- It was just a matter of taking all of that data and presenting it differently.
- Here the user not only sees the employees and their working time, but clearly sees their breaks and time off.
- Most important, the color scheme alerts the user to critical periods when staffing allocations are down.



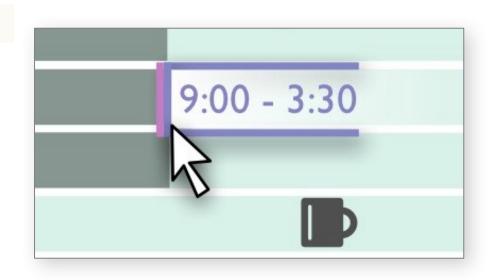
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Drag and Drop Scheduling

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.



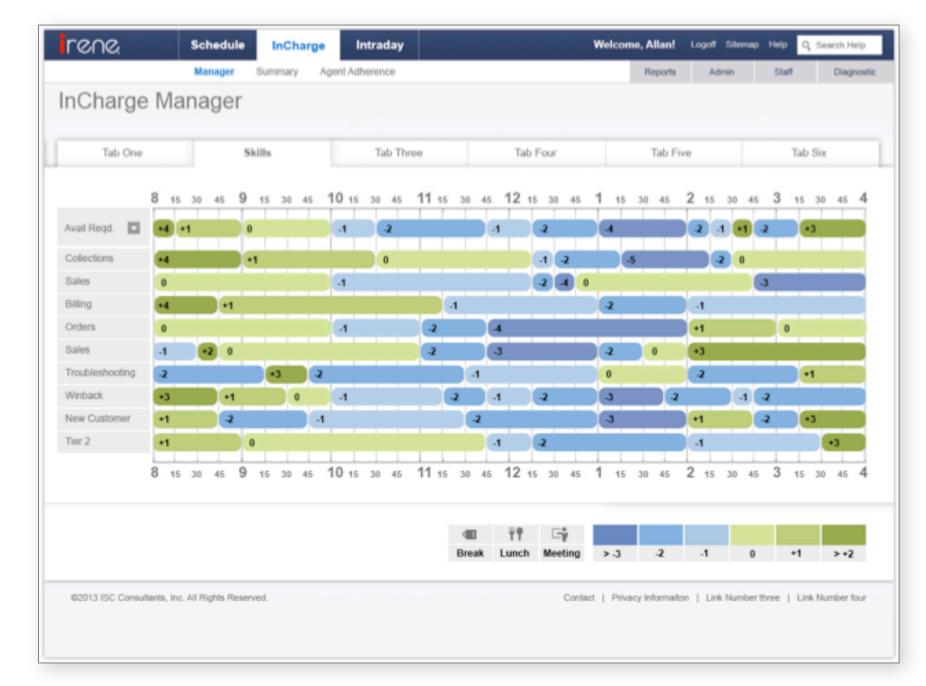
Creative Execution

An example of the

reskinned UI built on the

new vision for the

application



THANK YOU! lee.Sachs@gmail.com 914.720.0292