Kyle Crew

Sample UX/UI Design

("Presentation Manager" for Cotiviti, 2019-2020)

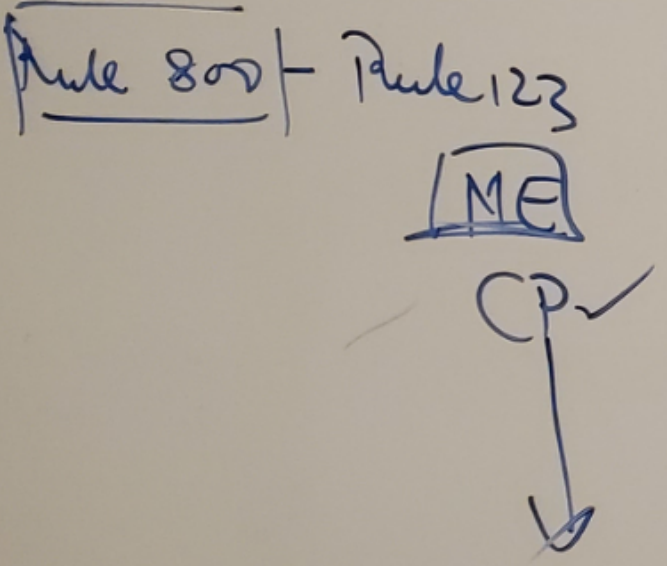**Notation**

[PAYER 1] (DP #10)

The Discovery phase (with iterative User Interviews, "ride-alongs", and data analysis) gives us the pain points we want to target in order to find or improve value for our User.

We identify the essential atomic elements of the workflow, and with a new understanding of the User Environment, set about creating a model for those elements to work together in a meaningful way.

SHOW: ALL ▼
ME
COMPANION
COUNTERPART
OOS

PRIORITY ☐ HI ☐ MED ☐ LO

Rule 800 ─ Rule 123

[ME]
CP ✓

RULE ID #	DP	STATUS	SAVINGS	RELATIONSHIP	Mid-Rule Triad
⚑ ★ RULE 123 X		OPPTY	$350,000	Mutually Exclusive	Cms + Cotiviti → Present
RULE 200	✓	PROD	$	"	
RULE 300	?	PROD	$	"	Cms
RULE 400		OPPTY?	$100,000	"	Cms
⚑ RULE 567		OPPTY	$	COMPANION	Cms + Cotiviti → DNP
" 568		PROD	$	"	
⚑ RULE 567		OPPTY	$	MUTUALLY EXCL.	
" 600		OPPTY	$	"	
" 700		PROD	$	"	

(+/−)

4   800   (ellx) $○   Concept

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Available Opportunities + ◀ New Presentation X | TUFTS December 2019 X | TUFTS March 2020 | **TUFTS September 2019 (Character limit for tabs?) X** ▶

Show: ALL ▼   🔒 FINALIZE ↪

The first challenge was to move our Users away from a spreadsheet model, where much of their day-to-day work was traditionally done.

The collapsible hierachy was a starting point, and survives as an optional view for certain User interactions. From there, we expanded the functionality from a traditional list, and moved much of the text-heavy source material to a graphical, icon or image based interface, simplifying and grouping User tasks logically.

Opportunities (Hierarchy View)

+ ☐ Medical Policy: Evaluation and Management Services (24 DPs in 10 Topics) ☐ Suggested DPs →

− ☐ 🔖 Medical Policy: Maximum Units (24 DPs in 12 Topics) ☐ Suggested DPs →

   + ☐ Topic 1: This Topic (2 DPs) ☐ Suggested DPs →

   + 🔖 ☐ Topic 2: This Topic (3 DPs) ☐ Suggested DPs →   Previous | Next

      #27 ☐ DP LMNOP Priority: High Savings: $80,000 [🟩🟨⬜🟥⬜⬛] 📄 →   Previous | Next

      #28 ☐ DP QRSTW Priority: High Savings: $80,000 [🟩🟨⬜🟥⬜⬛] →   Previous | Next

      #29 ☐ DP RSTUV Priority: High Savings: $80,000 [🟩🟨⬜🟥⬜⬛] →   Previous | Next

   + ☐ Topic 3: This Topic (2 DPs) ☐ Suggested DPs →   Previous | Next

   + ☐ Topic 4: This Topic (3 DPs) ☐ Suggested DPs →   Previous | Next

   + ☐ Topic 5: This Topic (2 DPs) →   Previous | Next

   + ☐ Topic 6: This Topic (3 DPs) →   Previous | Next

   + ☐ Topic 7: This Topic (2 DPs) →   Previous | Next

   + ☐ Topic 8: This Topic (3 DPs) →   Previous | Next

   + ☐ Topic 9: This Topic (1 DPs) →   Previous | Next

   + ☐ Topic 10: This Topic (1 DPs) →   Previous | Next

   + ☐ Topic 11: This Topic (1 DPs) →   Previous | Next

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| Available Opportunities | ➕ | ◀ | New Presentation X | TUFTS December 2019 X | TUFTS March 2020 | **TUFTS September 2019 (Character limit for tabs?) X** | ▶ |

🔽 ⋮⋮ 🔍 ⚙ 🔍 ✏ ❌ 🗄 | Show: [ALL ▼] Expand All Collapse All | Sort by: [Priority ▼] (Reset) | Show: [All ▼] ☐ Select All   🔒 [FINALIZE] ↦

Annotations (red text):
- Filter (Each level of Hierarchy)
- Toggle Heirarchy View
- Search Hierarchy
- Settings
- Search DPs
- Edit (e.g., Locked Presentation)
- Delete
- Archive Presentation
- Limit Capture Type
- Lock Presentation
- Commit to Implementation/Production
- Export Presentation Report

Filters
LOB:
- ALL
- NWPMA
- NWPRI
- TPMA
- TCLMA

LOB:
- ☐ ALL
- ☐ Medicare
- ☐ Medicaid
- ☑ Commercial
- ☐ Dual Eligible
- ☐ Blue Card
- ☐ Federal Employee

Reset Apply

Claim Types
☐ ALL
Professional
- ☑ A
- ☐ F
- ☐ P
Outpatient
- ☑ I
- ☑ O
- ☑ S

🔽 Medical Policy: Evaluation and Management Services (24 DPs in 10 Topics) $$$
▷ Topic: CMS National Coverage... (3 DPs) $ ☐ Suggested DPs

🔽 Topic: Observation Services (5 DPs) $$ ☐ Suggested DPs

DP WXYZ cards:
- DP WXYZ — Priority: HIGH Savings: HIGH $123,000 — MCD MCR COM FED DUA — Last Action 11/09/2018 (45 days old)
- DP WXYZ — Priority: HIGH Savings: HIGH $60,000 — MCD MCR COM FED DUA — Last Action 11/09/2018 (45 days old)
- DP WXYZ — Priority: MED Savings: MED $60,000 — MCD MCR COM FED DUA — Last Action 11/09/2018 (45 days old)
- DP WXYZ — Priority: LOW Savings: LOW $4,000 — MCD MCR COM FED DUA — Last Action 11/09/2018 (45 days old)
- DP WXYZ — MCD MCR COM FED DUA — Last Action 11/09/2018 (45 days old)

Topic: Hemodialysis (3 DPs) $$$ ☐ Suggested DPs

- DP WXYZ — Priority: HIGH Savings: HIGH $123,000 — MCD MCR COM FED DUA — Last Action 11/09/2018 (45 days old)
- DP WXYZ — Priority: MED Savings: MED $60,000 — MCD MCR COM FED DUA — Last Action 11/09/2018 (45 days old)
- DP WXYZ — Priority: LOW Savings: LOW $4,000 — MCD MCR COM FED DUA — Last Action 11/09/2018 (45 days old)

Topic: Topic Name... (14 DPs) $$$ ☐ Suggested DPs

- DP WXYZ — Priority: HIGH Savings: HIGH $122,000 — MCD MCR COM FED DUA — Last Action 11/09/2018 (45 days old)
- DP WXYZ — Priority: MED Savings: MED $60,000 — MCD MCR COM FED DUA — Last Action 11/09/2018 (45 days old)
- DP WXYZ — Priority: LOW Savings: LOW $4,000 — MCD MCR COM FED DUA — Last Action 11/09/2018 (45 days old)
- DP WXYZ — Savings: MED $55,000 — MCD MCR COM FED DUA — Last Action 11/09/2018 (45 days old)
- DP WXYZ — MCD MCR COM FED — Last Action 11/09/2018 (45 days old)

🔽 Opportunities (Hierarchy View)   ⤢

Select Medical Policy/Topic/DP   ➡

- ＋ ☐ ALL
- ＋ ☐ Diagnosis Policy
- ＋ ☐ Ambulance Policy
- ＋ ☐ Bundled Services Policy
- − ☐ Evaluation and Management Services Policy
  - ＋ ☐ Observation Services
  - ＋ ☐ Hemodialsys
  - − ☐ CMS National Coverage
    - ☐ [23] DP 12345
    - ☐ [24] DP 23456
    - ☐ [25] DP 34587
- ＋ ☐ Diagnosis Code Guideline Policy
- ＋ ☐ Maximum Units Policy
- ＋ ☐ Durable Medical Equipment and Suppies Policy

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Available Opportunities ➕ ◀ | New Presentation X | TUFTS December 2019 X | TUFTS March 2020 | **TUFTS September 2019 (Character limit for tabs?)** X ▶

Show: ALL ▼　Expand All　Collapse All　|　Sort by: Priority ▼　(Reset)　|　Show: All ▼　|　☐ Select All　　🔒 **FINALIZE**

Payer/LOB　　　　　Reset　Apply

Payers
- ☑ ALL
- ☑ NWHMA
- ☑ NWHRI
- ☑ T1PMA
- ☑ TCLMA

LOB
- ☐ ALL
- ☐ Medicare
- ☐ Medicaid
- ☑ Commercial
- ☐ Dual Eligible

Claim Types
- ☐ ALL
- Professional
- ☑ A
- ☐ F
- ☐ P

> Having gained User feedback and approval through iterative User dialogue, we took the next step, breaking out of the "list view" or "spreadsheet" model into a more graphical "card" model, which proved more flexible for the ordering and assigning functions.
>
> Here the cards for "Decision Points" (DPs) are presented in a collapsible hierarchy, ready for assignment to various presentations.
>
> The more or less traditional tool panels on the left are themselves collapsible to provide more work area for the DP cards.

Oppor...

Select M...

- ＋ ☐
- ＋ ☐ Diagnosis Policy
- ＋ ☐ Ambulance Policy
- ＋ ☐ Bundled Services Policy
- － ☐ Evaluation and Management Services Policy
  - ＋ ☐ Observation Services
  - ＋ ☐ Hemodialisys
  - － ☐ CMS National Coverage
    - ☐ [23] DP 12345
    - ☐ [24] DP 23456
    - ☐ [25] DP 34567
- ＋ ☐ Diagnosis Code Guideline Policy
- ＋ ☐ Maximum Units Policy
- ＋ ☐ Durable Medical Equipment and Suppies Policy

▽ Medical Policy: Evaluation and Management Services　(24 DPs in 10 Topics)　$$$ BR HS

▷ Topic: CMS National Coverage...　(3 DPs)　$ CR　☐ Suggested DPs ➡

▽ Topic: Observation Services　(5 DPs)　$$ CR HS　☐ Suggested DPs ➡

☐ DP WXYZ 🚩 ➡	☐ DP WXYZ 3 to do ➡	☐ DP WXYZ 3/12 ➡	☐ DP WXYZ 3/12 ➡	☐ DP WXYZ 3/12 ➡
Priority: HIGH Savings: HIGH	Priority: HIGH Savings: HIGH	Priority: MED Savings: MED	Priority: LOW Savings: LOW	Priority: --- Savings: MED
CR BR CS HS $123,000	CR BR CS HS $80,000	CR BR CS HS $55,000	CR BR CS HS $4,000	CR BR CS HS $55,000
MCD MCR▲ COM FED BLU DUA▼	MCD▲ MCR▼ COM▲ FED BLU DUA	MCD MCR▲ COM FED BLU DUA▼	MCD MCR▲ COM FED BLU△ DUA▼	MCD MCR▲ COM FED BLU△ DUA▼
Last Action 11/09/2018 (45 days old)	Last Action 11/09/2018 (45 days old)	Last Action 11/09/2018 (45 days old)	Last Action 11/09/2018 (45 days old)	Last Action 11/09/2018 (45 days old)

Topic: Hemodialysis　(3 DPs)　$$$ CR HS　☐ Suggested DPs ➡

☐ DP WXYZ 3 to do ➡	☐ DP WXYZ 3/12 ➡	☐ DP WXYZ 3/12 ➡
Priority: HIGH Savings: HIGH	Priority: MED Savings: MED	Priority: LOW Savings: LOW
CR BR CS HS $123,000	CR BR CS HS $55,000	CR BR CS HS $4,000
MCD MCR▲ COM FED BLU△ DUA▼	MCD MCR▲ COM FED BLU DUA▼	MCD MCR▲ COM FED BLU△ DUA▼
Last Action 11/09/2018 (45 days old)	Last Action 11/09/2018 (45 days old)	Last Action 11/09/2018 (45 days old)

Topic: Topic Name...　(14 DPs)　$$ CR HS　☐ Suggested DPs ➡

☐ DP WXYZ 3 to do ➡	☐ DP WXYZ 3/12 ➡	☐ DP WXYZ 3/12 ➡	☐ DP WXYZ 3/12 ➡	☐ DP WXYZ 3/12 ➡	☐ DP WXYZ 3/12 ➡
Priority: HIGH Savings: HIGH	Priority: MED Savings: MED	Priority: LOW Savings: LOW	Priority: --- Savings: MED	Priority: LOW Savings: LOW	Priority: --- Savings: MED
CR BR CS HS $123,000	CR BR CS HS $55,000	CR BR CS HS $4,000	CR BR CS HS $55,000	CR BR CS HS $4,000	CR BR CS HS $55,000
MCD MCR▲ COM FED BLU DUA▼	MCD MCR▲ COM FED BLU DUA▼	MCD MCR▲ COM FED BLU△ DUA▼	MCD MCR▲ COM FED BLU△ DUA▼	MCD MCR▲ COM FED BLU△ DUA▼	MCD MCR▲ COM FED BLU△ DUA▼
Last Action 11/09/2018 (45 days old)	Last Action 11/09/2018 (45 days old)	Last Action 11/09/2018 (45 days old)	Last Action 11/09/2018 (45 days old)	Last Action 11/09/2018 (45 days old)	Last Action 11/09/2018 (45 days old)

☐ DP WXYZ 3 to do ➡	☐ DP WXYZ 3/12 ➡	☐ DP WXYZ 3/12 ➡	☐ DP WXYZ 3/12 ➡	☐ DP WXYZ 3/12 ➡

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Available Opportunities ⊕ ◀ New Presentation X | TUFTS ... 2019 (Character limit for tabs?) X ▶

Show: ALL ▼

🔒 FINALIZE

Once the Decision Points are collected into a Presentation, the User is ready for the Client Meeting, where decisions are captured at a granular level.

Here we designed a DP Detail View with the ability to capture fine-grained decisions at any level of the data/decision hierarchy.

▼ Payer/LOB

Reset | Apply

Payers
- ☑ ALL
- ☑ NWHMA
- ☑ NWHRI
- ☑ T1PMA
- ☑ TCLMA

LOB
- ☐ ALL
- ☐ Medicare
- ☐ Medicaid
- ☑ Commercial
- ☐ Dual Eligible
- ☐ Blue Card
- ☐ Federal Employee

Claim Types
- ☐ ALL
- Professional
- ☑ A
- ☐ F
- ☐ P
- Outpatient
- ☑ I
- ☐ O
- ☑ S

▼ Opportunities (Hierarchy View)

Select Medical Policy/Topic/DP

- ＋ ☐ ALL
- ＋ ☐ Diagnosis Policy
- ＋ ☐ Ambulance Policy
- ＋ ☐ Bundled Services Policy
- － ☐ Evaluation and Management Services Policy
  - ＋ ☐ Observation Services
  - ＋ ☐ Hemodialisys
  - － ☐ CMS National Coverage
    - ☐ 23 DP 12345
    - ☐ 24 DP 23456
    - ☐ 25 DP 34567
- ＋ ☐ Diagnosis Code Guideline Policy
- ＋ ☐ Maximum Units Policy
- ＋ ☐ Durable Medical Equipment and Suppies Policy

#1 | ☐ DP 10699 → | Priority: High BR/CR | Savings: $80,000 | MCD MCR COM FED BLU DUA | Assigned: 06/06/2019 | Previous | Next | X

Description
Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis

Notes
Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum

☐ ALL	☐ Commercial	☐ Blue Card	☐ Fed Employee
☐ WELBC [A]	☐ Approve August 13, 2017	☐ Reject August 13, 2017	☐ Approve w/Mods (02) August 13, 2017
☐ WELBC [I]	☐	☐	☐
☐ WELBC [S]	☐	☐	N/A
☐ WELEX [A]	☐	☐ Approve w/Mods (01) August 13, 2017	☐
☐ WELEX [I]	☐	☐	☐
☐ WELEX [S]	☐	☐	☐
☐ WELFE [A]	☐	☐	☐
☐ WELFE [I]	☐	☐	☐
☐ WELFE [S]	☐	☐	☐
☐ WELIA [A]	☐	☐	☐
☐ WELIA [I]	☐	☐	☐
☐ WELIA [S]	☐	☐	☐

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The actual captures are, in themselves, quite detailed, with a great variety of detail and data that must be considered for implementation downstream, and for reporting throughout the lifecycle.

The design here allows for quick capture and re-organizes previously difficult to gather data.

CPW | CPQ

📦 Available Opportunities ➕ ◀ New Presentation | TUFTS September 2019 (Character limit for tabs?) X ▶

Show: ALL ▼ 🔒 FINALIZE

▼ Payer/LOB   Reset   Apply

Payers
- ☑ ALL
- ☑ NWHMA
- ☑ NWHRI
- ☑ T1PMA
- ☑ TCLMA

LOB
- ☐ ALL
- ☐ Medicare
- ☐ Medicaid
- ☑ Commercial
- ☐ Dual Eligible
- ☐ Blue Card
- ☐ Federal Employee

Claim Types
- ☐ ALL

Professional
- ☑ A
- ☐ F
- ☐ P

Outpatient
- ☑ I
- ☐ O
- ☑ S

▼ Opportunities (Hierarchy View) ⤢

Select Medical Policy/Topic/DP ➡

- ＋ ☐ ALL
- ＋ ☐ Diagnosis Policy
- ＋ ☐ Ambulance Policy
- ＋ ☐ Bundled Services Policy
- － ☐ Evaluation and Management Services Policy
  - ＋ ☐ Observation Services
  - ＋ ☐ Hemodialsys
  - － ☐ CMS National Coverage
    - ☐ 23 DP 12345
    - ☐ 24 DP 23456
    - ☐ 25 DP 34567
- ＋ ☐ Diagnosis Code Guideline Policy
- ＋ ☐ Maximum Units Policy
- ＋ ☐ Durable Medical Equipment and Suppies Policy

#1 ☐ DP 10699 ➡

Description

Lorem ipsum dolor sit amet, consect nonummy nibh euismod tincidunt u volutpat. Ut wisi enim ad minim veni mcorper suscipit lobortis nisl ut aliqu

☐ ALL	☐
☐ WELBC [A] 🔖	☐
☐ WELBC [I]	☐
☐ WELBC [S] 🔖	☐
☐ WELEX [A]	☐
☐ WELEX [I]	☐
☐ WELEX [S]	☐
☐ WELFE [A] 🔖	☐
☐ WELFE [I]	☐
☐ WELFE [S]	☐
☐ WELIA [A]	☐
☐ WELIA [I]	☐
☐ WELIA [S]	☐

Capture Decision for [This Target Medical Policy/Topic/DP/Opportunity]   X

- ○ Approve
- ◉ Approve with Mods
- ○ Reject
- ○ Defer
- ○ Follow Up
- ○ Re-Assign
- ○ Unassign

Environment   ☐ Test Only

Processing Date   From: 01/01/1753 🔲   To: 12/31/9999 🔲

Date of Service   From: 01/01/1753 🔲   To: 12/31/9999 🔲

Modifications   Expand All | Collapse All

▼ ☑ **Deny vs Recode**

Cotiviti Reason Code (Optional)
ABCD

▼ **CPT/HCSPC Code(s)**

☑ Add CPT Code(s)

1234, 1235, 1236, 1237, 1238, 1239, 1240, 1241, 1242, 1233, 1244, 1245, 1246, 1247, 1248, 1249, 1250, XXXX,

☑ Remove CPT Code(s)

2234, 2235, 2236, 2237, 2238, 2239,2240, 2241, 2242, 2233,2244, 2245, 2246, 2247, 2248, 2249, 2250, XXXX,

☐ Replace (Attachment of codes will accompany configuration request.)

▶ **ICD Code(s)**

▼ **Cotiviti Reason Code Change**
WXYZ

▶ **Overrides**

▶ **Age (Min)**

▶ **Age (Max)**

3210 characters remaining of 4000 character limit.

Capture   Cancel