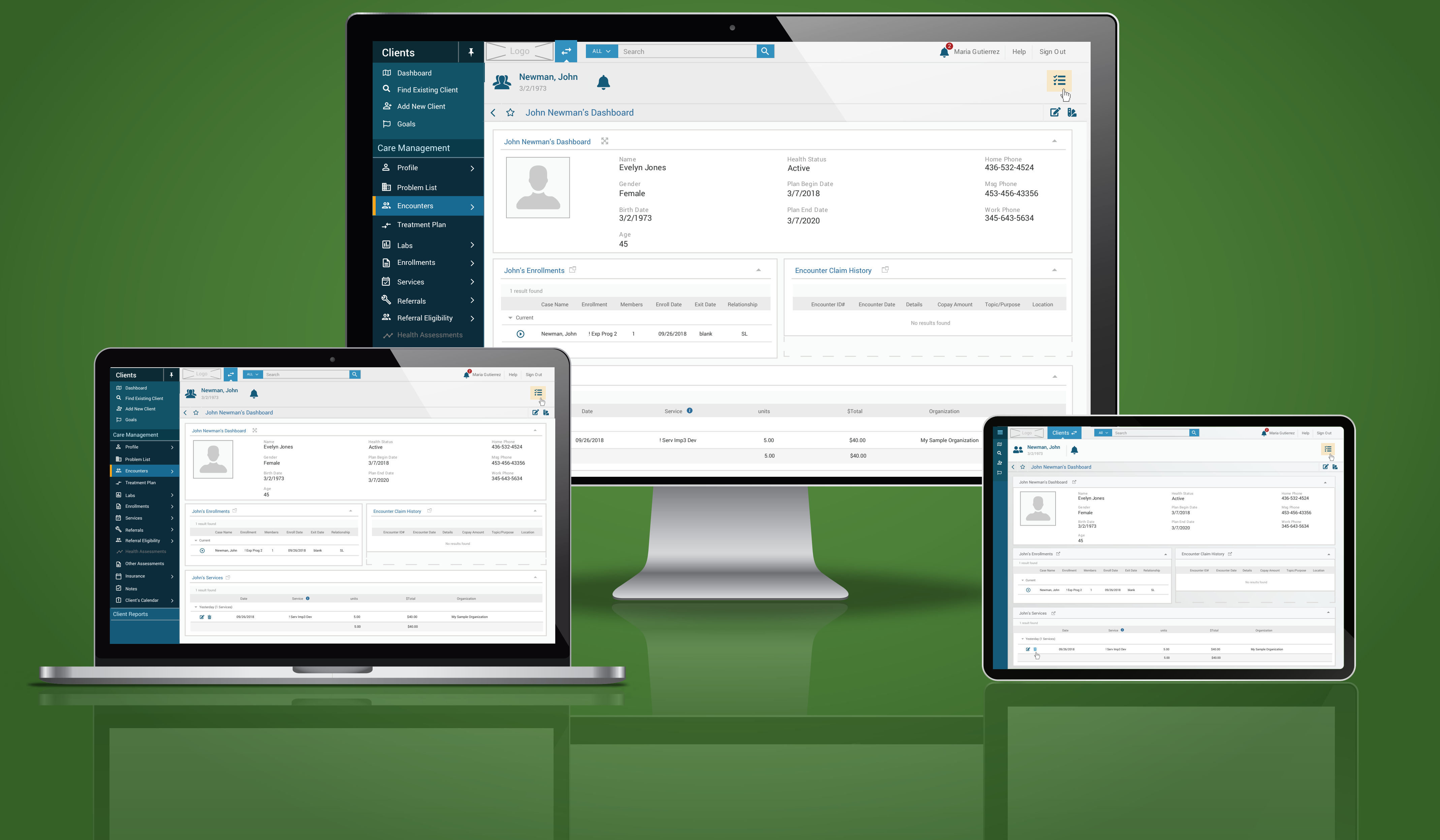


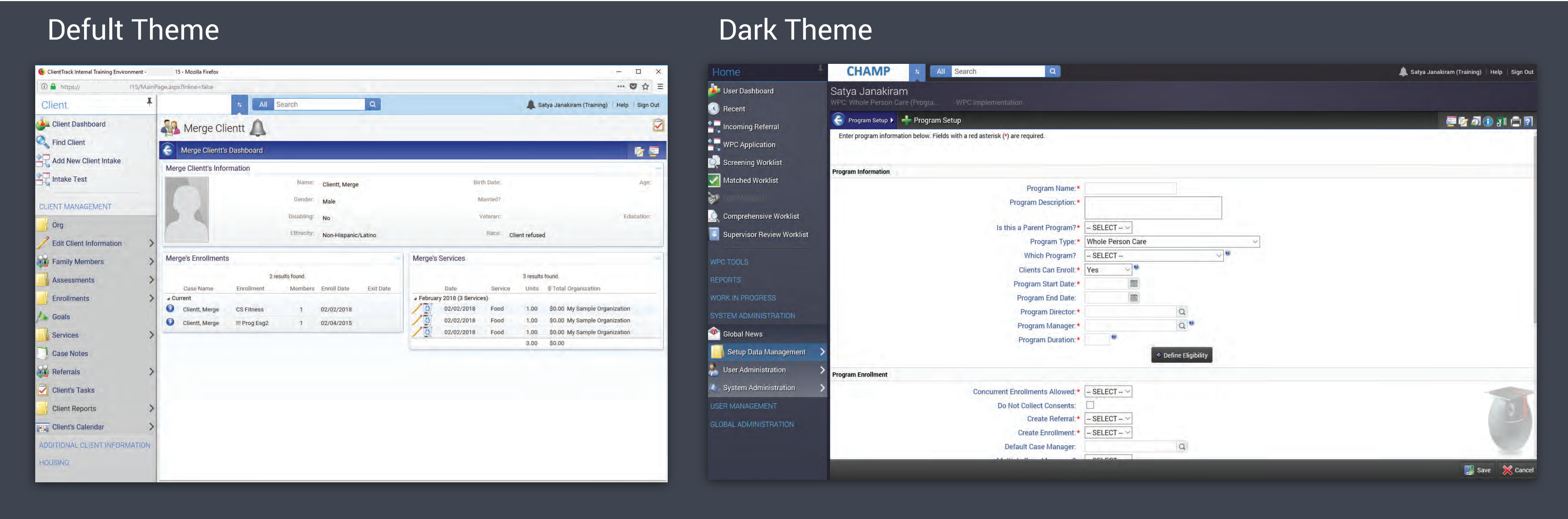
CLIENTTRACK REDESIGN PROJECT



SUMMARY

In 2016, Eccovia started losing customers due to the old look and feel and poor user experience. Eccovia Solutions made a decision to update the user interface with modern flat look with better User Experience. And to make the User Interface Responsive for Mobile Device.

OLD USER INTERFACE



CHALLENGES

1. The existing customers did not wanted to loose the colored icons. But without changing the image icons to Font Icons the enhancement could not happen.
2. The UI was not compatible with Mobile interface. Need to be responsive for all user groups.

SOLUTION

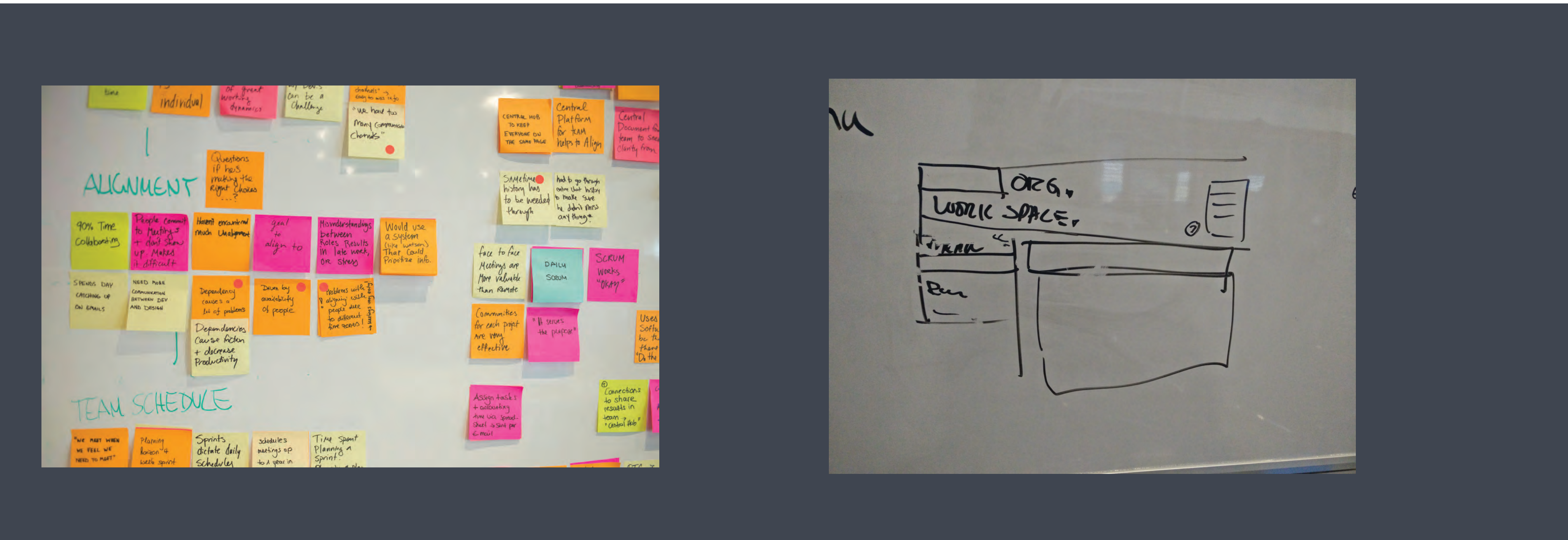
With Client ID, the image Icons can display only for the users who would like to see the colored icons, the rest of the clients will have the flat look monochromatic font-icons. The logic was built inside the application to make the switch happen. And the UI was updated with Bootstrap framework to be responsive.

USER RESEARCH METHODS

Identified Users and grouped users in 3 categories:

- 1. Admin User
- 2. Power user
- 3. End User

CARD SORTING & SKETCHES



USER INTERVIEWS, OBSERVATIONS & HEURISTIC EVALUATION

User Interview Questionnaire

Heuristic Evaluation

General User Interview Questions

We are asking the following questions to better understand our users and how we the solution. You can skip any question that you would prefer not to answer.

Your Name: [Redacted]

Your Position: Not Completed

Workgroup: SPA Lead

Work-Related Questions

Your answers to these questions will help us better understand how you work.

- What time do you generally start and end work?
See paperwork
- Does your work shift vary day to day?
See paperwork
- What does a typical day look like?
Come in, see if clients have been entered. Determine their eligibility. This is a process. Combine the determine eligible and enrollment. Need to see information on the form like citizenship status.
- What motivates you to come to work and help other people?
Satisfaction of providing services to the homeless population and making a difference.

Case Notes - Print Selected (view and print Selected)

Tom [Redacted] CLIENT ID [Redacted]

Client Case Notes

Case notes for the selected client are displayed below. To preview and/or print case notes, check the Print checkbox next to one or more case notes and press the Print Selected button.

Type: --SELECT--
Approval: --SELECT--

2 results found.

Date	Type	Note Type	Note Sub Type	Subject	Approval	Created By	Last Updated By	Print
10/3/2017	1000000003							<input type="checkbox"/>
10/3/2017	1000000003							<input type="checkbox"/>

Issue:
- Users would like to view all the selected case notes before printing.
- Users doesn't know that the functionality exists in the application.

Steps:
10 Select all or individual case notes
Click the Print Selected button view all selected case notes and print if needed.

Proposal:
The solution:
1. Immediate solution is to change the button label from Print Selected to "View & print Selected"
11 Add a Find/Search Feature

PERSONAS

Alisha W

"Motivated by the possibility that change is possible"

Occupation: Program Manager, Short Term Programs
Workgroup: Program Manager
Sector: Care Coordination
Location: Los Angeles, CA
Language: Polite

Popular Keywords
TRAINING
HEALTH
MENTAL HISTORY
ELIGIBILITY
REPORT
COMMUNICATIONS

CHAMP Features Awareness:
Support Workspace: NO
Notifications: NO
Task Functionality: NO

Bio:
W is Program Manager, Short Term Programs working LA County. Work with 70 HFH clients on a regular basis. The biggest challenge which Denice is facing on a regular basis is there are not enough housing stock in the County for our participants. The primary goal is to serve to the participants enrolled in emergency services and to be objective and open-minded.

Goals
To serve to the participants enrolled in emergency services
To be objective and openminded.

Frustrations
Waiting for the data to load
It would be helpful if individual program report could be generated
The outreach workers(providers) who have access to CHAMP enroll the clients with less information
Constantly hiring NEEDS Training for new hires

Need Improvement
Historical Data missing in the system
Need an icon on Dashboard portlet to expand (Open Page)
Needed information is provided by the referring party like

Technology:
IT and Internet
Using Software
Using Mobile Apps
Learning New Tech

Devices & Platform
LG
Android
Apple

Preferred Browser
chrome

Harry P

"For interim housing, to get someone into a safe place by that day"

Occupation: CBEST SPA Lead
Workgroup: CBEST SPA Lead
Sector: Care Coordination
Location: Los Angeles, CA
Language: Polite

User Experience Goals
ORGANIZED
INTUITIVE
RESPONSIVE
SECURE DATA
USEFUL
PRIVACY
FUNCTIONAL

Automate
Auto-generate a report of data quality monthly
Access to reporting
Review the reports created by HFH for data quality
Access to Clients documents from Dashboard

Goals
Prioritize the clients based on the urgency.
Client Dashboard - Determine Eligibility
Data Explorer - Pull Monthly Report

Frustrations
New User- Duplicate Clients - Permission to Edit and Delete as Program Manager if there are duplicate records.
Navigation - Locate the clients. Use Find Clients.
When doing client application, Distinction between Docs and Files.

Need Improvement
Automated letters (Templates) Generate a Introductory letter for the client.
Case manager - Print and handover to the client.

Technology:
IT and Internet
Using Software
Using Mobile Apps
Learning New Tech

Devices & Platform
Apple
Android

Preferred Browser
Firefox/Chrome

USER RESEARCH

Planned the UI/UX upgrade to 4 different phases:

Phase I -

- 1. User Interface Refresh - Re-skin.
- 2. Update Icons from Image to Font-icon.
- 3. Update margin, paddings and made some minor changes to make it a clean layout with CSS but without touching the HTML/JavaScript

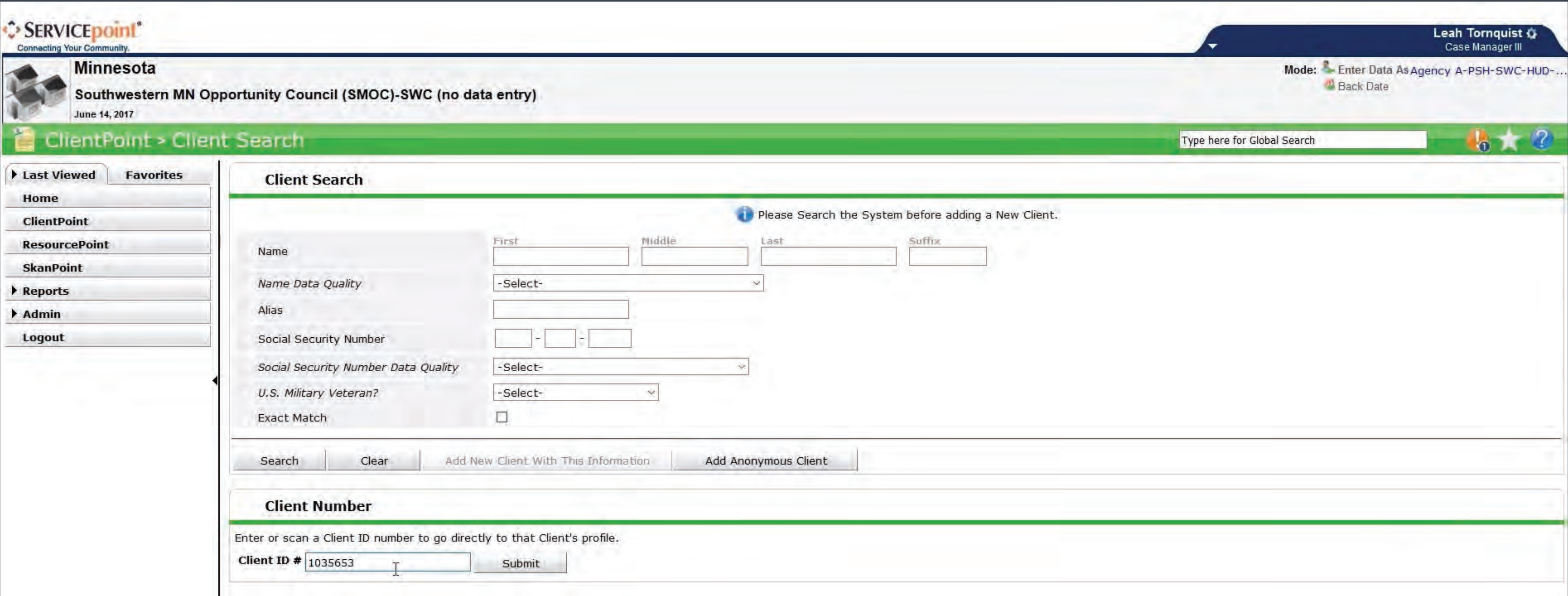
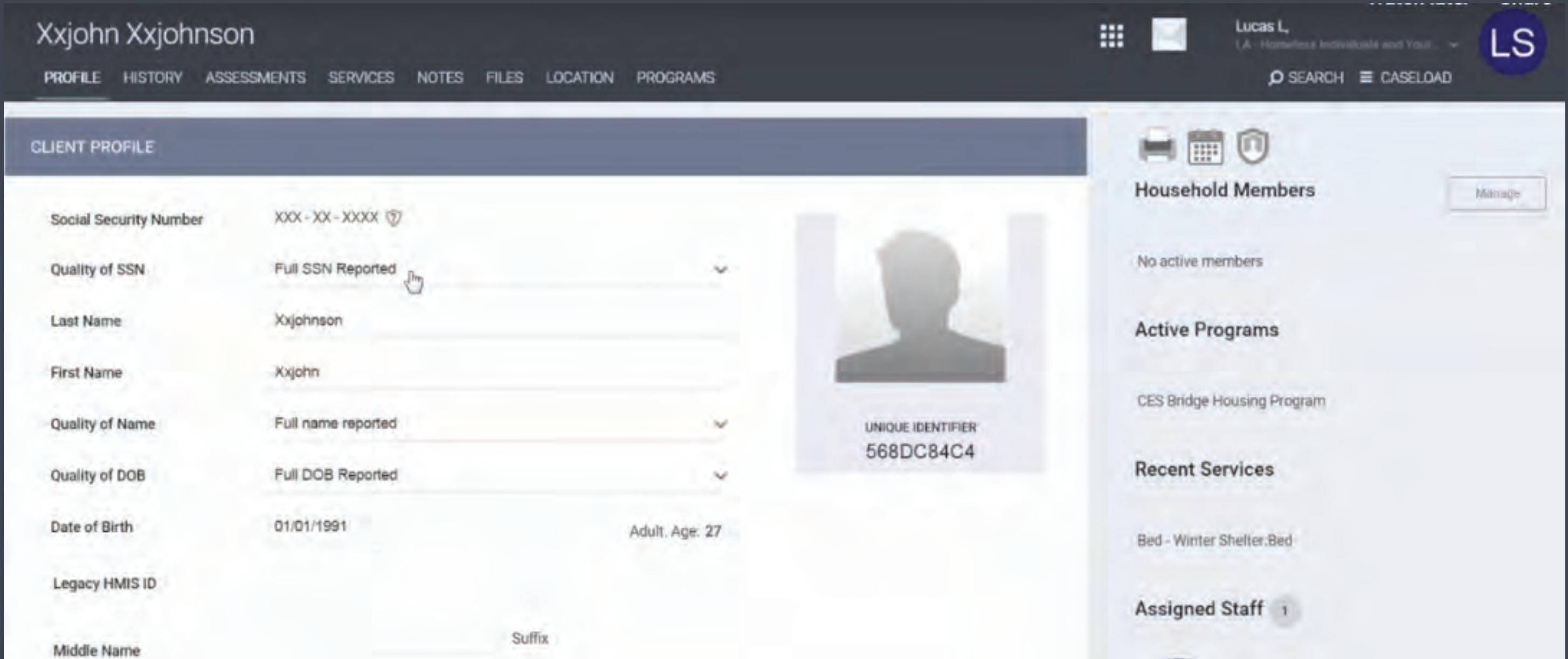
Phase II: Navigation

Phase III: Forms and Multi-Edit Tables

Phase IV: Tools, Reporting Dashboard & IOS / Android app

Focus Groups - Recruited Internal and External Clients for review and feedback.

Comparative Analysis: Competitors design and look and feel.



Design Phase:

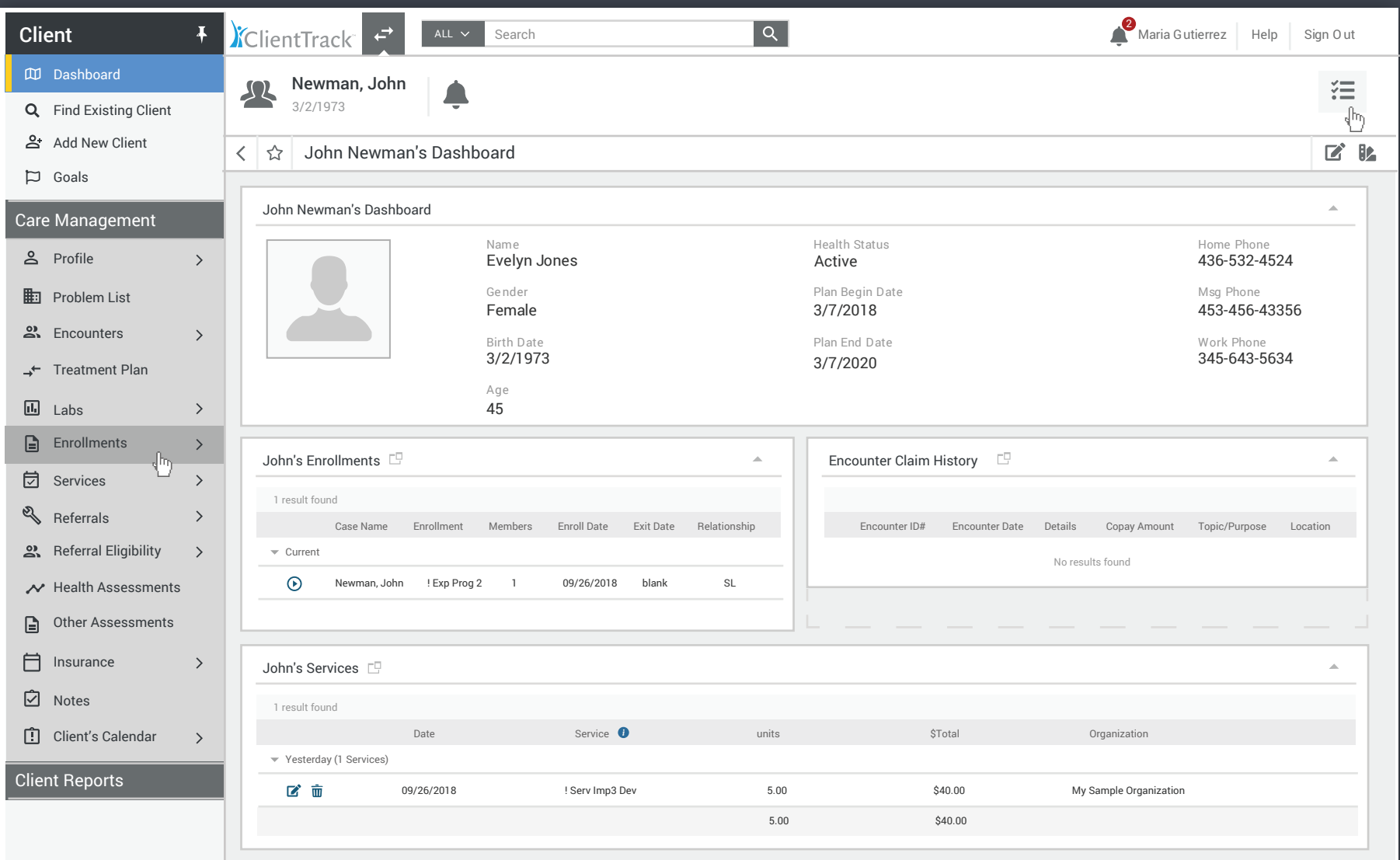
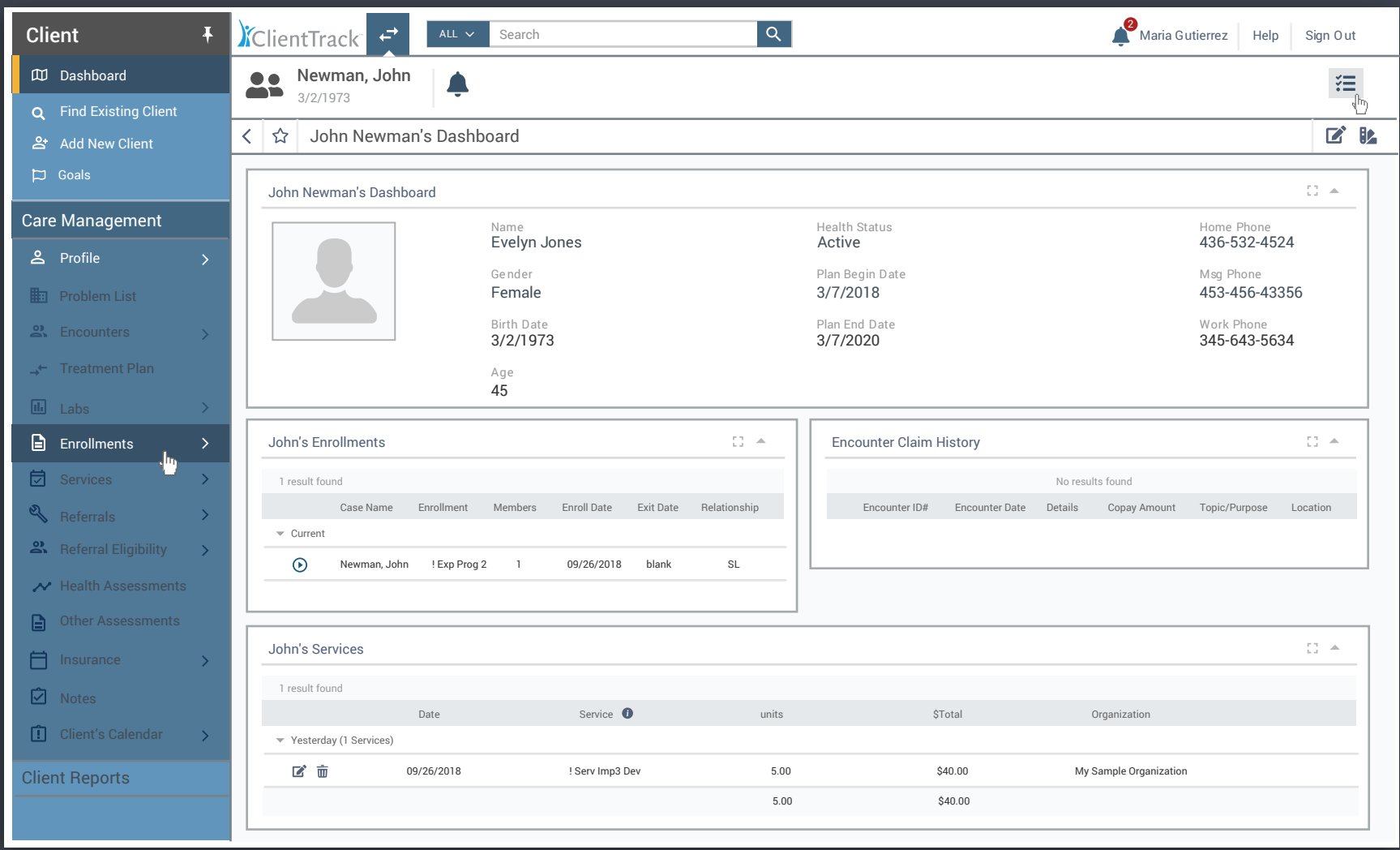
Color Palette:

FONT ICON SET / TYPOGRAPHY



Typeface: Roboto

COLOR OPTIONS - Mockups



Style Guide, Best Practice and Content Accessibility Guidelines



Best Practices

The following 2 items require your attention

- Family Name** cannot be blank.
- There is 1 row in the result set that requires attention.
- Ethnicity** is required selection.

Family Name: *

Please enter a valid Family name

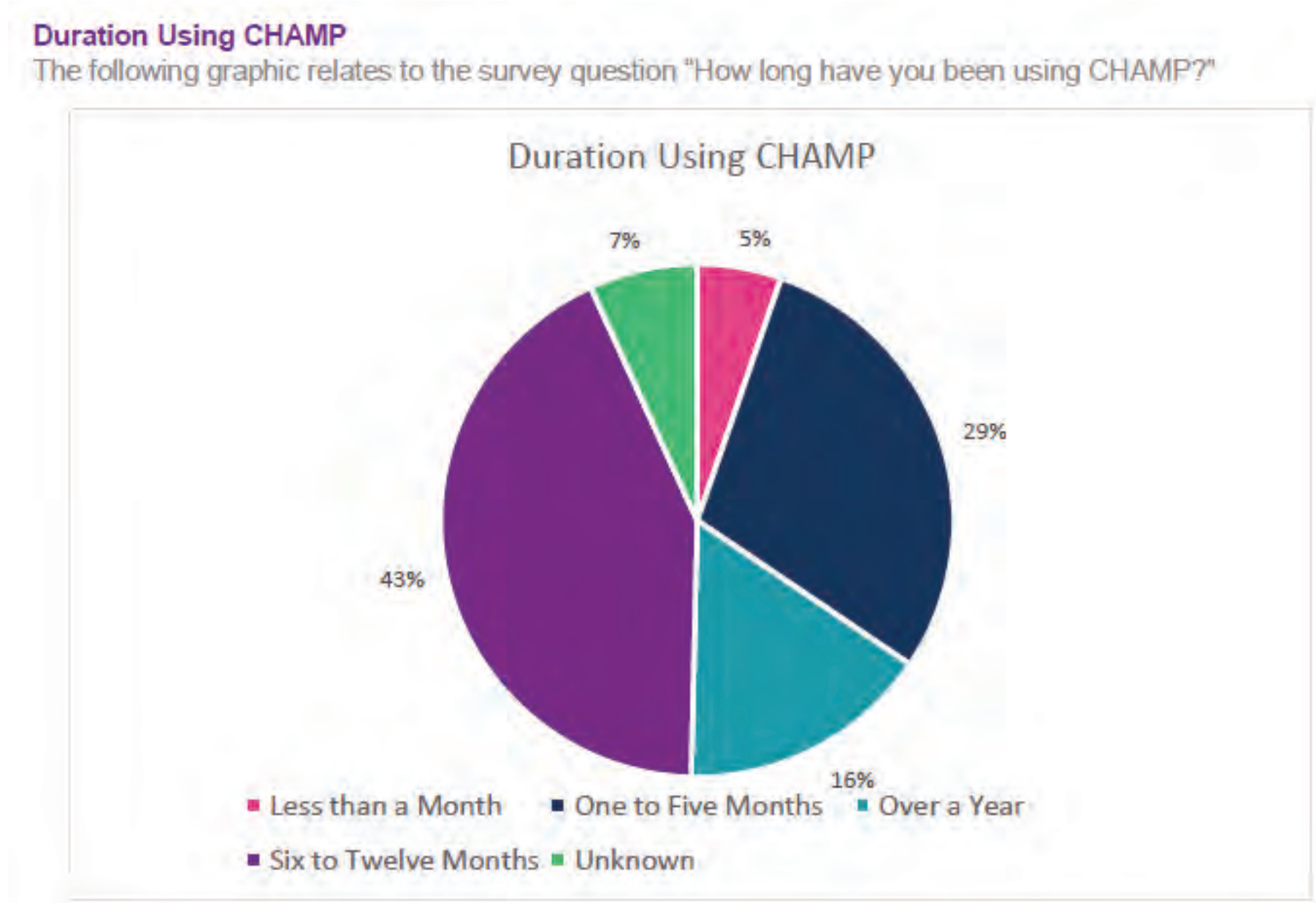
New Enhancement - For Screen Reader users

Assessment Date (MM/DD/YYYY): *

05/09/2018

Color Contrast Checker - <https://webaim.org/resources/contrastchecker/>

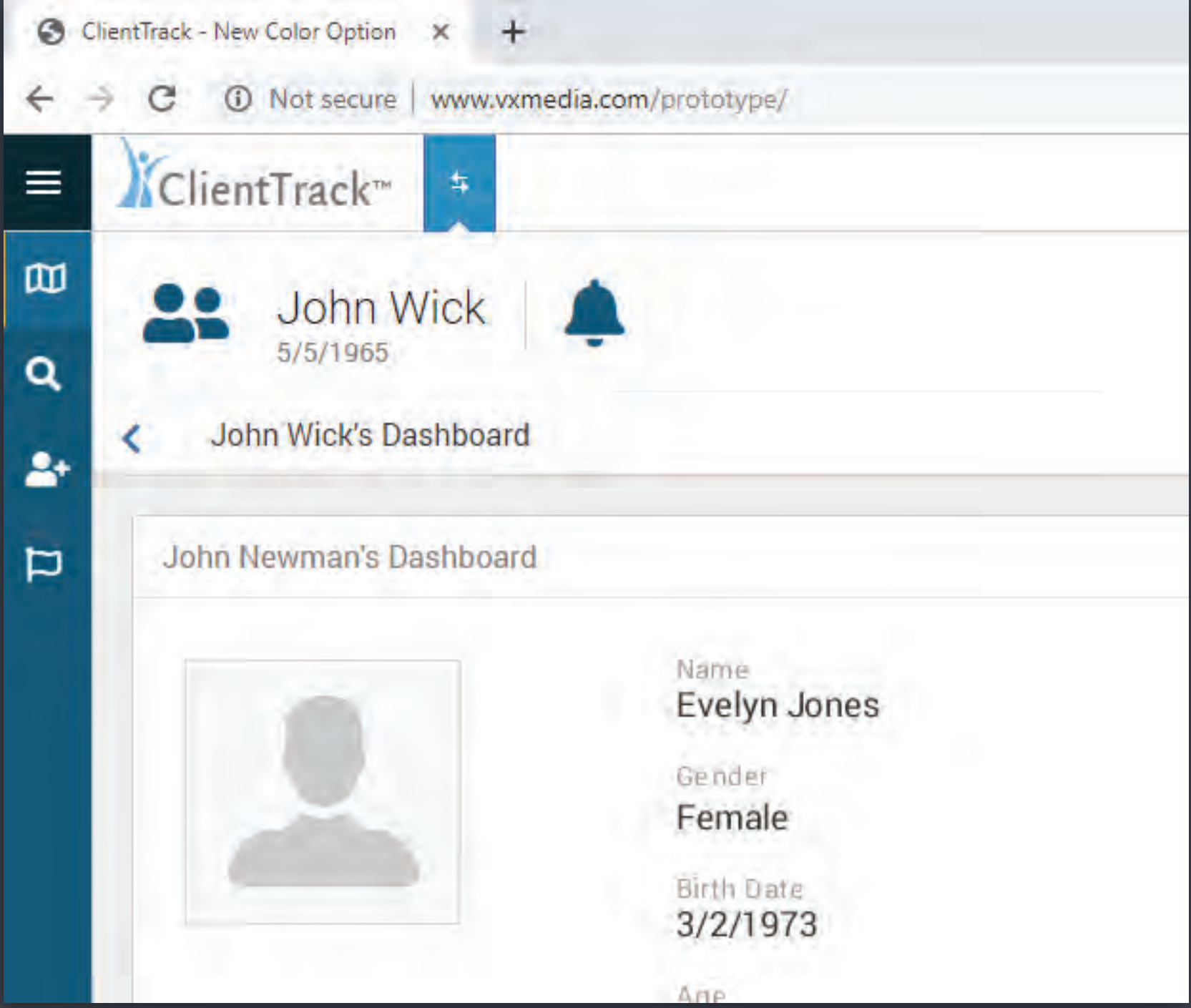
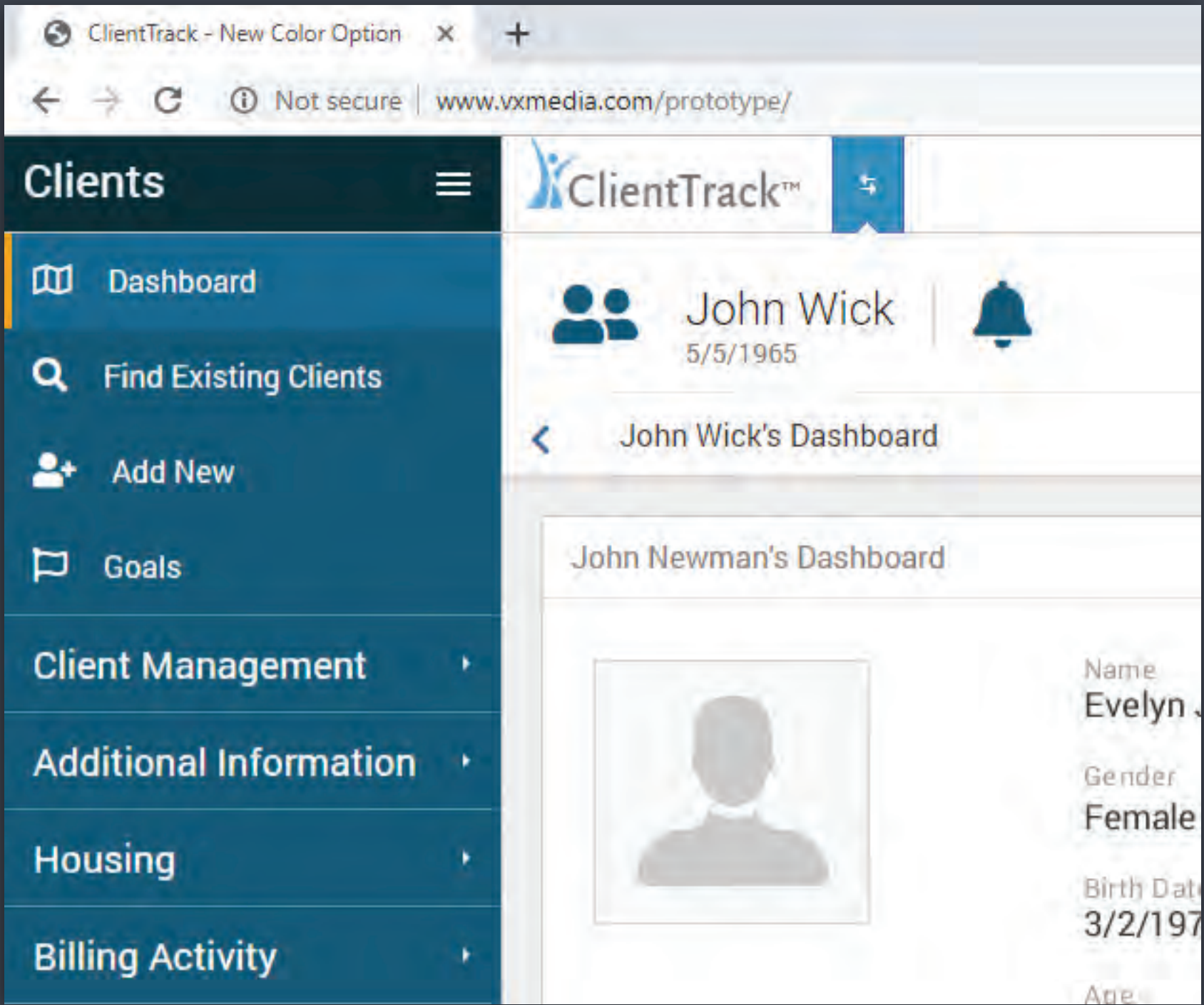
Survey Results - Survey Monkey



Prototype with interactions (Motion)

Developed fully fuctional prototype for usability testing

<http://www.vxmedia.com/prototype/>



Additional design specs and mockup

Clients

Dashboard

Find Existing Client

Add New Client

Goals

Care Management

Profile

Problem List

Encounters

Treatment Plan

Labs

Enrollments

Services

Referrals

Referral Eligibility

Health Assessments

Other Assessments

Insurance

Notes

Client's Calendar

Client Reports

ClientTrack

ALL

Search

Maria Gutierrez

Help

Sign Out

Newman, John

3/2/1973

Enrollments

Enrollment Case

Enter the Enrollment Date. Identify the Case, which includes the Program, Grant and Family. Select Relationship to Head of Household. Select a Case Manager assignment for the enrollment. Select the Entry Assessment, enter any Comments, and create a Followup for the client and case manager if desired.

Name: Joseph, Martinez

Enrollment Date: 08/27/2018

Case

For a head of household client, use the default value to create a new case. For a family member, use the lookup to select the head of household's case - this will enroll the family member as a case member in the same case.

Case: Joseph, Martinez

Program: -- SELECT --

Grant: -- SELECT --

Family: Joseph, Martinez - 4229

Relationship to Head of Household: Self

Case Manager: Satya Janakiram

Entry Assessment

Select the Assessment corresponding to the point-in-time of entry for this enrollment.

Entry Assessment: No Assessment Selected

Comments:

Save

Pause

Cancel

Design Specs for Engineering & QA team

Steps performed before the launch

1. Internal testing with teams - A/B & Usability Testing

- Marketing

- Solution Delivery / Business Analyst

- implementation Engineers

- Account Executives

- Product Management

- Sales & HR

- Engineering & QA

2. External Users - Clients - A/B & Usability Testing

- Admins and End Users Groups

3. Protototype - Testing (Iterative Process - Step 1 & 2)

4. Roll Out Plan

5. Communication Plan (with Marketing Team)

6. Release Planning (With Solution Delivery Team)

Wireframes - Phase II

Logo

WORKGROUP

All Search

SJ User Name Help Signout

FAVORITES

MY DASHBOARD CLIENTS PROGRAMS SUPPORT BILLING More + Workflow 2 Housing for Health

Client Dashboard

Recent Clients

WPC Application

Comprehensive Screen

Care Plan

CLIENT MANAGMENT

Client Profile

Emergency Contacts

Applications

Care Plan Viewer

Completed Case Notes

Calendar

Tasks

Care Team

Completed Comp Assessment

Assessments(Eligibility)

Assessment (Others)

UAT CHW

Client ID: 410770

UAT CHW Dashboard

HOUSING

FUNDING STREAM

UAT CHW Information

No records found.

Client Insurance

No records found.

Enrollments

No records found.

Consents

No records found.

Care Team

No records found.

Logo

WORKGROUP

All Search

SJ User Name Help Signout

FAVORITES

MY DASHBOARD CLIENTS PROGRAMS SUPPORT BILLING More + Workflow 2 Housing for Health

Client Dashboard

Recent Clients

WPC Application

Comprehensive Screen

Intake New Client

CLIENT MANAGMENT

Client Profile

Emergency Contacts

Applications

Care Plan Viewer

Completed Case Notes

Calendar

Tasks

Care Team

Completed Comp Assessment

Assessments(Eligibility)

Assessment (Others)

UAT CHW

Client ID: 410770

Basic Client Intake

Identifying Information

Contact Information

Demographic Information

WPC Application

Review Pause Cancel

New/Current Client?

Basic Client Intake

Application

Save Application

ORCHID MRN required. Click Here to search for ORCHID MRN.

Enter basic client information below. Fields with a red asterisk (*) are required.

First Name: *

Middel Name:

Last Name: *

Birth Date: * 01/01/1950

Age: 68

Birth Date Quality: *

Ful DOB Reported

Approximate or Partial DOB Reported

Client doesn't know

Client refused

Data not collected

Client ID: 410770

ORCHID MRN: 23234552

Please enter a valid ORCHID MRN

Save & Exit

Next

Logo

WORKGROUP

All Search

SJ User Name Help Signout

FAVORITES

MY DASHBOARD CLIENTS PROGRAMS SUPPORT BILLING More + Workflow 2 Housing for Health

Client Dashboard

Recent Clients

WPC Application

Comprehensive Screen

Intake New Client

CLIENT MANAGMENT

Client Profile

Emergency Contacts

Applications

Care Plan Viewer

Completed Case Notes

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Tasks

Care Team

Completed Comp Assessment

Assessments(Eligibility)

Assessment (Others)

UAT CHW

Client ID: 410770

Client Tasks

The selected client's current tasks (those which are not completed or begin today) are displayed below. Check Display Future Tasks to see tasks which have not yet begun. Press the Add New button to add a new record.

All Future Completed

Add New Task

Client Tasks

50 Results Found

	Task Name	Task Type	Status	Priority	Begin Date	Due Date	Actions
Overdue (1)	<input type="checkbox"/> Coordinate with CBEST...	Arrange Transportation	New / Pending	High	03/16/2016	3/20/2015	
Current Tasks (9)	<input type="checkbox"/> Application Provided	Call Provider office to...	Cancelled	Medium	03/16/2016	3/20/2015	
	<input type="checkbox"/> Contact Housing Org.	Other	New / Pending	Medium	03/16/2016	3/20/2015	
	<input type="checkbox"/> Contact Housing Org.	Other	New / Pending	Medium	03/16/2016	3/20/2015	
	<input type="checkbox"/> Contact Housing Org.	Description goes here...	New / Pending	Medium	03/16/2016	3/20/2015	
	<input type="checkbox"/> Contact Housing Org.	Description goes here...	New / Pending	Medium	03/16/2016	3/20/2015	

Showing 1 to 10 of 301 items