

Clinical Application UX for DaVita Healthcare Partners

User Workflow Documentation

UX Design for a Multi-Module Clinical Platform Serving Dialysis Care Teams

DaVita Healthcare Partners operated a network of dialysis clinics relying on disconnected legacy applications for patient care, billing, scheduling, and prescription management. I joined a centralized UX team to redesign these tools from the ground up.

The work spanned six clinical modules: patient registration and clinical documentation, ICD-10 diagnostic coding, facility and scheduling management, ePrescribe and refill management, insurance coverage details, and payer intelligence. Each module served a different user type, from bedside nurses and PCTs to billing coordinators and clinic administrators.

I visited DaVita clinics to observe workflows firsthand, translated business and compliance requirements into high-fidelity Axure prototypes, and worked within a shared Kendo UI component library to keep the experience consistent across all modules. All screens were approved by product managers, project managers, and UI leads without revision loops.
Per-Screen Header Rewrites

WORKFLOW SEQUENCE

- Page 2 - Reggie - Clinical Record, Read Mode** - Consolidated patient data across dialysis, diagnosis, facility, and transplant information
- Page 3 - Reggie - Clinical Record, Edit Mode with ICD-9 to ICD-10 Lookup** - Inline code lookup panel lets billing staff cross-reference diagnosis codes without leaving the patient record
- Page 4 - Maestro - Facility Map, Read Mode** - POD and chair layout by shift schedule, with facility information and staffing metrics
- Page 5 - Maestro - Facility Map, Edit Mode** - Administrators configure POD count, chair assignments, hours of operation, and copy schedules across shift days
- Page 6 - Maestro - Patient Sheet, Edit and Read States** - Patient demographics, access type, care flags, and recurring treatment appointments by POD and chair
- Page 7 - Insurance Coverage Details - Modal View** - Copay tiers, benefit coverage rules, prior authorization requirements, and drug coverage limits by insurance policy
- Page 8 - ePrescribe - Formulary Exception Request** - Prescription order form with lab results, formulary rule logic, and active medication reference panel for clinical review
- Page 9 - ePrescribe - Refill Management Modal** - Modal workflow for managing prescription delivery dates with options to expedite, delay, or hold without change
- Page 10 - ePrescribe - New Prescription Order** - Full prescription entry with SIG preview builder, ESRD condition flag, prescriber assignment, and pharmacy routing
- Page 11 - Reggie - Payer Intelligence** - Rules, Forms, and Cutover Logic | Billing rules manager with payer configuration, treatment rule toggles, authorization logic, and publish progress tracking

DESIGN PRINCIPLES

- Role-Based Workflows** - Each module was designed around a specific user type, from nurses documenting patient care to billing staff managing payer rules
- Compliance-First Interactions** - ICD-10 lookup, ESRD flags, and formulary exception logic were built directly into the workflow, not bolted on
- Consistent Component System** - All screens used the shared Kendo UI library to maintain visual and interaction parity across six distinct modules
- Minimal Disruption** - Edit and read states kept users oriented within the same screen, reducing context switching during active patient care

IMPACT

- All assigned screens approved by product managers, project managers, and UI leads without revision loops
- ICD-10 lookup reduced reliance on external code reference tables during a high-pressure compliance transition
- ePrescribe and refill workflows cut the number of steps to complete medication tasks
- Facility and scheduling tools gave clinic administrators a cleaner view of daily operations - Development team received documented, revision-free prototypes across all six modules

Clinical Application UX for DaVita Healthcare Partners

Reggie - Clinical Record, Edit Mode with ICD-9 to ICD-10 Lookup: Inline code lookup panel lets billing staff cross-reference diagnosis codes without leaving the patient record

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Reggie

Home

Tools

Search

Reports

Help

Johnson, Robert Matthew (1234567)

00521 - Knickerbocker Dialysis, Inc. Garden City Dialysis Center (Home)

00521 - Knickerbocker Dialysis, Inc. Garden City Dialysis Center (Visiting)

SSN: 555-55-5555

DOB: 05/01/1955

Options

Notes

ACTIVE

FULLY INSURED

MAINTAINED

NON-COMMT

COVERAGE

Home

Tools

Patients

Johnson, Robert Matthew

Clinical

Categories

Admit/Discharge

Alerts

Checklists

Clinical

Coding

Contact

Coordination of Benefits

Coverage History

Demographics

Documents

HIPAA

Insurance Policies

MSP

Patient History

Providers

Clinical

Dialysis Information

Anticipated DaVita Start Date:

08/20/2013

Actual DaVita Start Date Updated from CRIS / Snappy:

08/24/2013

Anticipated Restart Date:

09/02/2013

FDOD Ever from 2278:*

08/10/2013

Modality Type:*

In Center Hemo-Staff

Method:

Some type of method here

Supply Vendor:

Some Supply Vendor here

Save

Cancel

Cause of Renal Failure

2278 Exemption

☒ Yes

☐ No

Primary Diagnosis for Dialysis

N17.2 Acute kidney failure with medulla

Lookup ICD-9

Primary Cause for ESRD - ICD-9

202.80 Oth types of non-Hodgkin lymphoma, unspecified

Primary Cause for ESRD - ICD-10

C85.80 Oth types of non-Hodgkin lymphoma, unspecified

Save

Cancel

Case Mix Adjuster Questionnaire

Have you ever been diagnosed with one of the following?

Sickle Cell Disease:

☐ Yes

☐ No

☒ I don't know

Monoclonal Gammopathy: (an abnormal monoclonal protein in your blood, may also be called "paraproteinemia")

☐ Yes

☐ No

☒ I don't know

Mycelodysplastic Syndrome: (a bone marrow disease, might be called "preleukemia")

☐ Yes

☐ No

☒ I don't know

Save

Cancel

Facility Information

Home Facility:

(06829) CANTON RENAL CENTER

Hemodialysis Backup Facility:

A Backup Facility Name

Referral Source:

Other

Referral Date:

08/05/2013

Non-DaVita Facility Name:

A Facility Name

Non-DaVita Facility Phone:

(201) 333-1234

PD or Home Hemo Training in first 90 days?

☐ Yes

☒ No

Save

Cancel

Transplant Information

Has patient had a transplant?

☐ Yes

☒ No

Transplant Date:

N/A

Return to Dialysis Date:

N/A

Transplant Failure Date:

N/A

Save

Cancel

ICD-9 Code Lookup

ICD-9	ICD-10
428	I50.9 Heart failure-unspecified
584.5	N17.0 Acute kidney failure with tubular necrosis
583.6	N17.1 Acute kidney failure with acute cortical necrosis
584.7	N17.2 Acute kidney failure with medullary necrosis
584.8	N17.8 Other acute kidney failure
584.9	N17.9 Acute kidney failure, unspecified
585	N18.6 End stage renal disease
585.1	N18.1 Chronic kidney disease, stage 1
585.2	N18.2 Chronic kidney disease, stage 2 (mild)
585.3	N18.3 Chronic kidney disease, stage 3 (moderate)
585.4	N18.4 Chronic kidney disease, stage 4 (severe)
585.5	N18.5 Chronic kidney disease, stage 5
585.6	N18.6 End stage renal disease
585.9	N18.9 Chronic kidney disease, unspecified
586	N19 Unspecified kidney failure

Clinical Application UX for DaVita Healthcare Partners

Maestro - Facility Map, Read Mode: POD and chair layout by shift schedule, with facility information and staffing metrics

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Maestro
03705 - GHC Legacy - Gambro Health ...

Home

Schedules

Patients

Tools

Signed in as Tuftee. S. (RN)

Facility Map

Edit

Monday Wednesday Friday

There are 28 chairs assigned.

Number of POD(s) / Area: 7

Chairs per POD / Area: 4

POD: 1

Chair: 15

ISO: 7

Chair: 4

Chair: 9

POD: 2

Chair: 16

Chair: 18

Chair: 17

Chair: 10

POD: 3

Chair: 1

Chair: 2

Chair: 3

Chair: 5

POD: 4

Chair: 6

ISO: 8

Chair: 11

Chair: 12

POD: 5

Chair: 13

Chair: 14

Chair: 15

Chair: 16

POD: 6

Chair: 19

Chair: 20

Chair: 21

Chair: 22

POD: 7

Chair: 23

Chair: 24

Chair: 25

Chair: 26

Chair: 27

Chair: 28

Tuesday Thursday Saturday

There are 28 chairs assigned.

Sunday

There are 28 chairs assigned.

Facility Information

Edit

03705 - GHC - Gambro Healthcare - Crossville Reprocess

Address: 5000 Yellow Street

City: Denver, CO

Zipcode: 12345

Telephone: 1 (012) 345-6789

Fax: 1 (012) 345-9876

Days Open:

Open Time:

Close Time:

Su08.0013.00

Mo05:0022:00

Tu06:0018:00

We05:0022:00

Th06:0018:00

Fr05:0022:00

Sa05:0014:00

Facility Unpaid Break

In the State of Colorado. A Teammate must work 4.30 (hours) in order to receive an unpaid break.

Facility Metrics

Edit

Budgeted Hours for RN

#####

Budgeted Hours for LPN

#####

Budgeted Hours for PCT

#####

Budgeted DPC Total

#####

Clinical Application UX for DaVita Healthcare Partners

Maestro - Facility Map, Edit Mode: Administrators configure POD count, chair assignments, hours of operation, and copy schedules across shift days

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Maestro
03705 - GHC Legacy - Gambro Health ...

Home

Schedules

Patients

Tools

Signed in as Tuftee, S. (RN)

Facility Map (EDIT)

Monday Wednesday Friday

There are 28 chairs assigned.

How many POD(s) do you need? 7

How many chairs in each POD? 4

Update

POD: 1

Chair

15

ISO

7

Chair

4

Chair

9

Add Chair

POD: 2

Chair

16

Chair

18

Chair

17

Chair

10

Add Chair

POD: 3

Chair

1

Chair

2

Chair

3

Chair

5

Add Chair

POD: 4

Chair

6

ISO

8

Chair

11

Chair

12

Add Chair

POD: 5

Chair

13

Chair

14

Chair

15

Chair

16

Add Chair

POD: 6

Chair

19

Chair

20

Chair

21

Chair

22

Add Chair

POD: 7

Chair

23

Chair

24

Chair

25

Chair

26

Chair

27

Chair

28

Add Chair

Tuesday Thursday Saturday

There are 28 chairs assigned.

Sunday

There are 28 chairs assigned.

Save

Cancel

Facility Information (EDIT)

03705 - GHC - Gambro Healthcare - Crossville Reprocess

Address: 5000 Yellow Street

City: Denver, CO

Zipcode: 12345

Telephone: 1 (012) 345-6789

Fax: 1 (012) 345-9876

Days Open: Open Time: Close Time:

☒ Su

05:00

22:00

☒ Mo

06:00

18:00

☒ Tu

05:00

22:00

☒ We

06:00

18:00

☒ Th

05:00

22:00

☒ Fr

05:00

14:00

☒ Sa

08:00

13:00

Save

Cancel

Facility Unpaid Break

In the State of Colorado. A Teammate must work 4.30 (hours) in order to receive an unpaid break.

Facility Metrics (EDIT)

Budgeted Hours for RN

####

Budgeted Hours for LPN

####

Budgeted Hours for PCT

####

Budgeted DPC Hours / TX

####

Save

Cancel

Monday Wednesday Friday

Copy facility map to:

☐ Tu Th Sa

☐ Su

Save

Cancel

Clinical Application UX for DaVita Healthcare Partners

Maestro - Patient Sheet, Edit and Read States: Patient demographics, access type, care flags, and recurring treatment appointments by POD and chair

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Maestro03705 - GHC Legacy - Gambro Health ...

HomeSchedulesPatientsToolsSigned in as Tuftee. S. (RN)

SchedulesMaster SchedulePatient Sheet for Johnson, Robert Matthew

Patient Sheet

Patient Demographic

Firstname:*Robert Matthew

Emergency Contact:Celine Johnson

Lastname:*Johnson

Relationship:Spouse

MPI #:1234567

Telephone:1 (323) 345-6789

Access Type:Fistula / Graft

PO / TO:

15 min15 min

Put OnTake Off

Notes:Patient gets dizzy after take off -- Needs to rest for about 20 minutes

Flags +

SaveCancelDelete

Recurring Appointments

07/04/2013	--	15 min	15 min		
Start Date	End Date	Put On	Take Off		
		Start Time	End Time	TX Length	
Monday	06:00	10:30	4.30	POD 1	Chair 1
Wednesday	06:00	10:30	4.30	POD 1	Chair 1
Thursday	13:00	15:00	2.00	POD 4	Chair 7
Friday	06:00	10:30	4.30	POD 1	Chair 1

SaveCancel

Flags +

☒ CVC

☐ Hep B Positive

☒ Wheelchair

☐ Dementia

☐ Lift

☒ Other

Emergency Assistance

Separate with a comma (,)

SaveCancel

Maestro03705 - GHC Legacy - Gambro Health ...

HomeSchedulesPatientsToolsSigned in as Tuftee. S. (RN)

SchedulesMaster SchedulePatient Sheet for Johnson, Robert Matthew

Patient Sheet

Patient Demographic

Johnson, Robert Matthew (1234567)

Telephone:1 (323) 345-2222

Emergency Contact:Celine Johnson

Access Type:Fistula

Relationship:Spouse

15 min15 min

Put OnTake Off

Telephone:1 (323) 345-1111

Flags:CVC, Wheelchair, Dementia, Emergency Assistance

Transportation:Self

Notes:Patient gets dizzy after take off - Needs to rest for about 20 minutes

Edit

Recurring Appointments

07/04/2013	--	15 min	15 min		
Start Date	End Date	Put On	Take Off		
		Start Time	End Time	TX Length	
Monday	06:00	10:30	4.30	POD 1	Chair 1
Wednesday	06:00	10:30	4.30	POD 1	Chair 1
Thursday	13:00	15:00	2.00	POD 4	Chair 7
Friday	06:00	10:30	4.30	POD 1	Chair 1

Clinical Application UX for DaVita Healthcare Partners

Insurance Coverage Details Modal View: Copay tiers, benefit coverage rules, prior authorization requirements, and drug coverage limits by insurance policy

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Coverage Details

Coverage Details	
Copay	\$100.00
Benefit Copay	\$100.00
Percentage Copay	n/a
Combination flat/percentage	n/a
Copay tier	Tier 3
Min & Max Copay	\$500.00
Days supply per stated copay	30 Days
Copay difference by Pharmacy Type	n/a
Summary Copay	\$50.00
Drug-Specific Copay	\$50.00
Retail Copay	\$20.00
Mail Order Copay	\$20.00
LTC Copay	\$20.00

Benefit Coverage	
Prior authorization requirements	Required due to cost of medication. Clinical Documentation required for approval.
Step therapy requirements	n/a
Step medications	n/a
Age limits	n/a
Gender limits	n/a
Quantity limits	n/a
Drug coverage exclusions	30 tablets / month
Medical Necessity	n/a

Clinical Application UX for DaVita Healthcare Partners

ePrescribe - Formulary Exception Request: Prescription order form with lab results, formulary rule logic, and active medication reference panel for clinical review

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ePrescribe

Patient List

Prescriber Worklist8

Signed in as Mullen. Tina (RN)

Rx Management

Review medications, Create and Discontinue prescriptions, Manage refills, View Med history

Patient List

Manage Rx for Johnson, Robert Matthew

New Prescription

Prescription Order

Formulary Exception Request

Johnson, Robert Matthew

DOB: 07/07/1944, Age: 68, Male

Lisinopril (Prinvil Tablet)

SIG:

Longest possible entry of 140 nsectetur adipiscing elit. Nulla venenatis felis vitae mauris tempus id eleifend nisl porttitor. Donec nullam.

Duration:

30d

Quantity:

90 Tablets

Formulary Rule:

Phos-lo is a formulary exception, except when Phos > = 7

Labs:

Test Name	Test #	Results / Date		
CorCa	1016	4.9 08/05/2012	5.1 07/17/2012	4.8 06/26/2012
Phos	2244	36.6 (L) 08/05/2012	37 07/17/2012	36.8 (L) 06/26/2012
PTH	1010	12.40 (H) 08/05/2012	11.8 07/17/2012	12.1 06/26/2012

Intolerance:

Facility Contact: *

Tina Mullen, RN

1000 Bake Pkwy, Franklin, TN 37253
T: (213) 223-4567 F: (213) 223-4567

Prescriber Comments:

* Required Fields

Send to Prescriber

Submit

Cancel

Prescription Information

On-Formulary Alternatives

Zestril 20mg Tablet
Prinzide 20 - 12.5 Tablet
Zestoretic 20 - 12.5 Tablet

Reference Information

Allergies

Aleve, Betadine, Codeine, Dye, Latex, Penicillin, G, Pollen

Comorbidities

12/08/2008 - HypoCalcemia (275.41)
12/08/2008 - Hypertension (275.41)
12/08/2008 - Other Contributors (275.41)
12/08/2008 - Other Contributors (275.41)
12/08/2008 - Other Contributors (275.41)
12/08/2008 - Other Contributors (275.41)
12/08/2008 - Other Contributors (275.41)

Active Prescription Medications

1. Calciferol Cholecalciferol (D3) 1.5mg

1 tablet once a day by mouth before food, for 30 days. Additional directions can be added here.

2. Insulin

As needed. Test insulin levels before taking the shot.

3. Lipitor (Astorvastatin) 20mg

1 tablet, 2x/day, PO, 90 days

4. Lisinopril 20mg

1 tablet twice a day by mouth. Take before food, for 90 days

5. Nexium (Esomeprazole) 40mg

1 capsule, Daily PO

6. Phenegan (Promethazine) 25mg

1 tablet, 2x/day, PO, 90 days

Active Non-Prescription Medications

1. Asprin, ASA 81mg

1 tablet, Daily, PO

2. Fish Oil 1000mcg

1 tablet, Daily, PO

Clinical Application UX for DaVita Healthcare Partners

ePrescribe - Refill Management Modal View: Modal workflow for managing prescription delivery dates with options to expedite, delay, or hold without change

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Refill Management

Lipitor (Astrovastatin)

20mg (60 Tablets)
Longest possible entry of 140 nsectetur adipiscing elit. Nulia venenatis felis vitae mauris tempus id eleifend nisl porttitor. Donec nullam.

Next Delivery Date is: 08/02/2013 [Change](#)

What would you like to do?

☒ No Change
There will be no change on the prescription

☐ Expedite
The prescription will be sent 3 Days from T

☐ Delay

2 weeks

The prescription will be delayed 2 weeks fro

Submit

Cancel

< >

Aug '13

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Clinical Application UX for DaVita Healthcare Partners

ePrescribe - New Prescription Order: Full prescription entry with SIG preview builder, ESRD condition flag, prescriber assignment, and pharmacy routing

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ePrescribe

Patient List

Prescriber Worklist8

Signed in as Mullen. Tina (RN)

Rx Management

Review medications, Create and Discontinue prescriptions, Manage refills, View Med history

Patient List

Manage Rx for Johnson, Robert Matthew

New Prescription

Prescription Order

New Prescription

Choose a Source

Johnson, Robert Matthew

DOB: 07/07/1944, Age: 68, Male

Drug Name: *

Lisinopril

Dose:

20

mcg

Frequency:

PO - By Mouth

Route:

b.i.d. - Twice Daily

PRN:

Yes

No

SIG Preview

By Mouth

Twice Daily

with meal

As Needed

35/140

Duration:

30

days

Quantity:

90

Refill Quantity:

3

Start & End Dates:

/

/

-

/

/

ESRD related Medical Condition

Dispense as Written

Prescriber:

Dr. Sarah Anderson (1234567890123)

103 White Bridge Pike, Nashville, TN 37209

Collaborating Physician:

Dr. Sarah Anderson (1234567890123)

103 White Bridge Pike, Nashville, TN 37209

Notes to Prescriber:

Pharmacy:

Walgreen Pharmacy Franklin

1900 Carothers Pkwy, Franklin, TN 37253

(O) 615-888-9999

Notes to Pharmacy:

Longest possible entry of 140 nsectetur adipiscing elit. Nulla venenatis felis vitae mauris tempus id eleifend nisl porttitor. Donec nullam.

* Required Fields

Send to Prescriber

Submit

Cancel

Prescription Information

On-Formulary Alternatives

Zestril 20mg Tablet

Prinzide 20 - 12.5 Tablet

Zestoretic 20 - 12.5 Tablet

Reference Information

Allergies

Aleve, Betadine, Codeine, Dye, Latex, Penicillin, G, Pollen

Comorbidities

12/08/2008 - HypoCalcemia (275.41)

12/08/2008 - Hypertension (275.41)

12/08/2008 - Other Contributors (275.41)

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12/08/2008 - Other Contributors (275.41)

Active Prescription Medications

1. **Calciferol Cholecalciferol (D3) 1.5mg**

1 tablet once a day by mouth before food, for 30 days. Additional directions can be added here.

2. **Insulin**

As needed. Test insulin levels before taking the shot.

3. **Lipitor (Astorvastatin) 20mg**

1 tablet, 2x/day, PO, 90 days

4. **Lisinopril 20mg**

1 tablet twice a day by mouth. Take before food, for 90 days

5. **Nexium (Esomeprazole) 40mg**

1 capsule, Daily PO

6. **Phenegan (Promethazine) 25mg**

1 tablet, 2x/day, PO, 90 days

Active Non-Prescription Medications

1. **Asprin, ASA 81mg**

1 tablet, Daily, PO

2. **Fish Oil 1000mcg**

1 tablet, Daily, PO

Clinical Application UX for DaVita Healthcare Partners

Reggie - Payer Intelligence: Rules, Forms, and Cutover Logic | Billing rules manager with payer configuration, treatment rule toggles, authorization logic, and publish progress tracking

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Reggie

HomeToolsSearchReportsHelp

Payer Intelligence

Sub-Text Goes Here

Add New

HomeToolsPayer IntelligencePayerBCBS FL

Search

Search for a

Payer

BCBS

Options

Search

Clear

Payer

Payer Details

Edit

Payer Name:BCBS FL

Payer Short Name:Some Short Payer Name

Plan Group:BCFL

Payer Status:Active

Date Active:mm/dd/yyyy to mm/dd/yyyy

Cutover Logic:Yes

Publish Progress

Impacted Patients

This indicates your progress when adding a Payer in PI.

Payer

Rules

Forms

Template

Cutover Logic

Publish

Submit

Rules / Forms / Templates

Rules

Create New Rule

Attach Rule(s)

Rule Name:BCBS FL All Services PD Rule (HMO)

Treatment Items:CAPD: Daily Treatment CCPD: DailyTreatment Epogen

Forms:BCBS FL Form 1

Forms Template:BCBS FL Fax Template

Rule Name:BCBS FL All Services HEMO Rule (HMO)

Treatment Items:HEMODIALYSIS, FULL CARE, OUTPATIENT, Epogen

Forms:BCBS FL Form 1

OFFUnattach

Rule Name:BCBS FL PD Rule (Medicare Plus Choice)

Treatment Items:CAPD: Daily Treatment CCPD: Daily Treatment

Forms:BCBS FL Form 1

ONUnattach

Rule Name:BCBS FL HEMO Rule (Medicare Plus Choice)

Treatment Items:HEMODIALYSIS, FULL CARE, OUTPATIENT

Forms:BCBS FL Form 1

ONUnattach

Cutover Logic

Renewal Required

Yes

No

Permission Type:

Authorization / Referral Reason

Authorization / Referral Good for the following Facilities

Entity responsible for providing authorization / referral

Some other content

Some other content

Save

Cancel

Authorization applies to:

ALL Davita Facilities

HEMO

90999 - Dialysis Unspecified

90999 - Hemo Dialysis

PD

90945 - Peritoneal Dialysis

90947 - Peritoneal Dialysis

LAB

Routine

Non-routine

MEDS

All Drugs

EPO/Aranesp

Zemplar

Venofer

Others

"Submit" button at left will change to green active state once all sections of publish process are complete.

Submit