

Redesign
Key Areas of
Net Health's EHR
(Electronic Health Record)
Solution for Post-Acute
and Senior Living Facilities



Project Objective

Redesign the (2-3) most important areas of this product in a way that meet – or exceed both client and business needs/expectations.

Stakeholders (Partners)

Product Management

- Product: Primary stakeholder
- Engaged throughout all phases of a project

Clients (Key Focus)

- Conduct client workshops to understand user problems and needs
- Create, iterate, and refine designs, with multiple clients – keeping them engaged throughout entire project

Other Internal Stakeholders

Engineering, Sales, Support, Client Success, Implementation & Training, Compliance, Education, more

Determine Redesign Priorities (Phase 1*)

Process

- Defined information needed to enable us to make datacentric, client and business driven decisions
- Created all necessary tools and corresponding processes
- Met with multiple clients to glean critical input
- Created a consolidated matrix reflecting our clients' priorities (quantitative data)
- Calibrated with the Product Manager and internal stakeholder to make final decision

Product Roadmap/Redesign
Client Priorities and Corresponding Votes

Legend:
1 = Fair Design - Must fix NOW!
2 = Not essential, but still needs to be fixed now
3 = Really needs work, but not a priority
4 = Fair, it's functioning
5 = Excellent as is

Product Priority Workshop: GT Therapy

Client Priorities

Note: Phase 1 serves as the foundational research for both Case Studies 1 and 2.

Persona/Workflow Matrix

COM Rewrite :: Users and Corresponding Tasks/Workflows (All Disciplines)

	Task/Workflow Priority	Administrative Staff	Rehab Technicians	Therapists / Assistants	Rehab Directors (Half treating patients & half reporting)	Rehab Manager (May never treat patients but more reporting info)	Sr. Executive Role (Almost all reporting)	HR/Corporate Administrative (Primarily Administrative Console)
Role Priority	High	High	High	High	Med	Med	Med	
Primary Tasks/Workflows								
Intake/Referral Management (OTHH/Clinic)	x	x	x	x	x			
Schedules	x	x	x	x	x			
- Managing Appointments	x	x	x	x	x			
- Projections (Not in Clinic or OTHH)	x	x	x	x	x			
- Assignment Board	x	x	x	x	x			
- Appointment Book	x	x	x	x	x			
- Staff Schedule Templates								x
- Group Management (Group Therapy?)	x	x	x	x	x			
- Patient's Treatment Time Preferences	x	x	x	x	x			
Patient Management	x	x	x	x	x			
- Adjust Payers	x	x			x	x		
- Case Manager	x	x			x	x		
Hot List/Close-Out Management	x	x	x	x	x			
Printing of All Sorts of Things	x	x	x	x	x			
- Patient Docs	x	x	x	x	x			
- Reports	x	x	x	x	x		x	x
Labor Management	x				x	x		
- Time Clock and Labor Log Entry	x	x	x	x	x	x		x
- Time Clock and Labor Log Management					x	x		x
- Timeclock Admin (in Admin area)					x	x		x
Exports	x	x			x	x		
Messaging/Tasks	x	x	x	x	x	x	x	x
Administrative Tasks		x			x	x		
- Facility Layout (Not Clinic)	x	x			x	x		
o Wings	x	x			x	x		
o Room and Bed	x	x			x	x		
- Physician Management	x	x			x	x		x
- Contact Management	x	x			x	x		x
o Hospital	x	x			x	x		x
o Referral Sources	x	x			x	x		x
o Patient Contracts	x	x			x	x		x
- Site Calendar	x	x			x	x		
Additional Tasks/Workflows								
Daily Activity Log				x	x			
- Patient Billing				x	x			
- TEN				x	x			
Patient Documentation				x	x			
Manage Signatures				x	x			

Net Health Persona/Workflow Matrix
 This is a project-specific matrix based on the Fiserv deliverable that enabled me to better understand the impact of each key area of the product for each specific persona.

Product Roadmap/Redesign

Client Priorities and Corresponding Votes

- 1 = Poor Design -- Must fix NOW!
- 2 = Not terrible, but still must be fixed now
- 3 = Really needs work, but not a priority
- 4 = Fair, it's functioning
- 5 = Excellent as is

ABSC (April, Gary)
Overall Importance (Low, Med, High)
Workflow Rating (1-5)

	Votes		
Primary Tasks/Workflow			
Intake		High	4
Scheduling	8	High	1-2
Staff Schedules		High	2
Reviewing Prior Appointments		High	4
Scheduling Tool 1		High	1
Scheduling Tool 2		Low	2
Misc. Scheduling		High	2
Group Appointments		High	1
Concurrent Appointments		High	3
Documentation Printing		High	4
Full Document		High	3
Partial Document		Med	3
Internal Messaging		High	3
Clinical Documentation	5	High	1
Workflows		High	2
Clinical Pathway Features (PDPM)		High	1
Section GG (Compliance)		High	2
Close Out Management		Med	3
Reports		High	4
Standard		High	3
Detailed		Med	3
Labor Management		Med	4
Time Clock and Labor Log Entry		Med	4
Time Clock and Labor Log Management		Med	4
Time Clock Admin		Med	4
Exporting		Med	3
Messaging/Tasks		High	2
Administration Tasks			
Documentation Assessments		High	3
Facility Layout		Low	3
Room		Low	3
Bed		Low	3
Physician Management		High	4
Contact Management		Low	3
Clinic		Low	3
Hospital		Low	3
Misc.		Low	3
Custom Form Management	1	High	1
Exercise Module		High	2
Template Management		Med	2
Signature Management	1	High	2
Managing Signatures		High	2
E-Signature Functionality		High	2
Product Integration		High	3

Quantitative & Qualitative Data

Building on research tools I developed as the UPS Quality Improvement Manager of the South California District, I created a set of deliverables and processes to capture both quantitative and qualitative insights.

Process

I conducted one-on-one sessions with 12 key clients, ranging from Directors to C-suite leaders, along with their select team members, to gather in-depth insights. Each session was recorded to ensure accurate capture of qualitative feedback.

Each participating client team was asked to evaluate:

- The importance of each product area (Low, Medium, High)
- The current design/workflow (rated on a 1–5 scale)

After completing these evaluations, each client was given a total of 15 votes to allocate to the workflows they felt were most impactful and in need of redesign. (Note: Clients could allocate all 15 votes to a single workflow or distribute them across multiple workflows based on their priorities.)

After conducting this process across all 12 clients, I consolidated the quantitative and qualitative data to develop a comprehensive view of client needs and priorities. (Note: The orange highlighted cells represented the most impactful areas.)

Utilizing the information gleaned from these one-on-one client sessions, I created an extensive qualitative and quantitative recap along with proposed recommendations based on business needs and potential ROI for the Product Manager and other cross functional team members. After multiple collaborative sessions we defined the initial requirements for this project.

Top 3 Redesign Priorities

Scheduling

1. Group Therapy Management (6 Week Project)

Clinical Documentation

2. Clinical Pathways & Product/Workflows Reorganization (8 Week Project)
3. Section GG Workflows/Features (4 Week Project)

Total

18 Weeks Total

Top 3 Redesign Priorities (Phase 2)

Scheduling

1. Group Therapy Management (6 Week Project)

Clinical Documentation

2. Clinical Pathways & Product/Workflows Reorganization (8 Week Project)
3. Section GG Workflows/Features (4 Week Project)

Total

18 Weeks Total

Group Therapy Management

Based on extensive quantitative and qualitative insights gathered from key clients and internal stakeholders, it became clear that a dedicated Group Management Scheduling view represented the most critical opportunity for product improvement.

The data consistently highlighted scheduling inefficiencies and workflow gaps, making this area the highest-impact focus for enhancing usability, operational efficiency, and overall user satisfaction.

Scheduling: Group Therapy Management

Group Therapy

- Allows therapists to treat 2-6 patients at the same time (class-style setting)
- Enables our clients to maximize their profits

Initial Requirements

- Create a new “Group Management” scheduling view
- Capture and display key group attributes
 - Group Name
 - Location
 - Percentage of Group/Concurrent utilization to date (within episodic period)
 - Additional configural fields
- Streamline group scheduling and management
- Deliver meaningful utilization and performance reports

Persona/Workflow Matrix

EXTERNAL ROLES/DEPARTMENTS														INTERNAL ROLES/DEPARTMENTS																																						
PRIORITY	Premier Analytics	Call Me-Referral Processing	View Cardholder record	Add Cardholder Record	Copy Cardholder Record	Status Cardholder Record	Force Activate	Maintenance	Reset PIN tries	Order Replacement Card	Cancel Order	View Order History	Files Refresh	Institution (IDF)::Establishing Annual Holidays	SPC::View Financial Transactions	Initiate Financial Transactions	Dispute/Adjust Financial Transactions	Enter Chargebacks/Representments	Enhanced Chargeback Service	Fiserv Provided Service (Apps: SPC)	Terminal::View Details	Terminal::Balance Mid-Point Adjustment	Transaction Journal	Tranview::Transaction Summary View	Tranview::Transaction Summary::Enter Adjustment	Tranview::Existing Adjustment Summary (View or Cancel)	Existing Correction Summary (View Only)	Terminal Last Activity Summary (View Only)	Tranblocker Activity Summary (View and Adjust)	Security Tab::Group Member Summary	Security Tab::User Administration	Client View Internet (CVI)	CaseTracker::View Case (EnrFactInFact)	CaseTracker::Update Case	CaseTracker::Manage Record Button (Card Mgmt)	Compromised Cards (Card Tracker)	Tranblocker::View a Rule	Tranblocker::Add a Rule	Tranblocker::Edit a Rule	Tranblocker::Copy a Rule	Tranblocker::Delete A Rule	Tranblocker::Setting Defaults	User Administration (Security)	Cardholder Preferences (View, Manage, Report)	ATM Manager (Third Party Vendor)	ATM Marketer (Third-Party Vendor)						
FINANCIAL INSTITUTIONS	Low	Low	High	High	High	High	Low	High	Med	Med	Med	Med	Low	Med	Low	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High					
Small Financial Institutions	Settlement / Daily Balancing	Adjustment/Chargeback	Operations – Card Management / Data En	Operations – Transaction Research	Risk Management	Helo Desk / Customer Service	Operations – ATM Support	New Accounts	Audit/Compliance	Security	Accounting	Program Management (Premier Analytics)	Teller Line	Third Party Organizations	Loan Servicing - Credit Gateway Clients	Medium Financial Institutions	Settlement / Daily Balancing	Adjustment/Chargeback	Operations – Card Management / Data En	Operations – Transaction Research	Risk Management	Helo Desk / Customer Service	Operations – ATM Support	New Accounts	Audit/Compliance	Security	Accounting	Program Management (Premier Analytics)	Teller Line	Third Party Organizations	Loan Servicing - Credit Gateway Clients	Large Financial Institutions	Settlement / Daily Balancing	Adjustment/Chargeback	Operations – Card Management / Data En	Operations – Transaction Research	Risk Management	Helo Desk / Customer Service	Operations – ATM Support	New Accounts	Audit/Compliance	Security	Accounting	Program Management (Premier Analytics)	Teller Line	Third Party Organizations	Loan Servicing - Credit Gateway Clients					
ATM Owners	POS Owners	INTERNAL ROLES/DEPARTMENTS	Business Development																																																	
1																Low	Low	Low	Low	Low	Low																															
1		Low														High	High	High	High	High	High																															
2			High	High	High	High	Low	High	Med	Med	Med	Med	Low			High	High	High	High	High	High																															
2			High	High	High	High	Low	High	Med	Med	Med	Med	Low			High	High	High	High	High	High																															
3			High	High	High	High	Low	High	Med	Med	Med	Med	Low			High	High	High	High	High	High																															
4		Low	High	Low	Low	High	Med	Med	Med	Med	Med	Med				Med	Med	Med	Med	Med	Med																															
4			High	High	High	High	Low	High	Med	Med	Med	Med				High	High	High	High	High	High																															
5			High	High	High	High	Low	High	Med	Med	Med	Med				High	High	High	High	High	High																															
6			Med	Med	Med	Med	Low	High	Med	Med	Med	Med				Low	Low	Low	Low	Low	Low																															
6			Med	Med	Med	Med	Low	High	Med	Med	Med	Med				Low	Low	Low	Low	Low	Low																															
6			Med	Med	Med	Med	Low	High	Med	Med	Med	Med				Low	Low	Low	Low	Low	Low																															
6	Low		Med	Med	Med	Med	Low	High	Med	Med	Med	Med				Low	Low	Low	Low	Low	Low																															
7			Med	Med	Med	Med	Low	High	Med	Med	Med	Med				Low	Low	Low	Low	Low	Low																															
7		Low	High	Low	Low	Low	Low	High	Med	Med	Med	Med				High	High	High	High	High	High																															
7			High	Low	Low	Low	Low	High	Med	Med	Med	Med				Low	Low	Low	Low	Low	Low																															
8			High	Low	Low	Low	Low	High	Med	Med	Med	Med				Low	Low	Low	Low	Low	Low																															
8			High	Low	Low	Low	Low	High	Med	Med	Med	Med				Low	Low	Low	Low	Low	Low																															

Sample: Fiserv Persona/Workflow Matrix

This matrix is a strategic framework I developed several years ago while serving as the sole resource responsible for redesigning all key areas of Fiserv’s Client Central Enterprise Debit Card Suite of Products (see Case Study 4).

It provides a clear, executive-level view of how key product areas align to core personas, highlighting usage concentration, role-based impact, and priority areas for investment.

The framework enabled **data-informed decision-making**, stronger stakeholder alignment, and a focus on critical priorities across the portfolio.

How the Matrix Is Structured

- Header (Top Row):** Key areas of the product
- Left Column:** Personas associated with the product
- Central Grid:** Indicates which persona utilizes each product area and the level of importance to their role (Low, Medium, High)

Persona/Workflow Matrix

COM Rewrite :: Users and Corresponding Tasks/Workflows (All Disciplines)

	Task/Workflow Priority	Administrative Staff	Rehab Technicians	Therapists / Assistants	Rehab Directors (Half treating patients & half reporting)	Rehab Manager (May never treat patients but more reporting info)	Sr. Executive Role (Almost all reporting)	HR/Corporate Administrative (Primarily Administrative Console)
Role Priority		High	High	High	High	Med	Med	Med
Primary Tasks/Workflows								
Intake/Referral Management (OTHH/Clinic)		x	x	x	x	x		
Schedules		x	x	x	x	x		
- Managing Appointments		x	x	x	x	x		
- Projections (Not in Clinic or OTHH)		x	x	x	x	x		
- Assignment Board		x	x	x	x	x		
- Appointment Book		x	x	x	x	x		
- Staff Schedule Templates			x		x	x		x
- Group Management (Group Therapy?)		x	x	x	x	x		
- Patient's Treatment Time Preferences		x	x	x	x	x		
Patient Management		x	x	x	x	x		
- Adjust Payers		x	x		x	x		
- Case Manager		x	x		x	x		
Hot List/Close-Out Management		x	x	x	x	x		
Printing of All Sorts of Things		x	x	x	x	x		
- Patient Docs		x	x	x	x	x		
- Reports		x	x	x	x	x	x	x
Labor Management		x			x	x		
- Time Clock and Labor Log Entry		x	x	x	x	x		x
- Time Clock and Labor Log Management					x	x		x
- Timeclock Admin (in Admin area)					x	x		x
Exports		x	x		x	x		
Messaging/Tasks		x	x	x	x	x	x	x
Administrative Tasks			x		x	x		
- Facility Layout (Not Clinic)		x	x		x	x		
o Wings		x	x		x	x		
o Room and Bed		x	x		x	x		
- Physician Management		x	x		x	x		x
- Contact Management		x	x		x	x		x
o Hospital		x	x		x	x		x
o Referral Sources		x	x		x	x		x
o Patient Contracts		x	x		x	x		x
- Site Calendar		x	x		x	x		
Additional Tasks/Workflows								
Daily Activity Log								
- Patient Billing				x	x			
- TEN				x	x			
Patient Documentation				x	x			
Manage Signatures				x	x			

Net Health Persona/Workflow Matrix Overview

This Persona/Workflow Matrix is adapted from my original Fiserv framework and reflects the current Net Health Clinical Documentation product and its impacted personas. *(Note: Personas and Workflows are inverted from my original version.)*

The matrix maps the product's key workflows to the personas who engage with them, clarifying how each workflow supports or impacts their goals, tasks, and responsibilities.

From a UX perspective, it provides a clear, at-a-glance view of usage patterns, role-based impact, and how critical each workflow is to delivering an effective, efficient user experience.

Copy of Weekly Group Sign Up Sheet Dec 04 - PDF-XChange Editor

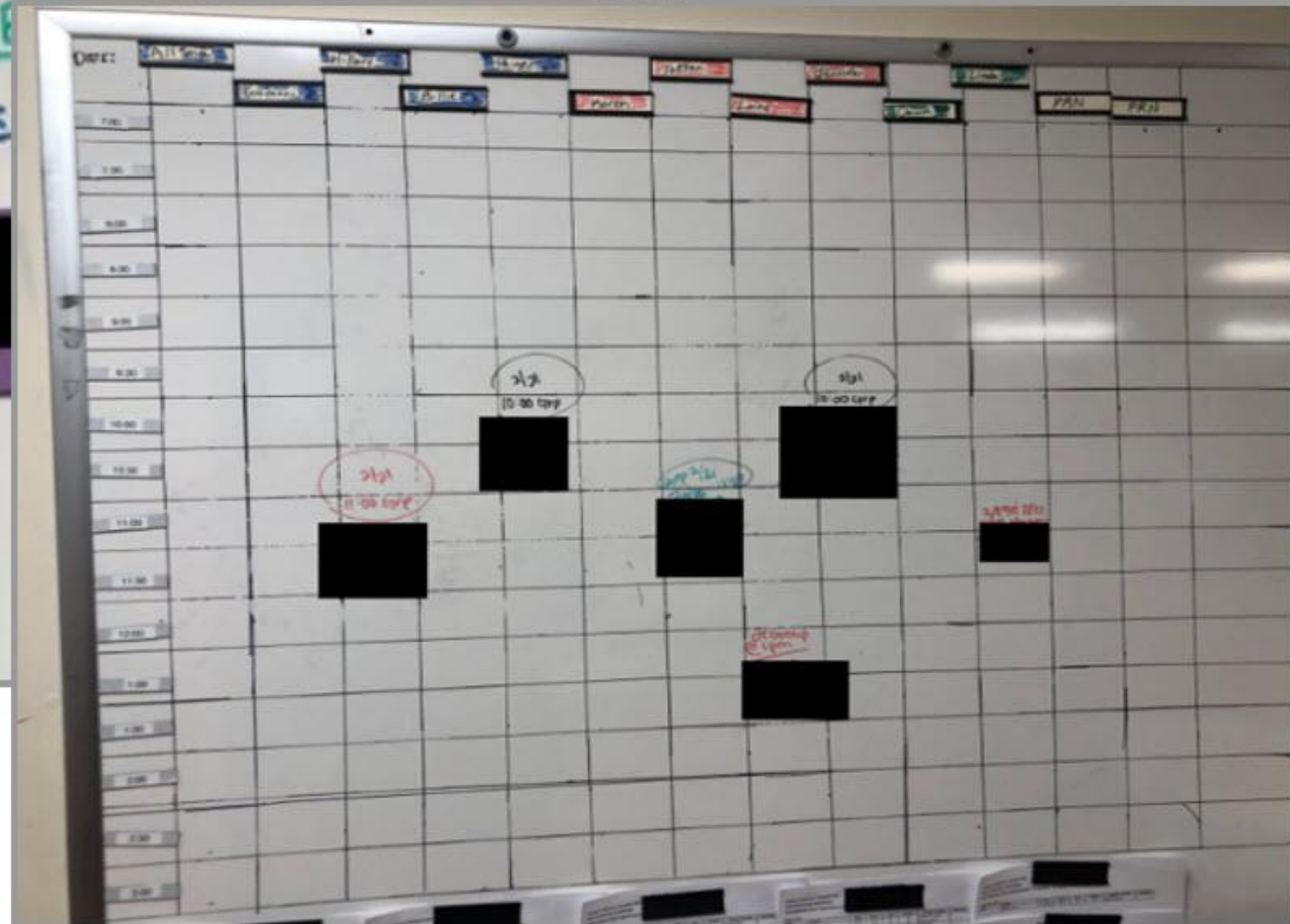
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Copy of Weekly Group Sign Up Sheet

This document contains interactive form fields. Highlight form fields.

WEEKLY GROUP SIGN UP SHEET							
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Date							
Physical Therapy	PT	PT	PT				
Therapist Name							
Type of Group							
Location							
Time							
Patient Names							
Occup Therapy	OT	OT	OT				
Therapist Name							
Type of Group							
Location							
Time							
Patients							

Most users rely on manual, offline methods to manage their Group Management schedules indicating a significant gap in the current product experience. The images shown are real client examples, illustrating how users are creating workarounds outside our current product to meet their operational needs.



Unassigned Appointments

Appointments 49

Evaluation Time 1 hrs 00 mins

Individual Time 0 hrs 00 mins

Concurrent Time 0 hrs 00 mins

Group Time 2 hrs 00 mins

Patient	Time	Mins	Type	Plan	C+
ACOT, D		0	MCA	MM Medicar...	<input type="checkbox"/>
ACOT, U		60	MCA	MM Medicar...	<input type="checkbox"/>
ADuplicate ...		0	MCA	MM Medicar...	<input type="checkbox"/>
AMCB, N		0	MCB	no start/sto...	<input type="checkbox"/>
Anocom, R		0	MCA	MM Medicar...	<input type="checkbox"/>
AnoSSN, P		0	MCA	MM Medicar...	<input type="checkbox"/>
APDPM, D		0	MCA	MM Medicar...	<input type="checkbox"/>
APDPM, G		0	MCA	MM Medicar...	<input type="checkbox"/>
Atest, P		0	MCA	MM Medicar...	<input type="checkbox"/>
AThreelett...		0	MCA	MM Medicar...	<input type="checkbox"/>
Atta, C		0	MCA	MM Medicar...	<input type="checkbox"/>
AzPDPM, B		0	MCA	MM Medicar...	<input type="checkbox"/>
Berlin, P		0	MCA	MM Medicar...	<input type="checkbox"/>
CCMTest, T		0	MCB	Medicare Pa...	<input type="checkbox"/>
Columbia, D		0	MCA	MM Medicar...	<input type="checkbox"/>
Concurrent...		0	MGA	Managed C...	<input type="checkbox"/>
Concurrent...		0	WC	Workers' Co...	<input type="checkbox"/>

Exclude Patients w/o Appointments C+: Concurrent Tx Favorable

Patients in bold are in look-back period Group Treatment Member of Group Session (locked)

Parvathaneni, Padmaja PTIF: 0 hrs 00 mins

4793, P 0 MCA

Burger, B 0 MCA

Missed, V 0 MCA

Mc Alister, David PTIF: 0 hrs 00 mins

Barr, Meghan PTIF: 0 hrs 00 mins

GG, P 0 MCA

Mark, M 0 MCA

Test, M 0 MCB

McAlister, David PTIF: 2 hrs 30 mins

ACOMASSESSM... 0 MCA

ACOT, U 03:00 PM 60 MCA

Brown, D 11:00 AM 60 MCA

Brown, D 0 MCA

GOQ 19, G 01:00 PM 60 WC

Section, G 0 MCA

Kamasamudram, Sowmya PTIF: 0 hrs 00 mins

Jaime, M 0 MCA

OPAC53957, P 0 MCA

Nepomechie, David PTIF: 0 hrs 00 mins

Babb, Alison PTIF: 0 hrs 00 mins

ACOT, D 0 MCA

Hearon, Jeannine PTIF: 0 hrs 00 mins

<right-click to select> PTIF: 0 hrs 00 mins

Net Health Assignment Board Scheduler
 Our scheduling product did not have an easy or efficient way to schedule Group Management Appointment

Group Therapy Management Requirements

Group Therapy

- Allows therapists to treat 2-6 patients at the same time (class-style setting)
- Enables our clients to maximize their profits

Initial Requirements

- Create a new “Group Management” scheduling view
- Capture and display key group attributes
 - Group Name
 - Location
 - Percentage of Group/Concurrent utilization to date (within episodic period)
 - Additional configural fields
- Streamline group scheduling and management
- Deliver meaningful utilization and performance reports

New Group Management Feature (Reflected in Old Product Design)

THERAPYTRUNK - *Optima Therapy Site Optima
 _ □ ×

File View Activities Documentation Administration Window Suspend Session Help

New Patient Patient Record Daily Activity Log E-Signatures Labor Log Appointment Book Assignment Board Hotlist Reports Closeout Change Setting Help Manage Groups

My Workplace **Assignment Board** × Clinician Sort Order: Order of Entry

Refresh PT on 2/28/2020 (Friday) Next Day Next Day Add Delete Sort Name Providers - All Clinicians - List View Auto-Assign Undo All Find View: Caseload

Unassigned Appointments

Appointments: 4
 Evaluation Time: 1 hrs 30 mins
 Individual Time: 0 hrs 00 mins
 Concurrent Time: 1 hrs 00 mins
 Group Time: 3 hrs 30 mins

[+ PreAdmit](#)

Patient	Time	Mins	Type	Plan	G/C	G+	C+
ACOT, D	10:00	60	MCA	MM Medicar...	10%	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ACOT, U		60	MCA	MM Medicar...	10%	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ADuplicate ...		60	MCA	MM Medicar...	0%	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anderson, J		60	MCB	MM Medicar...	10%	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anocom, R		60	MCA	MM Medicar...	10%	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AnoSSN, P		60	MCA	MM Medicar...	0%	<input type="checkbox"/>	<input type="checkbox"/>
APDPM, D		60	MCA	MM Medicar...	30%	<input type="checkbox"/>	<input type="checkbox"/>
APDPM, G		60	MCA	MM Medicar...	10%	<input type="checkbox"/>	<input type="checkbox"/>
Atest, P		60	MCA	MM Medicar...	10%	<input type="checkbox"/>	<input type="checkbox"/>
AThreelett...		60	MCA	MM Medicar...	30%	<input type="checkbox"/>	<input type="checkbox"/>
Atta, C		60	MCA	MM Medicar...	10%	<input type="checkbox"/>	<input type="checkbox"/>
AzPDPM, B		60	MCA	MM Medicar...	10%	<input type="checkbox"/>	<input type="checkbox"/>
Berlin, P		60	MCA	MM Medicar...	0%	<input type="checkbox"/>	<input type="checkbox"/>
CCMTest, T		60	MCB	Medicare Pa...	0%	<input type="checkbox"/>	<input type="checkbox"/>
Columbia, D		60	MCA	MM Medicar...	10%	<input type="checkbox"/>	<input type="checkbox"/>
Concurrent...		60	MGA	Managed C...	20%	<input type="checkbox"/>	<input type="checkbox"/>
Concurrent...		60	WC	Workers' Co...	0%	<input type="checkbox"/>	<input type="checkbox"/>

Exclude Patients w/o Appointments C+: Concurrent Tx Favorable

Patients in bold are in look-back period Group Treatment Member of Group Session (locked)

Other Flower Arrangements 11:00 - 12:00

PT; OT; ST [Edit Group](#)

Description: Lorem ipsum dolor sit amet, ei wisi perpetua pri, in alia eros ius. Pertne qui imperr...

David McAlister PT PTIF: 1 hrs 00 mins

Brown, D	20% G: Flower Arra	11:00 AM
Brown, D	28% G: Flower Arra	11:00 AM
GOQ 19, G	10% G: Flower Arra	11:00 AP
Section, G	5% G: Flower Arra	11:00 AM

Fall Prevention 1:00 - 2:00

PT; OT; ST [Edit Group](#)

Description: Lorem ipsum dolor sit amet, ei wisi perpetua pri, in alia eros ius. Pertne qui imperr...

David McAlister PT PTIF: 1 hrs 00 mins

Biggs, S	20% G: Fall Prevent	1:00 PM
Carpenter, J	28% G: Fall Prevent	1:00 PM
Miller, G	10% G: Fall Prevent	1:00 PM
Zinkin, D	5% G: Fall Prevent	1:00 PM

Pilates Group Class 9:00 - 10:00

PT [Edit Group](#)

Description: Lorem ipsum dolor sit amet, ei wisi perpetua pri, in alia eros ius. Pertne qui imperr...

Sarah Miller PT PTIF: 1 hrs 00 mins

Hardon, P	20% G: Pilates Grou	9:00 AM
Larson, M	28% G: Pilates Grou	9:00 AM
Mallary, R	10% G: Pilates Grou	9:00 AM

Cooking Class 11:00 - 12:00

PT; OT; SY [Edit Group](#)

Description: Lorem ipsum dolor sit amet, ei wisi perpetua pri, in alia eros ius. Pertne qui imperr...

Andrea Richeards PT PTIF: 1 hrs 00 mins

Brown, D	20% G: Cooking Clas	11:00 AM
Brown, D	28% G: Cooking Clas	11:00 AM
GOQ 19, G	10% G: Cooking Clas	11:00 AP
Section, G	5% G: Cooking Clas	11:00 AM

Left Shoulder xxx 11:00 - 12:00

PT, ST [Edit Group](#)

Description: Lorem ipsum dolor sit amet, ei wisi perpetua pri, in alia eros ius. Pertne qui imperr...

David McAlister PT PTIF: 1 hrs 00 mins

Brown, D	20% G: Left Shoulde	
Brown, D	28% G: Left Shoulde	
GOQ 19, G	10% G: Left Shoulde	
Section, G	5% G: Left Shoulde	

Upper Body Strength 11:00 - 12:00

PT [Edit Group](#)

Description: Lorem ipsum dolor sit amet, ei wisi perpetua pri, in alia eros ius. Pertne qui imperr...

David McAlister PT PTIF: 1 hrs 00 mins

New Group Management Feature

By leveraging extensive quantitative and qualitative insights and collaborating closely with clients and stakeholders, I delivered a solution that met or exceeded all expectations.




[Save & Print](#) [Save](#) [Apply](#) [Cancel](#)

New Group Management Feature (Reflected in NEW Product Design)

Assignment Board

◀ ▶
📅 MONDAY, JANUARY 5, 2025
Disc:
PT OT SLP
CASELOAD SUMMARY CALENDAR GROUP

Patient Search

Patient	Doc	Time	Type	Tx Type	Ther	Ttl
<input type="checkbox"/> Ahner, D		6:00	MCA	I:30 C:120	DB	150
<input type="checkbox"/> Bingham, J		10:00	MCA	G: 45	DB	45
<input type="checkbox"/> Davidson, P		10:00	MCA	G: 45	DB	45
<input type="checkbox"/> Edmondson,		10:00	MCA	G: 45	RC	45
<input type="checkbox"/> Frank, O			MCA	I: 30	RC	30
<input type="checkbox"/> Graco, C			MCA	G: 60	RC	60
<input checked="" type="checkbox"/> Hellman, R			MCA	I: 45	RC	45
<input type="checkbox"/> Hellman, R			MCA	G: 60	RC	45
<input type="checkbox"/> Thompson,			MCA	I: 30	RC	30
<input type="checkbox"/> Zinkin, D			MCA	I: 90	RC	90
<input type="checkbox"/> Zander, M			MCA	I: 90	RC	90

Cooking Class 9:00 - 10:00 PT, OT, SLP Edit Group	Fall Prevention Class 10:30 - 11:30 PT, OT, SLP Edit Group	Fall Prevention Class 2:00 - 3:00 PT, OT, SLP Edit Group
Provides various techniques and skills for patients with beginner to advanced... Jack Heininger, PT PTIF: 60 mins	Provides key information and techniques to help patients reduce their risk of falling... Ralph Schleicher PTA PTIF: 60 mins	Provides key information and techniques to help patients reduce their risk of falling... Dr. Robert Clark PT, OT PTIF: 60 mins
Hardon, P 20% G: Pilates Group 10:00 AM Larson, M 26% G: Pilates Group 10:30 AM Binden, S 10% G: Pilates Group 10:30 AM	Jackson, P 20% G: Fall Prevention 10:00 AM Smith, M 22% G: Fall Prevention 10:30 AM Baker, P 10% G: Fall Prevention 10:30 AM Jordan, D 10% G: Fall Prevention 10:30 AM	Pearson, J 20% G: Fall Prevention 10:00 AM Dukes, M 28% G: Fall Prevention 10:30 AM Zinkin, D 10% G: Fall Prevention 10:30 AM Pike, T 10% G: Fall Prevention 10:30 AM Rensi, D Palmer, J
Floral Arrangement Class 9:00 - 10:00 PT, OT, SLP Edit Group	Pilates Group Class 9:00 - 10:00 PT, OT, SLP Edit Group	Upper Body Strength 11:00 - 12:00 PT, OT, SLP Edit Group
Promotes patients to get involved in using their hands and discussing different... Rita Cole PT, SLP PTIF: 60 mins	Provides patients with a supportive and personalized fitness experience... David McAlister PT PTIF: 60 mins	Provides a robust, full-body workout with expert coaching, focusing on slow... Dustin Bishop PT PTIF: 1:00 mins
Parker, P 20% G: Floral Arrange 9:30 AM Simons, J 21% G: Floral Arrange 9:30 AM Bingham, S 10% G: Floral Arrange 9:30 AM Palmdale, J 20% G: Floral Arrange 9:30 AM Larson, M 31% G: Floral Arrange 9:30 AM James, S 10% G: Floral Arrange 9:30 AM	Minton, K 20% G: Pilates Group 9:00 AM Peters, M 16% G: Pilates Group 9:00 AM Sanfor, J 10% G: Pilates Group 9:00 AM Tullis, S 20% G: Pilates Group 9:00 AM Jarek, M 38% G: Pilates Group 9:00 AM	Marx, S 20% G: Upper Body 11:00 AM Budman, J 16% G: Upper Body 11:00 AM Ademick, C 10% G: Upper Body 11:00 AM Sorenson, C 20% G: Upper Body 11:00 AM Wagner, D 38% G: Upper Body 11:00 AM Schreifels, S 28% G: Upper Body 11:00 AM














Outcomes

Streamlined our group therapy management process

- Created simple, user-centric designs for viewing and managing all group therapy sessions

Reduced clicks for scheduling group therapy by 87%

(Average of 4-patients per group; each patient will now inherit all appointment attributes)

- Original design = 60 clicks
(24 clicks for scheduling + 36 clicks for entering appointment attributes for each patient)
- Enhanced design = 8 clicks

Provided Significant Client Benefits

(Incorporated multiple critical features)

- Maximized their Medicare reimbursements
- Incorporated multiple non-group therapy “quick win” features
- Enable them to better manage several aspects of their business

Post-Project Client & Stakeholder Review

How did we do?

4.7



Product and Engineering

- Primary stakeholder
- Engaged throughout all phases of a project

Client Partners (Primary Focus)

- Conduct client workshops to understand user problem and needs
- Create, iterate, and refine designs, often with additional clients as more are engaged

Other Internal Stakeholders

Sales, Implementation & Training, Support Client Success, Compliance, Education, more