Homepage, Navigation, and Masthead Redesign

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Project Overview

The product:

The ePortal is a secure web-based platform that enables providers, administrative staff, and system admins to manage essential healthcare operations such as authorizations, claims, credentialing, and configuration. It supports over 100,000 users across 43 counties and is critical for both daily operations and scalable long-term growth.

Project duration:

May 2024 – January 2026
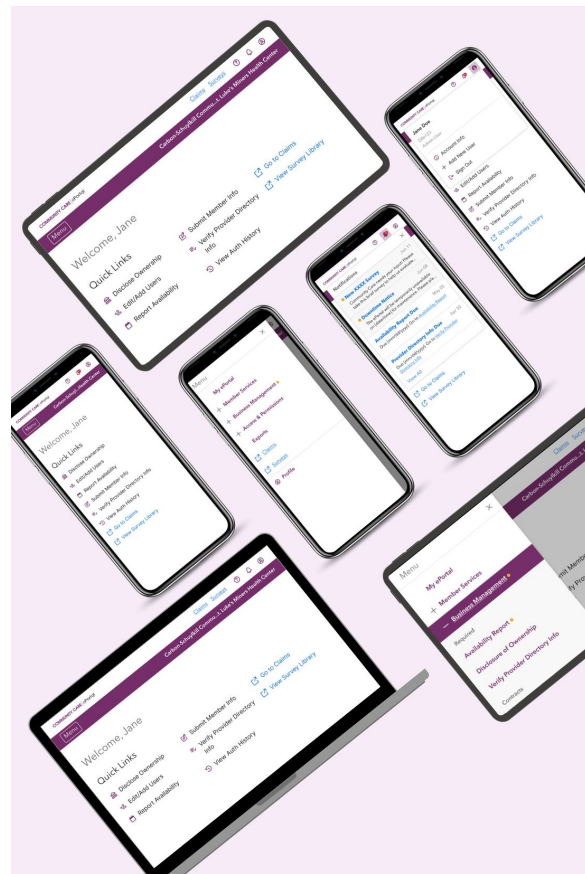
Project Overview

The problem:

The existing homepage, masthead, and navigation created confusion, slowed task efficiency, and increased reliance on the help desk. Users struggled with unclear permissions, vague alerts, and disorganized pathways to complete critical actions.

The goal:

Redesign the homepage, masthead, and navigation to create a more intuitive, scalable experience that reduces friction, accelerates task completion, lowers onboarding barriers, and decreases support requests.

Project Overview

My role:

One of three UX designers; one of two UX researchers

Responsibilities:

My responsibilities included user research, persona development, wireframing, prototyping, user testing, A/B testing, accessibility reviews, QA reviews, and final design delivery to stakeholders.

Understanding the User

- User Research
- Pain Points
- Competitive Audits
- Card Sorting
- Problem Statements

User Research: Summary

I conducted competitive audits, user interviews, card sorting workshops, and two rounds of A/B moderated studies. These actions helped lead me to understand how different user groups navigated the ePortal Homepage, Navigation, and Masthead.

The first assumptions were that users wanted extensive customization, however further research revealed a stronger need for clarity, predictability, and guided paths. These findings directly shaped the navigation categories, homepage priorities, and alert systems that we would implement.

User Research: Pain Points

1

Confusing Navigation

Users struggled to locate tasks, resulting in delays. This guided the redesign of the navigation hierarchy.

2

Overwhelming Alerts

Notifications were vague or cluttered. This led to a streamlined and prioritized alert system in the redesign.

3

Unclear Permissions

Admin and operator roles overlapped in confusing ways. We refined role-based flows in the redesign.

4

Lack of Onboarding Guidance

New users had difficulty learning system tasks. The homepage was redesigned for orientation and quick-start tasks.

User Research: Competitive Audits Takeaways

1

Quick Access to Key Features

Optimize users' workflow and productivity by prioritizing functions or features that are most frequently used.

Vaya Health   PerformCare

Magellan Healthcare

2

Prominent Feedbacks or Help Options

As the user base diversifies, it is increasingly critical to ensure feedback forms, relevant FAQs, or contact information for particular support personnels are accessible from the home page.

PerformCare

Magellan Healthcare

3

Relevant and Concise Content

Avoid overwhelming the home page with excessive information. Instead, highlight key information, group functions based on workflow, and gradually introduce guidelines or timely information as users perform each task.

Vaya Health

User Research: Card Sorting

Card sorting confirmed existing category structures while revealing new categories based on participant perceptions, informing updates to the navigation and content structure on the ePortal.

Findings for Providers

1. Provide action-driven terminology and relevant navigation grouping.

2. Spotlighting support-related navigation for easy access.

3. Reducing duplicated flows and adopting one intuitive user flow.

4. Clarifying the features and modules within the ePortal with better labels or regrouping.

Findings for Admins

1. Organizing Admin features into contextual categories and guidance on Admin features.

2. Granting Admins editing access to reduce internal maintenance on surveys.

3. Granting Admins user emulation functionality to aid provider in internal troubleshooting.

User Research: Problem Statements

After conducting initial market research and completing workshops through cross-team collaboration, we revised the problem statements to aid in our phased design approach.

1 **Providers:**
- <u>I am</u> a provider with administrator permission (FA/PFA)
- <u>Trying to</u> manage my teams permissions, access, and verify credentialing/contracting information
- <u>But</u>
  - Team members are unclear about their permissions/tasks
  - It's hard to track and submit information
  - Sometimes toggle into the wrong facility
- <u>Which makes me feel</u> slightly frustrated, as I am already juggling a lot of admin work

2 **Provider Generic:**
- <u>I am</u> a provider with assigned permissions
- <u>Trying to</u> submit authorizations, reports and claims (frequently performed tasks)
- <u>But</u>
  - Have trouble locating user manuals
  - Unsure why I have been granted certain access (to facilities/tasks work/etc)
  - Alerts don't apply to me
  - Submit Claim ticket to tech support instead of Provider Online
- <u>Which makes me feel</u> disoriented, as I am not always sure what task to prioritize or if actions are needed

Starting the Design

- Mental Models
- Digital Wireframes
- Tree Testing + Analysis
- Low-fidelity Prototypes
- A/B Testing

Mental Models: Overview

These models are based on users' current behavior, prior experience with similar projects, and insights from user interviews.

1 **The Operator:**

Operators are somewhat familiar with the ePortal. They are **methodical thinkers** and value standardization over customization:

- Routine driven
- Prefer familiar but efficient navigation

2 **The Explorer:**

Explorers are new users or early adopters of a new feature. They are **investigative thinkers** and value customization over standardization:

- Task oriented
- Prefer guidance to inform selections

The Operator Wireframes: Provider View

The Operator features include:

- Fat navigation when clicking on menu items with sub-pages
- Quick links appear on the homepage
- Updates and alerts accessible on the homepage
- Entity toggle now in the masthead to easily switch entities
- Iconography to catch user's attention; eg. Profile and Help
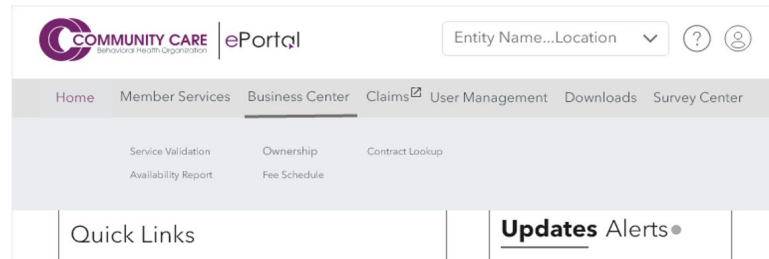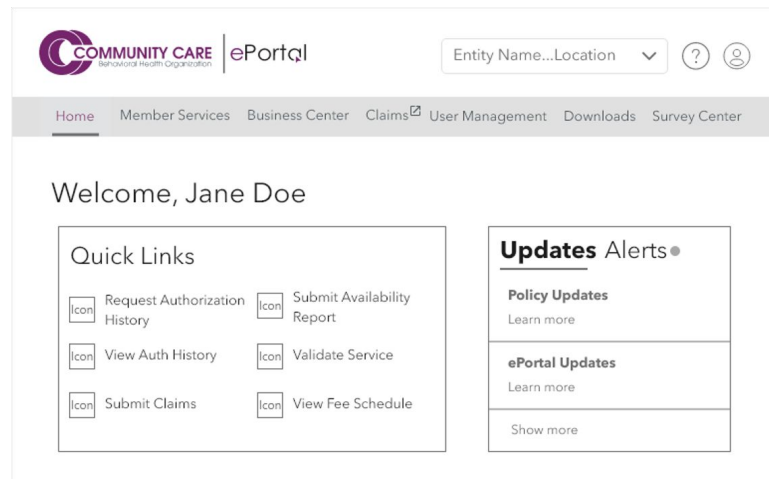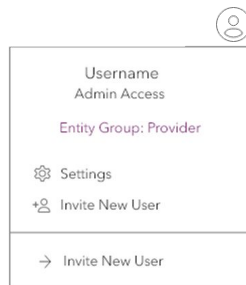
The Operator Wireframes: Provider with Sys Admin View

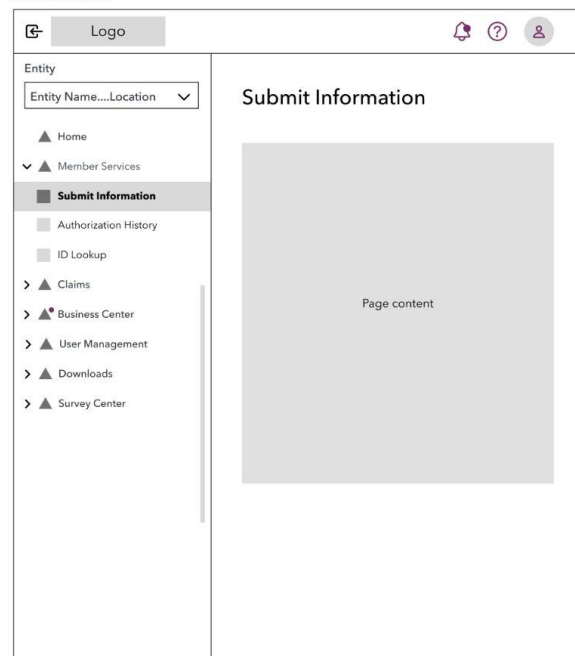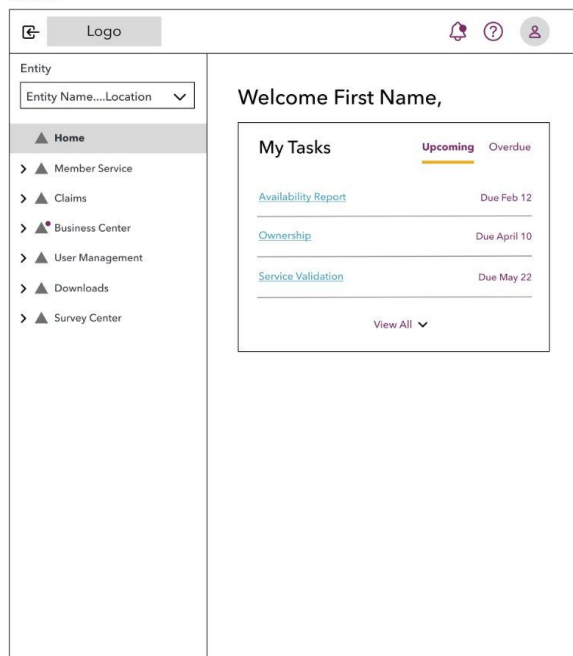**The Operator features for Admins include:**

- Easier access to emulate entities; large exit button when emulating

- Frequent admin tasks appear as quick links on homepage

- Admins can switch users effectively through profile dropdown
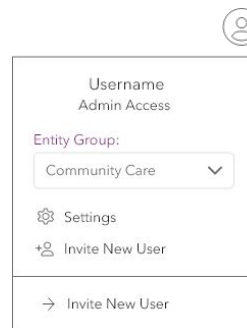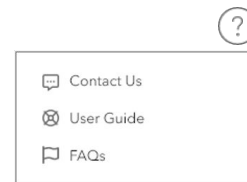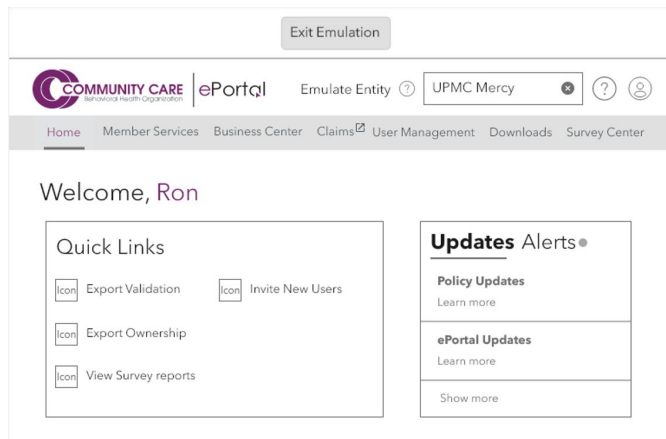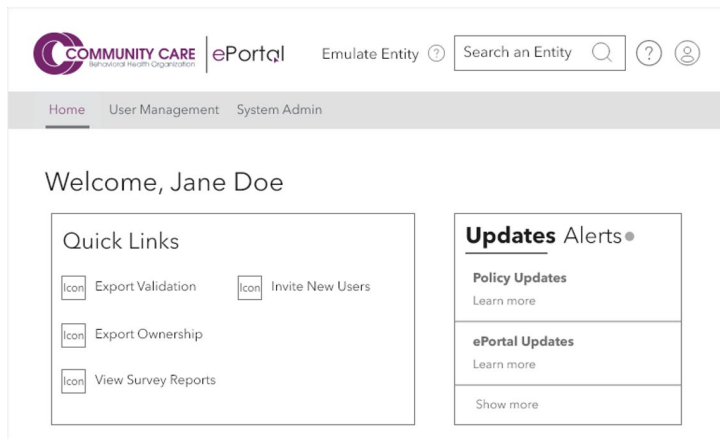
The Explorer Wireframes: Provider View

The Explorer features include:

- Expand/collapse side menu
- Entity toggle in the menu sidebar
- Quick updates with links to page
- Cleaner task-oriented homepage

The Explorer Wireframes: Provider with Sys Admin View

The Explorer features for Admins include:

- Emulate entities dropdown moved to menu sidebar with optional guidance through help icon

- Large exit button with fill color, highlighted profile icon,and highlighted user's name to catch admin's eyes in emulation

- Entity selection dropdown moved to menu sidebar
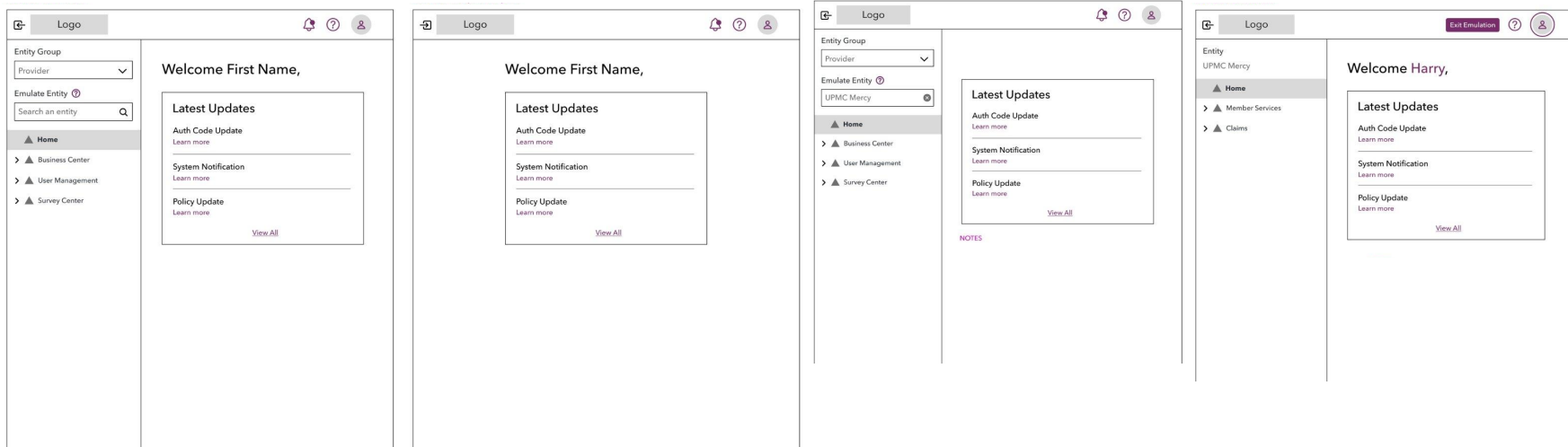
User Research: Tree Testing

Once the wireframes were complete, user interviews were conducted through Optimal Workshop to collect feedback on proposed navigation labels and groupings ensuring our IA is intuitive.

Tree Testing Methodology

- ePortal Alert utilized to recruit users varying in entities and permissions

- Information Structure Tree for testing was created

- Unmoderated testing conducted through Optimal Workshop, 101 participants

- Tree Testing analysis solidified need to revise A/B testing sitemap and navigation

Tree Testing Analysis

1 Information structure and language is provider-friendly

2 Minor tweaks needed in location, naming, and regrouping for Authorization, Service Validation, and Ownership

3 Potential notification contents are suggested to include system/feature/task updates (58.5%) and to include provider alerts (42.6%)
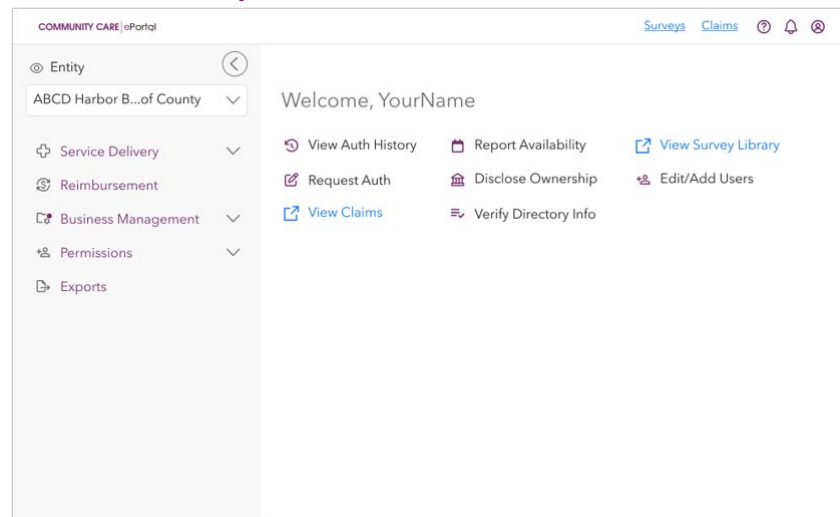
Testing Prototype: Provider User (Admin)

Testing Goal: Understand users' preference and why they chose them. This obtains proof of concept prior to investigating resource in product development. This testing included 7 provider participants.
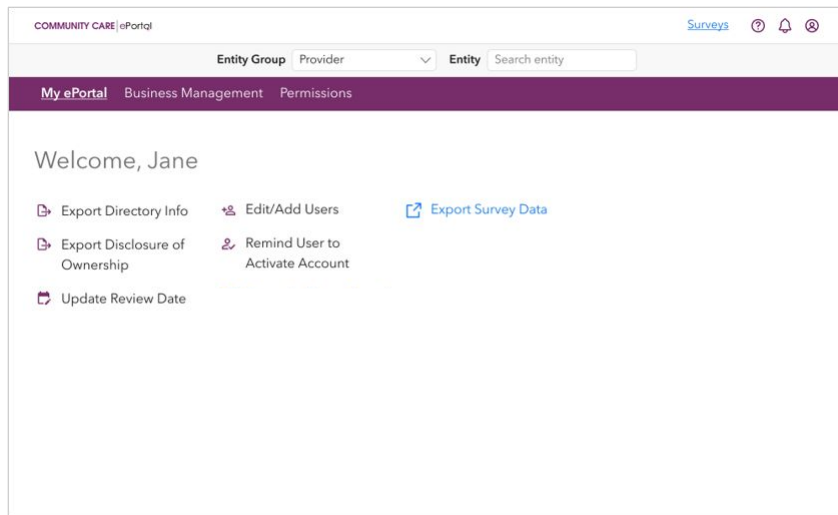
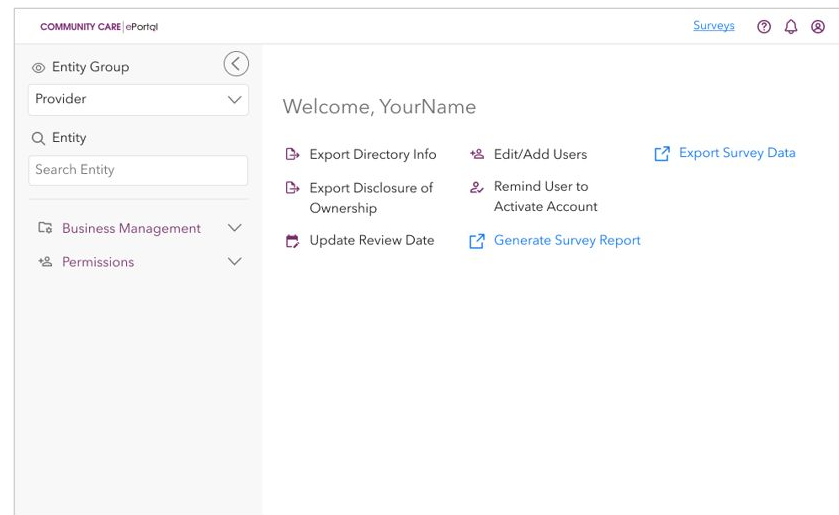## Version A - Operator
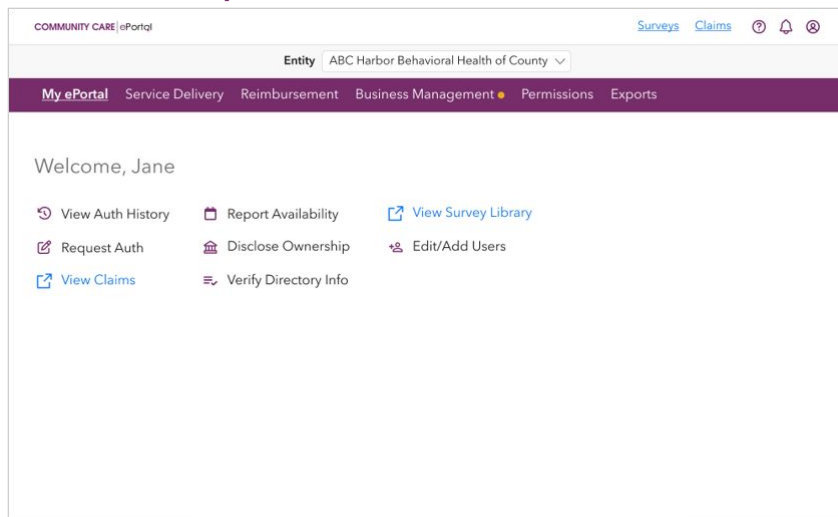
Version B - Explorer

Testing Prototype: Community Care User (Admin)

Testing Goal: Understand users' preference and why they chose them. This obtains proof of concept prior to investigating resource in product development. This testing included 4 Community Care participants.
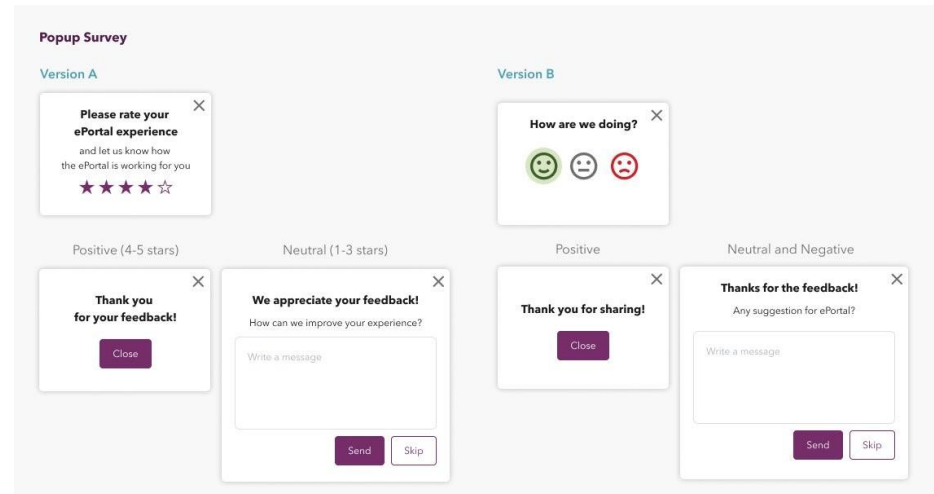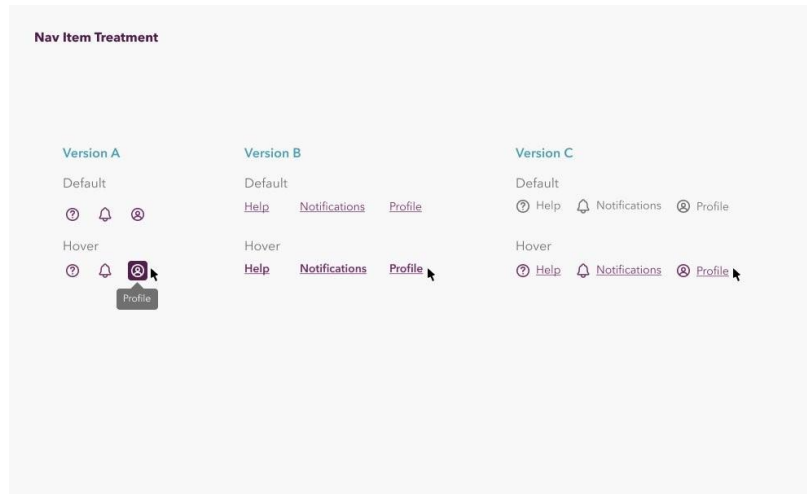
Version A - Operator

Version B - Explorer

Testing Prototype: Nav Treatment + Popup Surveys

Testing Goal: Compare 2-3 options and determine which one is preferred. Success is judge by the numbers. This testing included 11 participants.

Testing Results: Bottom Line

Both HNM design options scored high in task completion rate, with 90.4% for Version A and 84.6% for Version B

1 **Tech Literacy + Familiarity:** Providers with basic tech skills and somewhat familiar with the ePortal prefer Version A (5 out of 7)

2 **Quick Links:** Participants easily adopted quick links, however there was confusion with how permissions affect the links to main features

3 **Language:** For new or less active users, they were unclear on terms, like "Service Delivery" or "Exports"

4 **Usability:** Participants appreciated the mega nav's hover state and tabbed design (Version A) but found the left panel less cluttered and more intuitive when switching entities (Version B)

5 **Icon Treatment:** Participants (3 out of 7) preferred text + icon treatments, raising concerns with team's recognizability with only icons

6 **Guidance for transition:** Participants expressed concerns about the scale of the redesign and its potential impact

Next Steps: Revise Version A

Once results were reviewed with the business and development teams, it was decided that Version A would be revised and built out for the final prototype.

Revisions to be made to Version A

1. **Usability:** Offer two paths to navigate to user account

2. **Icon Treatment:** Use text + icon treatment to build familiarity and confidence

3. **Quick Links:** Add a Quick Links title for clarification and group links by associated nav items

4. **Nav Layout:** Entity dropdown blends in with the background and needs to be updated.

5. **Language:** Update language to be less ambiguous for some navigation items and quick links

Project Goals: Research Recap

Business Needs:

- Scalable home page and navigation to accommodate future features
- Reduce help tickets and improve triage for external platform issues

System Needs:

- Overdue 1.0 to 2.0 system update
- Styling and component update to ensure brand consistency

User Needs:

- Scalable homepage and navigation based on permissions and tasks
- Minimal learning curve to support variety of tech literacy levels
- Clear language and guidance to familiarize with features
- Easy, timely access to Help and User Manuals
- Effective reminder for compliance with reporting and submissions

Refining the Design

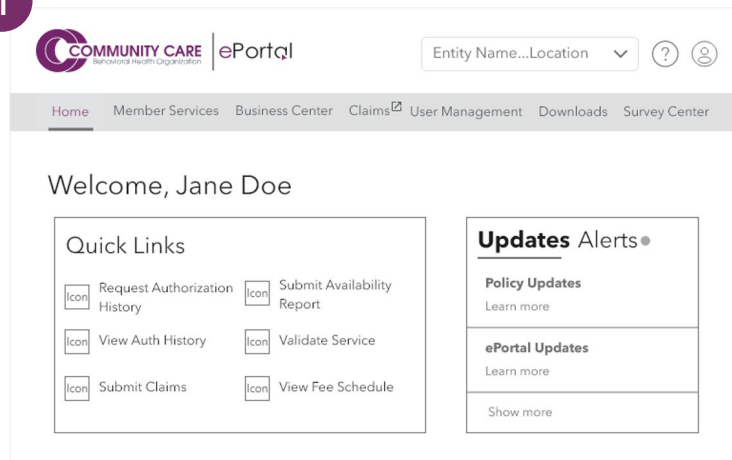- Mockups
- High-fidelity Prototype
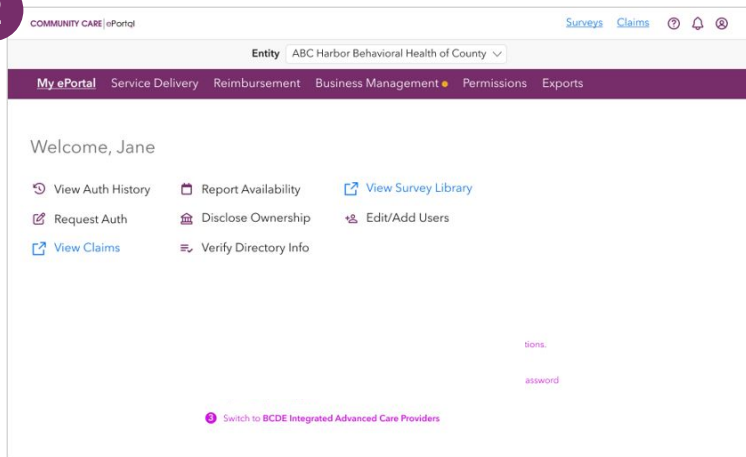- Accessibility

Phased Approaches: Version A

Take a look to see how the mockups changed from one phase to the next:

1. Before Tree Testing
2. Before Usability Study
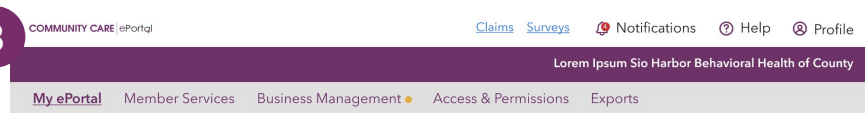3. After Usability Study + Final Design

Hi-Fidelity Mockups: Large Devices

Revisions include:

1. Add Quick Links Header
2. Grouped quick links based on functions/tasks
   a. Updated language for some items to be less ambiguous; eg "Report Auth" updated to "Report Appointment Availability"
3. Implement Icon + Text for user familiarity
4. Updated entity group dropdown to purple background with white text
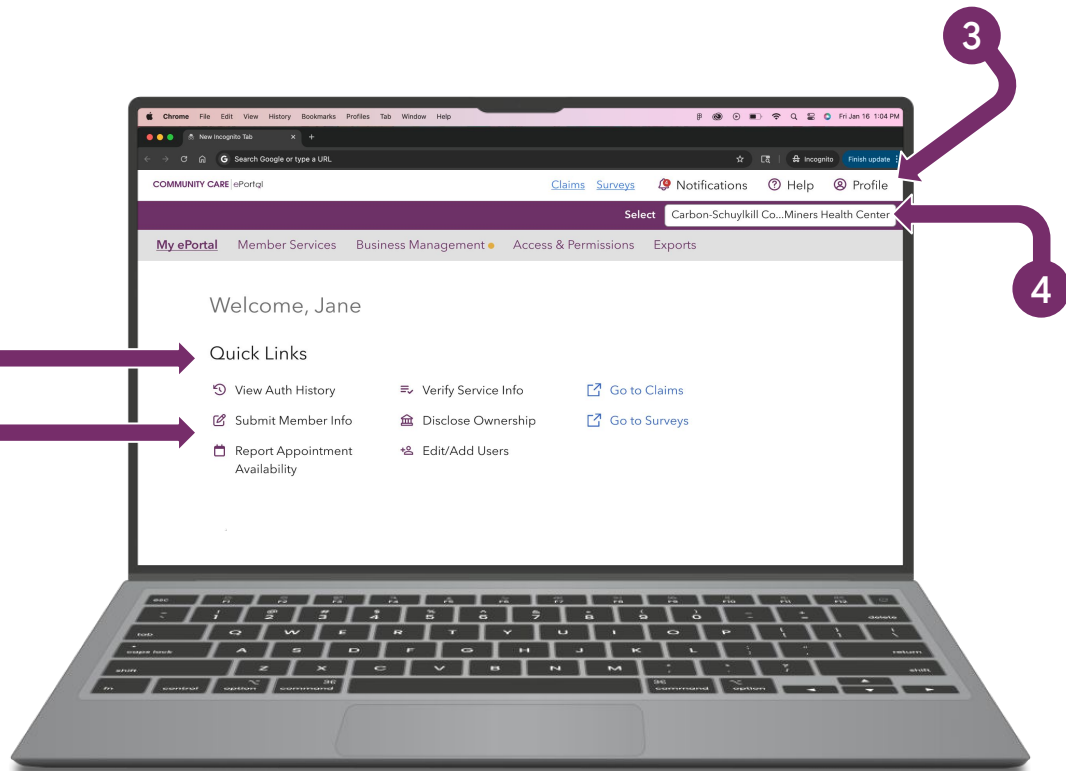
High-Fidelity Mockups: Small Devices
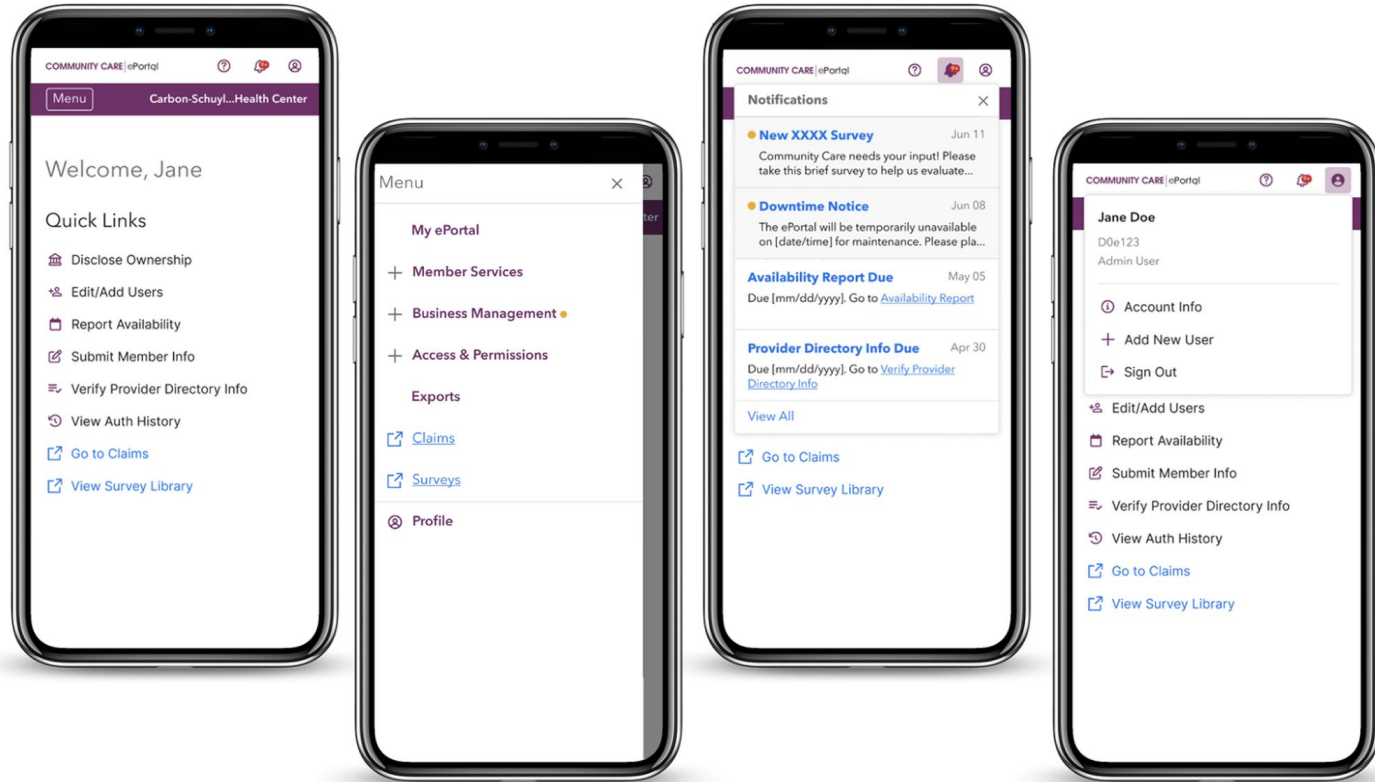
Accessibility Considerations

1

Ensured WCAG-compliant color contrast across the whole homepage, navigation, masthead and alerts.

2

Provide development of keyboard tabbing to the navigation to support completion of tasks. Design team to suggest order and priority of tabbing items.

3

Added descriptive labels and alt text for assistive technologies.

Going Forward

- Takeaways
- Next Steps

Takeaways

Impact:

The redesign reduced navigation confusion, clarified homepage tasks, and improved onboarding. Study participants noted faster task completion and a stronger sense of system clarity.

What I learned:

I learned the importance of balancing familiarity with innovation; small, strategic changes to navigation and homepage structure can have an large impact on usability and efficiency. In addition, I learned how to navigatie cross-team collaboration, especially in frustrating times, and how to work through for the betterment of the team, business, and product.

Next Steps

1

Expand redesign to include full claims and credentialing workflows.

2

Introduce advanced search and filtering in navigation, like a search bar to find specific flows/tasks.

3

Conduct additional user studies and implement surveys to measure efficiency gains and aid the help desk in reducing tasks.

Let's Connect!

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