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ASSISTPOINT TASKING CASE STUDY

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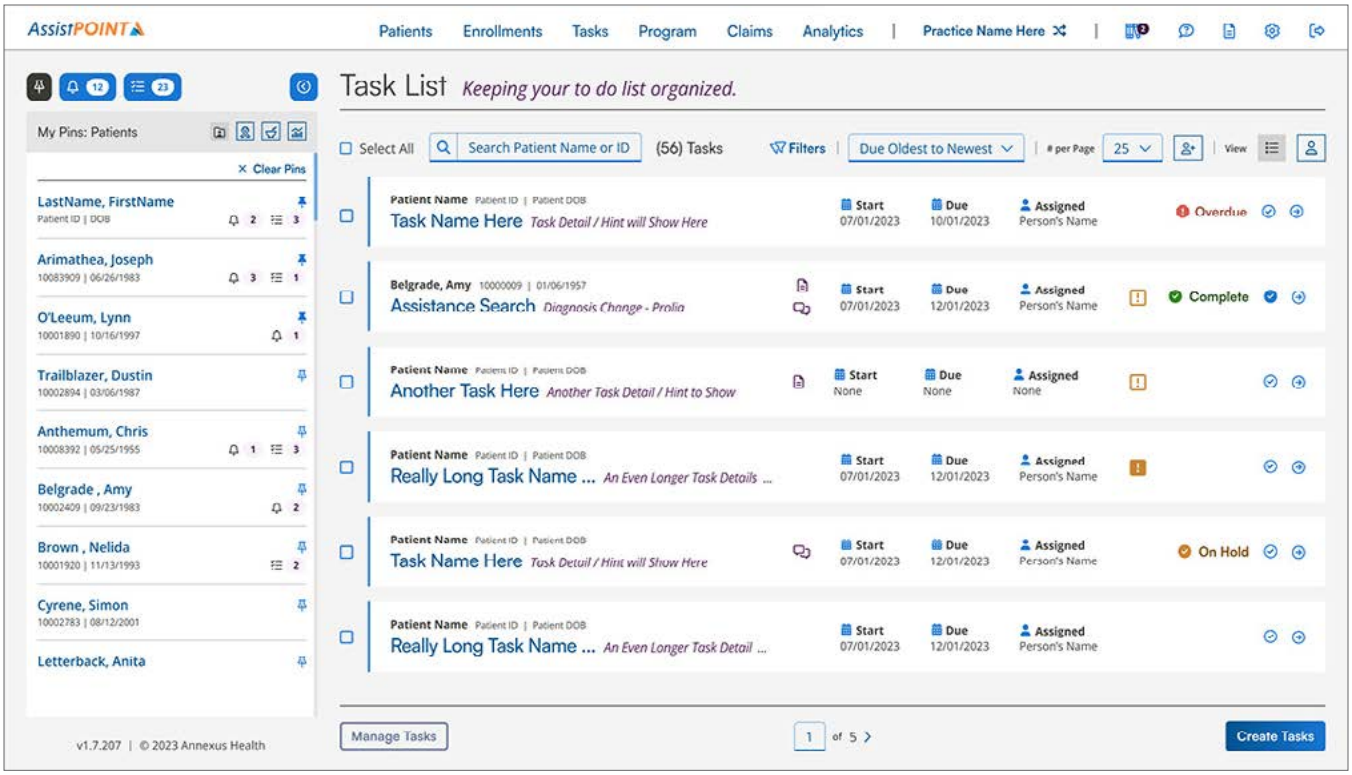

AssistPOINT

ASSISTPOINT TASKING FEATURE:
FROM CONCEPT TO FLAGSHIP FEATURE

Project Overview

This case study examines the development of the tasking feature for AssistPoint, a cloud-based SaaS platform that streamlines the management of financial assistance for patients with cancer and other serious illnesses. The tasking system began as an internal request but evolved into a flagship feature that significantly enhanced platform usability across all user types.

Project: Development of an Integrated Tasking System for AssistPoint

Client: Annexus Health

Role: Product Design Lead

Timeline: 18+ months (with phased implementation)

Team: Cross-functional teams, leadership, and stakeholders from both internal Adparo team and client organizations managers

Defining the Problem

Prior to implementing the tasking feature, AssistPoint users faced several challenges:

- **Lack of Workflow Visibility:** Managers had limited insight into what team members were working on and their progress
- **Process Fragmentation:** No standardized way to track patient assistance applications through the complete lifecycle
- **Manual Follow-Up:** Users relied on separate systems, notes, or memory to follow up on pending tasks
- **Inefficient Communication:** Notifications lacked clear distinction between informational updates and required actions
- **Workload Management:** Difficult to prioritize and assign work efficiently across team members
- **Process Inconsistency:** Lack of standardized workflows led to varying approaches and missed steps

These challenges were especially pronounced for the Adparo team, Annexus Health's internal service arm that acts as an extension of clients' financial departments, prompting the initial request for a task management solution

Research & Discovery

The research process revealed important insights that shaped the development approach:

- **Dual User Base:** We identified two distinct user groups with overlapping but different needs:
  - *Internal Adparo team members who needed better workflow management and visibility with practice based teams*
  - *Client practice users who needed task tracking for their own financial assistance processes*
- **User Interviews:** Consultations with the Adparo team manager revealed the need for better control and visibility of team activities by providers, while client stakeholders expressed similar needs for their own practice workflows
- **Competitive Analysis:** Explored task management approaches in healthcare software and general productivity tools to identify best practices and opportunities for innovation
- **Workflow Mapping:** Documented existing patient assistance workflows to identify key points where task creation, assignment, and tracking would provide the most value
- **Integration Requirements:** Assessed how the tasking system needed to connect with existing AssistPoint features and data to create an integrated experience

Key Insights:

While our two user bases need a similar feature, the purpose of each was different. One sided needed to connect two different teams to allow better communication and workflow, while the other needed it to create a workflow. This meant the system needed to be flexible to fit different situations.

Design Process

The design process for the tasking feature followed a user-centered approach that addressed both immediate needs and future expansion:

Initial Concept Development

- Created user stories and requirements that addressed both Adparo team and client practice needs
- Developed workflow diagrams showing how tasks would flow through the system
- Designed initial wireframes for task creation, assignment, and tracking interfaces

MVP Feature Definition

When the timeline was unexpectedly cut in half, we strategically reevaluated our approach:

- **Prioritized features** into “do now” and “future release” categories
- **Focused on backend infrastructure** that would support both immediate needs and future expansion
- **Selected core features** that would deliver immediate value to the Adparo team while laying groundwork for broader implementation

System Architecture Design

The task management system was built with several key components:

- **Task Types:** Created a customizable task type system allowing managers to define tasks that fit their specific workflow needs
- **Assignment System**: Developed flexible assignment capabilities (manual and automated)
- **Event-Driven Task Creation:** Designed a system where application events could automatically trigger relevant tasks
- **Task Workflow Sequences:** Created the foundation for linked task sequences that would guide users through complex processes
- **Permissions System:** Implemented role-based permissions determining who could create, assign, and complete different task types

User Interface Design

- Designed task creation interfaces that balanced simplicity with flexibility
- Created list and pateint based views for task list with various filtering and sorting capabilities
- Developed dashboard components showing task status, assignment and due date
- Designed notification components that clearly distinguished between actions and information

Project Road Bump:

After starting the project, the need for this feature by Adparo became detrimental to their success. As a key operation for Annexus, we needed to prioritize this project for Adparo. This resulted in our time frame being cut in half, leaving us to change our project road map and redefine our MVP.

Do Now Timeline: 6 months

Future Release Timeline: 12 months

Design Must Have:

Flexibility was the name of the game here. Our user groups are pretty evenly split about how they work. So, we needed to create a user interface that could fit most work styles while maintaining simplicity and consistency.

Iterative Refinement

Iterative Refinement

Phase 1: Adparo MVP - “Do Now”

- Implemented core tasking functionality for the Adparo team
- Focused on basic task creation, assignment, and tracking

- Established the backend foundation for future expansion
- Collected user feedback to inform future development

Phase 2: Full Platform Implementation - “future release”

- Expanded the tasking system to all AssistPoint users approximately one year after initial implementation
- Enhanced functionality based on learnings from Phase 1
- Added more sophisticated automation capabilities
- Integrated more deeply with other AssistPoint features

Addressing Unexpected Challenges

During testing, we encountered an important issue: when the system was first enabled for a practice, it automatically created thousands of tasks based on existing patient data, overwhelming users. We solved this by:

- Redefining task qualification criteria to focus on active, eligible patients
- Creating a phased approach to task generation for existing patients
- Implementing enhanced filtering and prioritization tools
- Adding robust task management controls for administrators

Final Solution

The completed tasking system became a comprehensive workflow management tool with several key components:

Core Components

- **Custom Task Types:** Allowed managers to create task types that fit their specific workflow needs
- **Dynamic Assignment:** Tasks could be manually assigned or automatically routed based on configurable rules
- **Event-Driven Tasks:** System events (like patient updates or funding availability) automatically created relevant tasks
- **Task Workflows:** Predefined sequences of tasks guided users through complex processes like new patient onboarding
- **Integrated Dashboard:** Provided visibility into task status, workload distribution, and completion metrics

Key Innovations

- **Intelligent Task Creation:** Automated tasks based on patient information and program requirements, helping users identify assistance opportunities they might otherwise miss
- **Task Type System**: Customizable task categories that could be tailored to specific team needs and workflow requirements
- **Event-Task Separation:** Clear distinction between notifications (FYIs) and tasks requiring action, reducing confusion and improving follow-through

A simple tasking feature request becomes a comprehensive workflow management tool for all AssistPoint users. This feature fundamentally changes how the product works. Everything from user flows to information and process architectures. It has been a game changer that has increased user efficiency and usability within the application.

- **Workflow Sequences:** Linked tasks that trigger sequentially as previous steps are completed, ensuring consistent process execution
- **Dynamic Assignment Rules**: Sophisticated routing logic that automatically assigned tasks to the right people based on role, department, or expertise

Results & Impact

The tasking system delivered significant value to AssistPoint users:

- **Improved Visibility:** Managers gained clear insight into team member activities and workloads
- **Enhanced Efficiency:** Automated task creation and assignment reduced manual coordination
- **Process Standardization:** Workflow sequences ensured consistent handling of patient assistance applications
- **Reduced Follow-Up Time:** Event-driven tasks alerted users immediately when action was needed
- **User Satisfaction:** The feature became highly requested for enhancements, showing strong user engagement

A Good Measure of Success:

Users began using the task system for office tasks beyond AssistPoint's core functionality, indicating strong adoption and utility. Giving insights into new product lines and expanding ideas of AssistPoint capabilities.

Lessons Learned

The development of the AssistPoint tasking system provided valuable insights:

- **Forward-Compatible Design:** Designing backend infrastructure to accommodate future needs, even when delivering a limited MVP, reduced rework and accelerated later development
- **User Base Expansion:** Looking beyond the initial requestor to identify all potential beneficiaries significantly increased the feature's impact
- **Phased Implementation:** Starting with a focused user group allowed for testing and refinement before broader rollout
- **Expectation Management:** Careful planning of how existing data would interact with new features was essential to prevent overwhelming users
- **Feature Evolution:** What began as a utility feature evolved into a flagship capability that enhanced the entire platform's value proposition

Next Steps

Following the success of the tasking system, several enhancements were planned:

- **Advanced Analytics:** Deeper reporting on task completion times, bottlenecks, and team performance

- **AI-Assisted Task Prioritization:** Smart recommendations for task priority based on impact and urgency
- **Enhanced Automation:** More sophisticated rule creation for task generation and assignment
- **Mobile Access:** Task management capabilities on mobile devices for on-the-go updates
- **Extended Integration:** Deeper connections with practice management systems and other healthcare platforms

Conclusion

The AssistPoint tasking system exemplifies how a well-designed workflow feature can transform a specialized healthcare platform from a data management tool into a comprehensive workflow solution. By addressing both immediate needs and future requirements, the design created lasting value that continues to evolve with user feedback and healthcare industry changes.

This project demonstrates the importance of thinking holistically about feature development—considering all potential users, planning for future expansion, and building flexible foundations that can grow over time. What began as a targeted request for better team management evolved into a core platform capability that enhances the entire patient financial assistance process.