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ASSISTPOINT CASE STUDY

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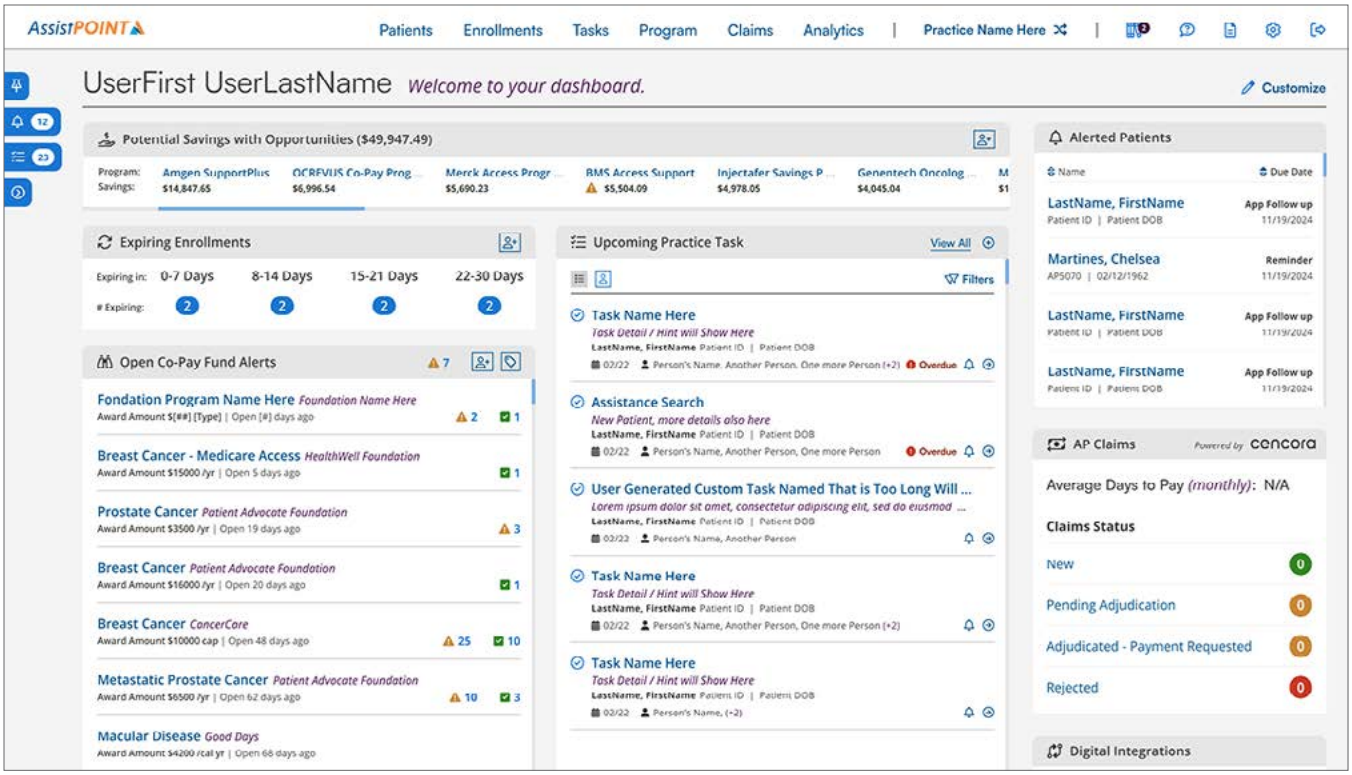

AssistPOINT

ASSISTPOINT BY ANNEXUS HEALTH:

TRANSFORMING PATIENT FINANCIAL ASSISTANCE

Project Overview

As Product Design Lead at Annexus Health, I spearheaded the redesign and enhancement of AssistPoint, a cloud-based SaaS platform that streamlines the management of financial assistance for patients with cancer and other serious illnesses. The platform helps healthcare providers connect patients with financial resources from foundations and life science programs.

Project: AssistPoint SaaS Platform Redesign

Client: Annexus Health

Role: Product Design Lead

Timeline: September 2022 - January 2025

Team: Cross-functional team of designers, developers, product managers, and stakeholders

Defining the Problem

Before the redesign, healthcare providers faced significant challenges in helping patients access financial assistance:

- Managing patient assistance was time-consuming and labor-intensive, involving multiple portals, spreadsheets, and manual processes
- Financial counselors struggled to keep track of numerous assistance programs across different foundations and pharmaceutical companies
- The complex, fragmented process created delays in patient treatment and increased administrative burden
- The existing interface lacked intuitive design, making it difficult for users to efficiently navigate the system
- Limited usability resulted in lower adoption rates and user satisfaction

These issues not only impacted operational efficiency but also directly affected patient care, as delays in securing financial assistance could lead to delays in critical treatments.

Research & Discovery

To gain comprehensive insights into user needs and pain points, I implemented a multi-faceted research approach:

- **User Interviews**: Conducted extensive interviews with financial counselors, administrators, and other stakeholders across healthcare organizations to understand their workflows, challenges, and needs
- **Quarterly Surveys:** Established a regular feedback system to gather quantitative data on user satisfaction and feature prioritization
- **User Round Tables:** Facilitated weekly discussions with key users to gather qualitative feedback and validate design directions
- **Workflow Analysis:** Mapped current processes to identify inefficiencies and opportunities for improvement
- **Competitive Analysis:** Evaluated other healthcare workflow solutions to identify best practices and differentiation opportunities

Key Insights:

Our research revealed that users needed a more streamlined enrollment process, better program visibility, automated alerts for funding opportunities, and improved integration with existing healthcare systems.

Design Process

The redesign process focused on creating a user-centered system that would dramatically improve efficiency while ensuring compliance with Web accessibility standards

1. Design Strategy & Planning

- Defined clear project scopes and requirements through collaborative workshops with stakeholders
- Developed a phased approach to implementing new features without disrupting core functionality
- Established design principles focused on simplicity, efficiency, and accessibility

Key Results:

A design process that clarified project scopes and requirements, resulting in a significant reduction in development time and minimizing scope creep

2. Information Architecture & User Flows

- Restructured the platform's navigation to align with user mental models and workflows
- Created logical groupings of related functions to reduce cognitive load
- Designed intuitive user flows that reduced the steps needed to complete common tasks

3. Design System Development

- Developed a comprehensive design system with consistent components, patterns, and styling
- Implemented WCAG AA compliance standards to ensure accessibility for all users
- Created design tokens to maintain visual consistency across the platform and integrate into dev environments

Design System Details:

Software: Figma, Knapsack, Token Studio

Structure: Atomic Design

Team: designers and developers

Link: Figma

4. Wireframing & Prototyping

- Produced low-fidelity wireframes to rapidly test layout and workflow concepts
- Developed interactive prototypes to validate user flows and gather feedback
- Conducted usability testing to identify and address pain points before development

5. Visual Design & UI Refinement

- Applied the design system to create a clean, professional interface that reflected the healthcare context
- Refined visual hierarchy to prioritize the most important information and actions
- Incorporated user feedback to iterate on designs before implementation

Iterative Refinement

The development process employed an iterative approach to continuously improve the platform:

- **In-App Feedback Feature:** Implemented a mechanism for users to provide contextual feedback directly within the application
- **Usability Testing:** Conducted regular testing sessions to evaluate the effectiveness of new features and interfaces
- **A/B Testing:** Used data-driven approaches to compare alternate solutions for key interactions
- **Incremental Releases:** Rolled out improvements gradually to allow for user adaptation and feedback collection

This iterative process enabled us to make evidence-based design decisions and quickly address issues as they arose.

Key Insights:

An overly simplified layout isn't always the best for users. When we took away or hid to much information, users pushed back with requesting more visualization of data to make better informed decisions for patients.

Final Solution

The redesigned AssistPoint platform delivered a comprehensive solution that transformed how healthcare providers manage patient financial assistance:

Key Features

- **Unified Patient Dashboard:** Single interface for managing all aspects of patient financial assistance
- **Automated Tasking:** Real-time task creation when funding becomes available for patients on watchlists with information for users to complete tasks efficiently
- **Event Driven Task Workflows:** Tasking workflows that are assigned after an event is triggered in the patient journey
- **Standardized Digital Enrollment:** Streamlined application process with prepopulated patient information into forms
- **Integration Capabilities:** Improved integrations for more seamless connection with practice management systems, EHRs, and support programs to gather more accurate data
- **Comprehensive Reporting:** Analytics dashboard providing insights into assistance process and outcomes highlighting where the practice needs of improvement and their successes
- **Accessibility Compliance:** Full adherence to WCAG AA standards ensuring usability for all team members

Design System Implementation

- **Consistent component library** ensuring visual and functional coherence across the platform as well as a unified nomenclature between product, design, and engineering
- **Standardized patterns** for common interactions reducing learning curve for users
- **Accessibility-first** approach built into all elements of the interface
- **Unified vocabulary** between users and customer support teams

Transformative New Features:

Tasking: As a direct result from user feedback we created a comprehensive tasking feature within Assitpoint. This feature fundamentally changes how the product works from user flows to information and process architectures. It has been a game changer that has increased user efficiency and usability.

Onboarding Wizard: We discovered that identifying and designating patients for assistance during client onboarding was mostly manual. To streamline this, we created an Onboarding Wizard that analyzes patient data for program eligibility and generates a list of qualifying patients. Users can then mass assign enrollments with a single click. Decreasing onboarding time for new clients by 75%.

Look for case studies on these individual featuers

Results & Impact

The redesigned AssistPoint platform delivered significant measurable improvements:

- **Increased User Engagement:** 38% increase in user engagement within 6 months of implementation
- **Improved Usability:** System Usability Scale (SUS) score increased by 18%
- **Enhanced Accessibility:** Achieved full compliance with WCAG AA standards
- **Reduced Development Time:** New design process significantly reduced time to implement new features

Key Results:

By January 2025, the platform had processed over $6 billion in patient financial assistance awards since its inception, helping thousands of patients access life-saving treatments that would otherwise be unaffordable.

- **Minimized Scope Creep:** Clearer project scopes and requirements reduced feature bloat
- **Streamlined Patient Assistance:** Reduced enrollment time for financial assistance programs from 15 minutes to less than 20 seconds for digitally integrated programs

Lessons Learned

The AssistPoint redesign project yielded valuable insights that have informed my approach to product design:

- **User-Centered Process is Vital:** Placing users at the center of the design process resulted in higher satisfaction and adoption rates
- **Cross-Functional Collaboration:** The success of the project depended on strong partnerships between design, development, product, and business teams
- **Iterative Feedback Loop:** Building in mechanisms for continuous feedback created a virtuous cycle of improvement
- **Accessibility as Foundation:** Designing for accessibility from the start created a better experience for all users
- **Metrics Matter:** Establishing clear success metrics helped guide decision-making and demonstrate value

Next Steps

Following the success of the redesign, several initiatives were planned to further enhance the platform:

- Expansion into additional medical specialties beyond oncology
- Further integration with inventory and pharmacy management systems
- Enhanced analytics with predictive capability and machine learning
- Mobile application development to provide on-the-go access for healthcare providers

Conclusion

The AssistPoint platform redesign demonstrates how thoughtful, user-centered design can transform complex healthcare processes into streamlined workflows that benefit both providers and patients. By reducing administrative burdens, the platform allows healthcare professionals to focus more on patient care while ensuring that financial barriers don't prevent patients from receiving life-saving treatments.

This project exemplifies my approach to product design: understanding user needs, creating intuitive interfaces, building accessible systems, and measuring impact through quantifiable metrics—all while maintaining a focus on the human impact of the technology we create.