

# **Leon Barnard**

Content and Experience Designer

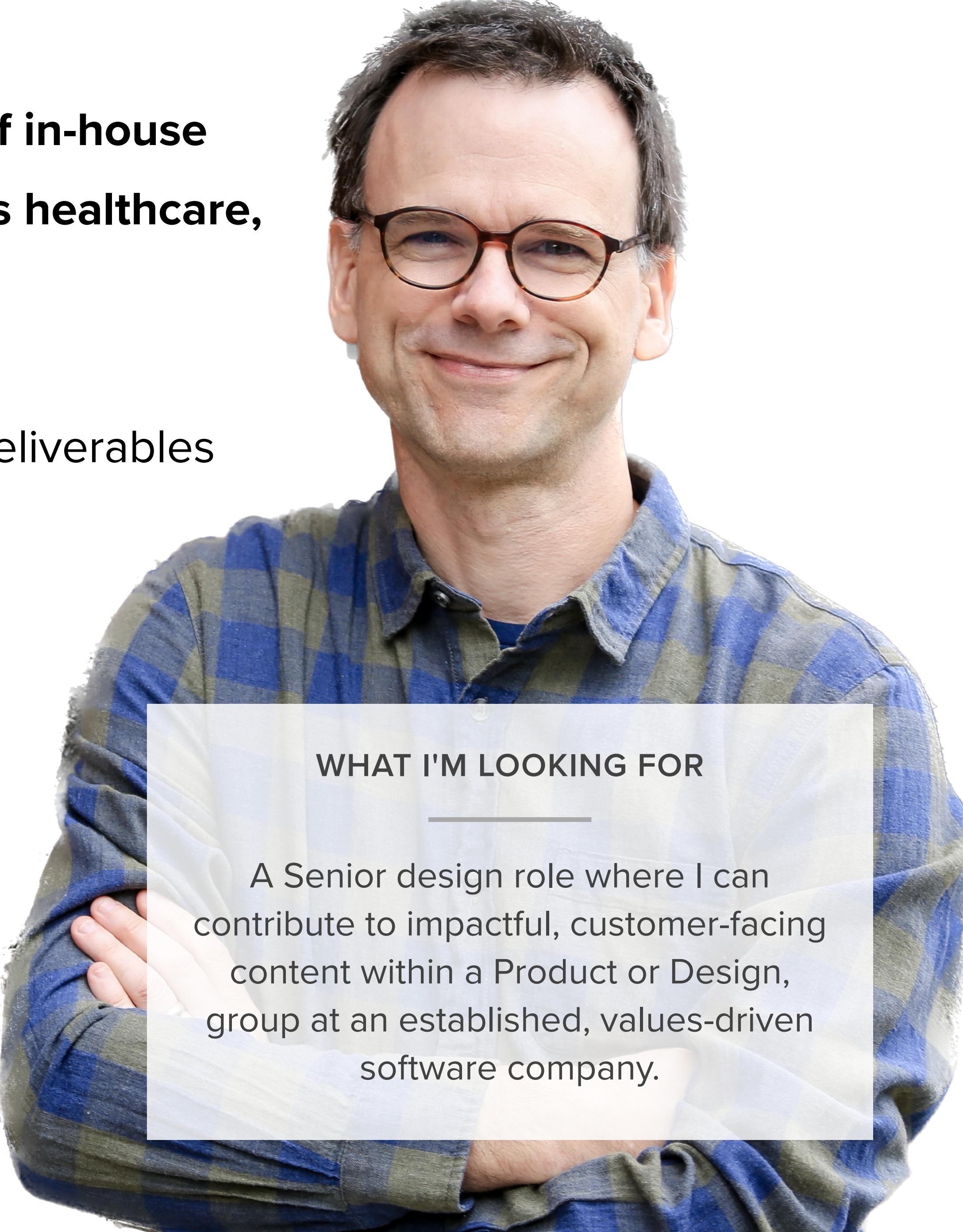
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PREPARED FOR PORTFOLIO PRESENTATION AT PAYPAL • JUNE 5, 2024

**Hi. I'm Leon, a Content and UX Designer with 20 years of in-house experience at large and small software companies across healthcare, developer and design tools, and more.**

I excel at synthesizing complex information into practical deliverables that empower users and elevate brand.

I spent the first half of my career building design skills and improving my design sense and the second half learning and refining the craft of writing.



#### WHAT I'M LOOKING FOR

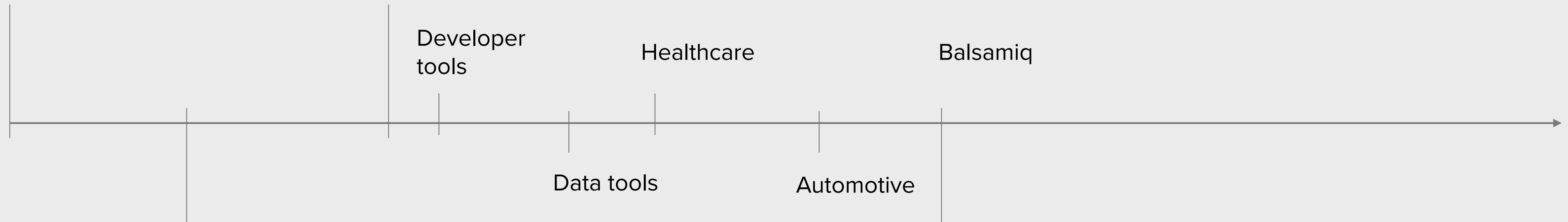
A Senior design role where I can contribute to impactful, customer-facing content within a Product or Design, group at an established, values-driven software company.

# My Skills & Experience

# Career Timeline

**B.S. in Industrial Engineering**

**User Experience and Content Designer**



**M.S. in Industrial Engineering  
(HCI focus)**

**Technical Writer, Content Designer, Content Marketer and Strategist**

# Some of my design work

The screenshot shows the Sentri7 software interface. At the top, there's a navigation bar with links for Dashboard, Documents, Rules, Patients, and Reports. The Reports section is active, showing a sub-menu for 'All Reports > HAIs by Quarter'. Below this, there's a search bar and a date range selector from '1/1/2010' to '12/31/2010' with a 'Run' button. A chart titled 'Line Listing - Q4 2010' shows a peak in activity around October. To the right, there are several filter lists: 'Frequently Used' (SSI by Type, All Device-Associated HAIs, BSI vs. CLABSI, PNEU onset, HAIs by Quarter), 'MDRO/CDI' (MRSA, VRE, C. diff, Klebsiella, Acinetobacter), and 'Device-Associated Infections' (CLABSI, CAUTI, VAP). At the bottom, there's a table for 'Document Summary' and a 'Line Listing - Q4 2010' table.

This screenshot shows a report titled 'NHSN Reportable Procedure Denominators (3)'. It includes a note about filtering for 'Closed' status and 'NHSN Reportable' documents. Below this is a table with columns: Patient, Event ID, NHSN Procedure Code, Date of Procedure, and Export Status. The table lists three procedures: Garfield, James (PROC-21, AMB - Limb Amputation, 09/21/10, Exported, 10/01/10); Hoover, Herbert (PROC-32, CARD - Cardiac Surgery, 09/25/10); and Lincoln, Abraham (PROC-33, AVSD - AV shunt for dialysis, 09/26/10).

The screenshot shows the 'Transaction List' page in the B2B Suite. It displays a table of transactions over the last 4 hours. The columns include Document ID, Protocol, Document Type, Date/Time, Status, Contains Warnings?, Sender, Receiver, Quantity, Amount, and Control Number. Three transactions are listed: A3456-96 (X12, GS Functional Group Header, Pending, ABC Inc, XYZ Inc, N/A, N/A), A3456-97 (X12, 850 Purchase Order, Success, ABC Inc, XYZ Inc, 40, \$235, 056871234), and A3456-98 (X12, 855 Purchase Order Ack, Success, ABC Inc, XYZ Inc, 40, \$235, 056871238).

This screenshot shows a JIRA ticket for issue #864. The title is 'Ingrid would like to filter the CLL by document status'. The narrative describes adding a filter above the CLL table to filter by document status (New, Open, Closed). Below this is a 'Detailed Story Narrative' section. Under 'Images/Mockups', there's a screenshot of a table titled 'View positive cultures resulted from 08/31/2009 to 09/01/2010'. The table has columns: Culture, Patient, Location, Recent Events, Admit Date Spec Taken Resulted, Organism, and Actions. It shows two entries: one for Cameron, David (Radiology, PROC, Closed 8/25/2010, VIRIDANS GROUP STREPTOCOCCUS) and another for Transfuse Platelet (Radiology, PROC, Closed 8/25/2010, VIRIDANS GROUP STREPTOCOCCUS). The 'Acceptance Criteria' section lists requirements for the filter and table layout.

The screenshot shows the 'PHP New Project Wizard UI Spec' page on the NetBeans website. It includes sections for 'Table of contents', 'Use Cases and Scenarios', and 'Specification'. Below this is a 'Specification' section for 'Wizard, Step 2' with a 'New PHP Project' dialog box. The dialog box shows steps for choosing a project, naming it 'PhProject1', and setting up a sources folder. The 'NetBeans.org' sidebar on the right provides links for joining, news, releases, mailing lists, bugzilla, contribute, teams, and guidelines.

Leon Barnard

# Areas of Expertise

- Content Design
- Experience Design
- Cross-functional Collaboration

**“** He is the best UX/UI expert I have ever worked with. **I learned so much from him.**

**“** His design perspective is at once focused and empathetic.

**“** Leon is a strong asset to technical content teams.

**“** Working with him was always easy: he's a **terrific team player**.

# Also: I love to share what I learn

In the last 10 years, I've given talks and written articles (and 1 book) on the topics of user experience, remote work, documentation, marketing, careers, and web technologies. See [leon.land/work](#) for all the links.

## 40+ articles

Publications include Free Code Camp, UX Mastery, CSS Tricks, and Mind The Product.

## 30+ Talks

Events include Convey UX, Coder Foundry, Product Collective, and Write The Docs.

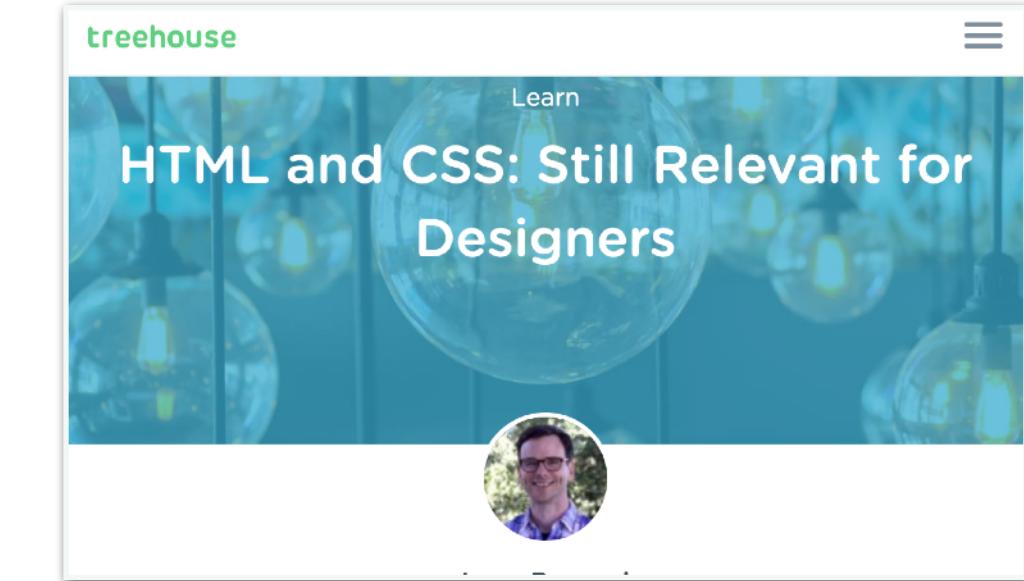
## 20+ Interviews

Podcasts include Nielsen Norman Group, UI Breakfast, Product Thinking with Melissa Perri, and Startups for the Rest of Us with Rob Walling.

# Notable Writing

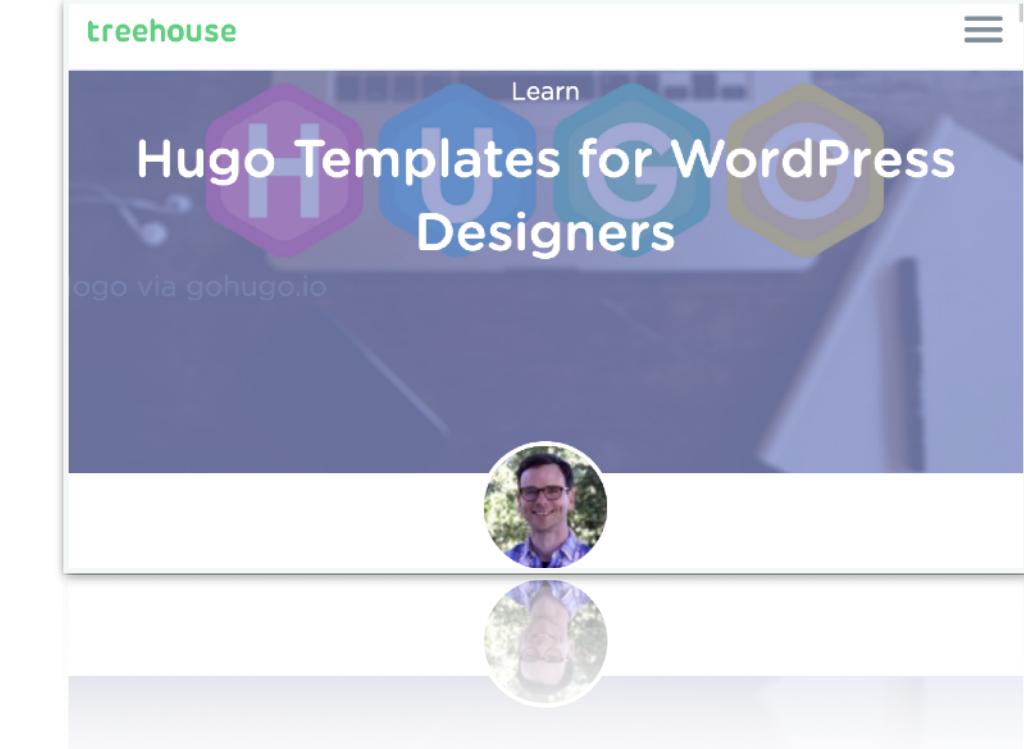
## HTML and CSS: Still Relevant for Designers

A blog post for the Treehouse blog that showcased how designers could use some knowledge of HTML and CSS to communicate better with developers and even participate in the development process.



## Hugo Templates for WordPress Designers

Another blog post for the Treehouse blog that described the differences and similarities and between Hugo and Wordpress templates for people considering moving to a static site.



## Wireframing for Everyone

A book I co-wrote with 2 Balsamiq colleagues. It explains not only how to wireframe, but how to think like a designer and work with other roles to follow your design through to implementation.



Leon Barnard

# Case Study

# Redesigning the Admin Interface for Physical Therapy Software

Company: OptimisCorp

## Project Summary

I led the redesign of the administrator area of a SaaS product as a UX team of one.

## Who I Worked With

- Director of Operations (SME)
- Software Trainer (SME)
- Product Manager
- 3 Developers

## Responsibilities

- Qualitative Research
- UX and UI Design
- Content Design
- Front-end Development
- Project Management

The screenshot displays two main sections of the OptimisPT software interface:

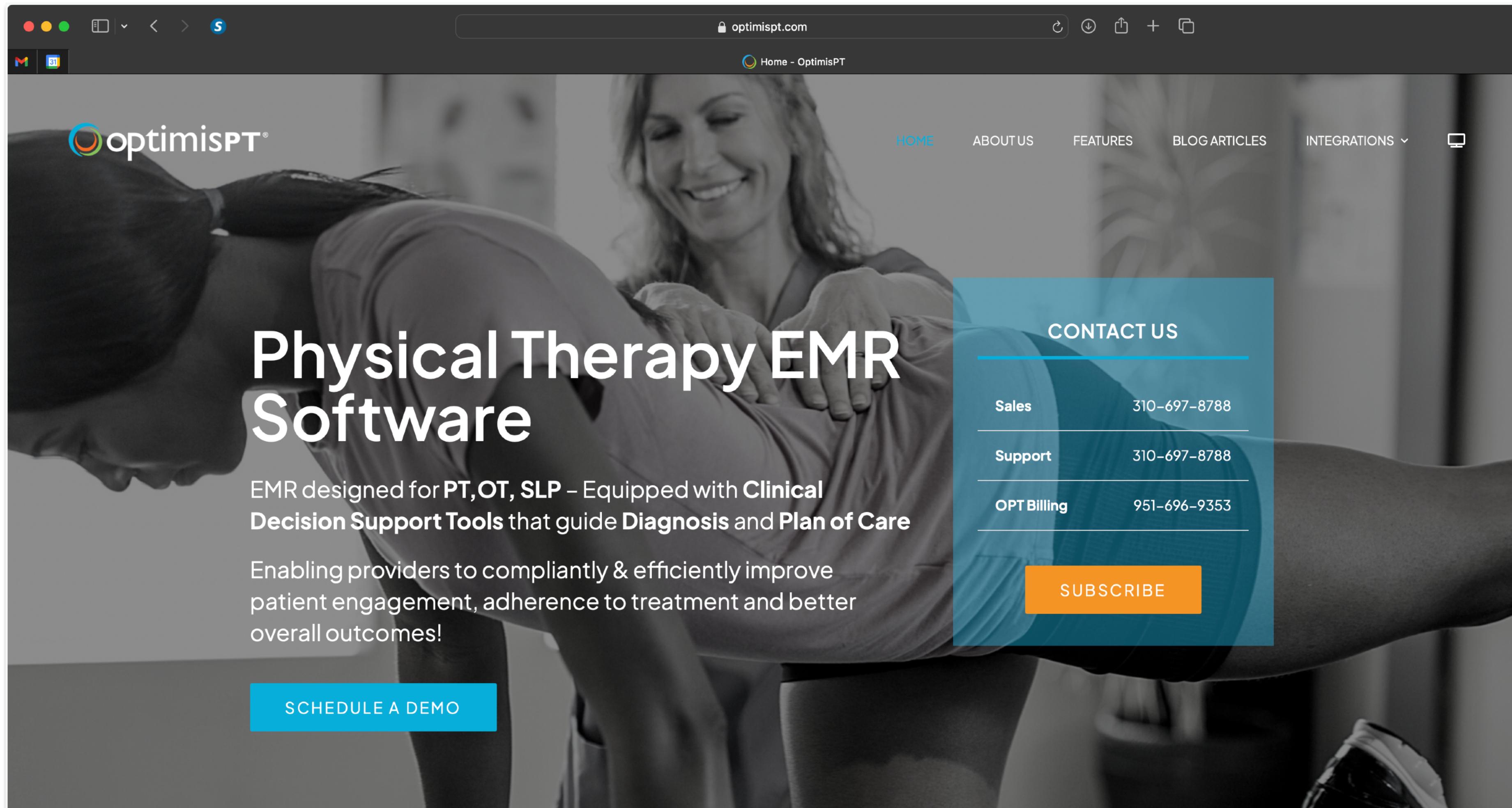
**Therapist Resources:** A table listing physical therapist resources. The columns are Provider Name, Resource Type, and NPI#. The table includes rows for Alma Corona, Chad Nicely, Chae Beloro, Cory Berkeley, Curtis Crook, Darwin Fogt, George Rohlinger, Helene Fearon, Jeanine Gunn, Joe Godges, John Waite, Kim Frost, Linda Gool, Matt Schraeder, Michael Miller, Paul Fiore, Paul Hekimian, Sharon Shafer, Steve Levine, Wes Smith, and Will Horne. Most entries have a green checkmark icon next to them, except for a few which have a red X icon.

Provider Name	Resource Type	NPI#
Alma Corona	Physical Therapist	8888888888
Chad Nicely	Physical Therapist	2222222222
Chae Beloro	Physical Therapist	1113131311
Cory Berkeley	Physical Therapist	5466546789
Curtis Crook	Physical Therapist	7777777777
Darwin Fogt	Physical Therapist	1111111111
George Rohlinger	Physical Therapist	1717171717
Helene Fearon	Physical Therapist	1313131313
Jeanine Gunn	Physical Therapist	1414141414
Joe Godges	Physical Therapist	1515151515
John Waite	Physical Therapist	3333333333
Kim Frost	Physical Therapist	4444444444
Linda Gool	Physical Therapist	9999999999
Matt Schraeder	Physical Therapist Assistant	0987654321
Michael Miller	Physical Therapist	1818181818
Paul Fiore	Physical Therapist	1919191919
Paul Hekimian	Physical Therapist	5555555555
Sharon Shafer	Physical Therapist	1212121212
Steve Levine	Physical Therapist	1588648349
Wes Smith	Physical Therapist	16161616
Will Horne	Physical Therapist	

**Physical Pool:** A section titled "Physical Resources" which states: "Physical resources are non-provider resources in your facility, such as a pool or personal training, that you want to be able to schedule. Physical resources do not have NPI numbers." It lists three items: "TheClinic1 Pool" (Type: Pool, Clinic(s): TheClinic1), "TheClinic1 Pool" (Type: Pool, Clinic(s): TheClinic1), and "TheClinic1 Pool" (Type: Pool, Clinic(s): TheClinic1). A large blue arrow points from the "Physical Pool" section down towards the "Physical Resources" section.

# OptimisCorp owns and operates physical therapy clinics in the U.S.

Their Software Services division creates SaaS-based products for physical therapy practices.



# The Problem

- Optimis wanted to reach customers **outside of the clinics** they owned.
  - Trial users complained about the **setup and configuration process** (the screens within the Admin tab).
  - This area of the product was highlighted as a **key barrier** to new customer sales.



December 28, 2011

Jeanine Gunn, Director of Operations  
OptimisPT  
200 Mantua Road  
Pacific Palisades, California 90272

Dear Jeanine

Dear Jeanine,  
I appreciate the time Tim has taken to call me and the training that was provided to help me in learning Optimis as quickly as possible. I still have much to learn, however, our staff has been a key part of the success in all areas of Optimis.

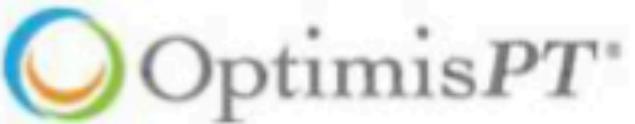
**“ Optimis shows promise, but there are areas of the system with which we are not yet comfortable using.**

1. We learned we should not have an "Open" exception created for each clinician's normal work hours. Since the "Open" exception overrides the "Closed" exception, all of the "Closed" exceptions were ignored. By removing the unnecessary "Open" exceptions, the other exceptions are now working properly.
  2. Since we have so many clinicians, we were not able to view the entire day's schedule on one screen because the columns were too wide. Rachel showed me the column widths could be adjusted under the admin tab. Tech support was asked about this issue and we were not told about the ability to adjust the schedule display.

Below is a list of scheduling issues that have not yet been resolved. If Rachel or Tonya has a solution for any of them, I would appreciate the feedback.

- When we have a patient scheduled half with one person and half with another person, only the 2<sup>nd</sup> time shows on the schedule that we print for the patient (so it tells the patient their appointment is 30 minutes later than it actually is).

# Another problem: The documentation wasn't great...

 OptimisPT®

**ADDING BILLING CASES**

THERE NEEDS TO BE A PAYMENT SOURCE AND BILLING CASE FOR EVERY PATIENT IN ORDER FOR CHARGES TO POPULATE INTO THE BILLING RECORD (THIS IS NEEDED EVEN IF YOU ARE NOT BILLING THROUGH OptimisPT).

**TO DO SO YOU WILL HAVE TO:**

- \*EDIT THE EPISODE OF CARE AFTER IT HAS BEEN CREATED,
- \*SELECT BILLING CASES ON THE LEFT
- \*IF THERE IS ALREADY A BILLING CASE SELECT EDIT , IF NOT ADD BILLING CASE.
- \*SELECT THE PRIMARY INSURANCE (ALSO SELECT THE SECONDARY AND TERTIARY IF THERE IS ONE)
- \*SELECT THE RESPONSIBLE PARTY FROM THE DROP DOWN (THESE NAMES ARE PULLED FROM THE LIST OF CONTACTS). THE PATIENT IS USUALLY THE RESPONSIBLE PARTY UNLESS, THE PATIENT IS UNDER THE AGE OF 18 (THE PARENT GUARDIAN WOULD BE THE RESPONSIBLE PARTY IN THIS CASE) OR IT IS A WORKERS COMPENSATION PATIENT (THE EMPLOYER WOULD NEED TO BE THE RESPONSIBLE PARTY)
- \*BE SURE THAT THE FOLLOWING BOXES ARE SELECTED:
  - Active
  - Therapist signed release form
  - Patient signed release form
  - Signature source - signed for block 12 and 13

THEN UPDATE!

YOU HAVE NOW SUCCESSFULLY CREATED A BILLING CASE 

**New contract**

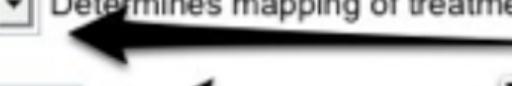
Effective Date Date:  **An Effective Date is necessary!**

Description  **Enter a description, if you like.**

Add Medicare Therapy Modifiers (GP, GO, GN)  **If it is Medicare, click the modifier boxes and enter a percentage.**

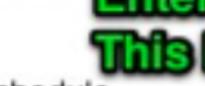
Use Medicare Therapy Caps (KX)

Prompt therapist to approve additional treatment after total annual services reach  % of cap.

Code Set CPT  **Determines mapping of treatments to procedures and list of available procedures.**

Unit Calculation Medicare 8 minute  **The drop down menus are already defaulted to the settings in order for OptimisPT to function correctly.**

Charges Practice/Clinic  Fee Schedule

Expected Reimbursement  % of Practice/Clinic  **Enter a percent of Expected Reimbursement. This is what you actually expect this contract to pay.**

Expected reimbursement/unit is a percentage of the practice or clinic fee schedule.

**Create**  **Click to Create!**

Actual documentation screenshot

## The project went through **4 distinct phases**



**Note:** *The PM left the company shortly after the problem was prioritized, leaving me in the role of product and project manager, in addition to being a UX team of one. Fortunately, I had access to 2 SMEs who knew the problem and product well.*

# Phase 1: Research & Discovery

I spoke to both subject matter experts—the software trainer and the Director of Operations—via **in-person meetings over several days** to understand the users, their needs, and barriers to success.

## 3 categories of problems quickly stood out:

### 1. Poor UX for Frequent Tasks

After initial setup was completed, there were several tasks that users periodically performed in the Admin tab.

These actions were hard to find and confusing for new users.

### 2. Confusing Terminology

While much of the jargon was industry standard, some of the names and terms were specific to OptimisPT and not explained anywhere in the interface.

### 3. Complex Billing Rules and Procedures

Dealing with and understanding insurance as a provider is a pain as it is. The product didn't do anything to make it easier.

# Some of the problem areas

New clinic

Name:

Location code:

NPI:

Letterhead Graphic:  Letterhead Includes Clinic Address and Phone Numbers

Logo Graphic:

Phone:  State License Number  
 Blue Shield Provider Number  
 Medicare Provider Number  
 Medicaid Provider Number  
 Provider UPIN Number  
 CHAMPUS Identification Number  
 Provider Commercial Number  
 Location Number  
 Provider Plan Network Identification Number  
 Federal Taxpayer's Identification Number  
 Clinical Laboratory Improvement Amendment Number  
 State Industrial Accident Provider Number

Address 1:

City:

Time Zone:

Identifier:

CSM:

This form is giving bad UX vibes.

New contract

Effective Date: Date:  An Effective Date is necessary!

Description: Enter a description, if you like.

Add Medicare Therapy Modifiers (GP, GO, GN)  
 Use Medicare Therapy Caps (KX)

Prompt therapist to approve additional treatment after total annual services reach  % of cap.

Code Set: CPT Determines mapping of treatments to procedures and list of available procedures.

Unit Calculation: Medicare 8 minute The drop down menus are already defaulted to the settings in order for OptimisPT to function correctly.

Charges: Practice/Clinic Fee Schedule

Expected Reimbursement:  % of Practice/Clinic Fee Schedule Enter a percent of Expected Reimbursement. This is what you actually expect this contract to pay.

Expected reimbursement/unit is a percentage of the practice or clinic fee schedule.

Click to Create!

So much need-to-know information that's *not* in the UI.

# Some of the problem areas, cont'd

The screenshot shows the OptimisPT software interface. At the top, there's a navigation bar with links for Home, Patients, Scheduling, Billing, Accounting, Reports, and Admin. The Admin menu is open, showing a sidebar with categories like Practice, General, Clinics, Resource Types, and Resources (which is highlighted). A vertical orange bar labeled "Support" is on the right. The main content area has two sections: "Therapist Resources" and "Physical Resources".

**Therapist Resources**

Provider Name	Resource Type	NPI #
+ Alma Corona	Physical Therapist	8888888888
+ Chad Nicely	Physical Therapist	2222222222
+ Chae Beloro	Physical Therapist	1113131311
+ Cory Berkeley	Physical Therapist	5466546789
+ Curtis Crook	Physical Therapist	7777777777
+ Darwin Foot	Physical Therapist	1111111111
+ George Rohlinger	Physical Therapist	1717171717
+ Helene Fearon	Physical Therapist	1313131313
+ Jeanine Gunn	Physical Therapist	1414141414
+ Joe Godges	Physical Therapist	1515151515
+ John Waite	Physical Therapist	3333333333
+ Kim Frost	Physical Therapist	4444444444
+ Linda Gogl	Physical Therapist	9999999999
+ Matt Schraeder	Physical Therapist Assistant	0987654321
+ Michael Miller	Physical Therapist	1818181818
+ Paul Fiore	Physical Therapist	1919191919
+ Paul Hekimian	Physical Therapist	5555555555
+ Sharon Shafer	Physical Therapist	1212121212
+ Steve Levine	Physical Therapist	1588648349
+ Wes Smith	Physical Therapist	1616161616
+ Will Horne	Physical Therapist	

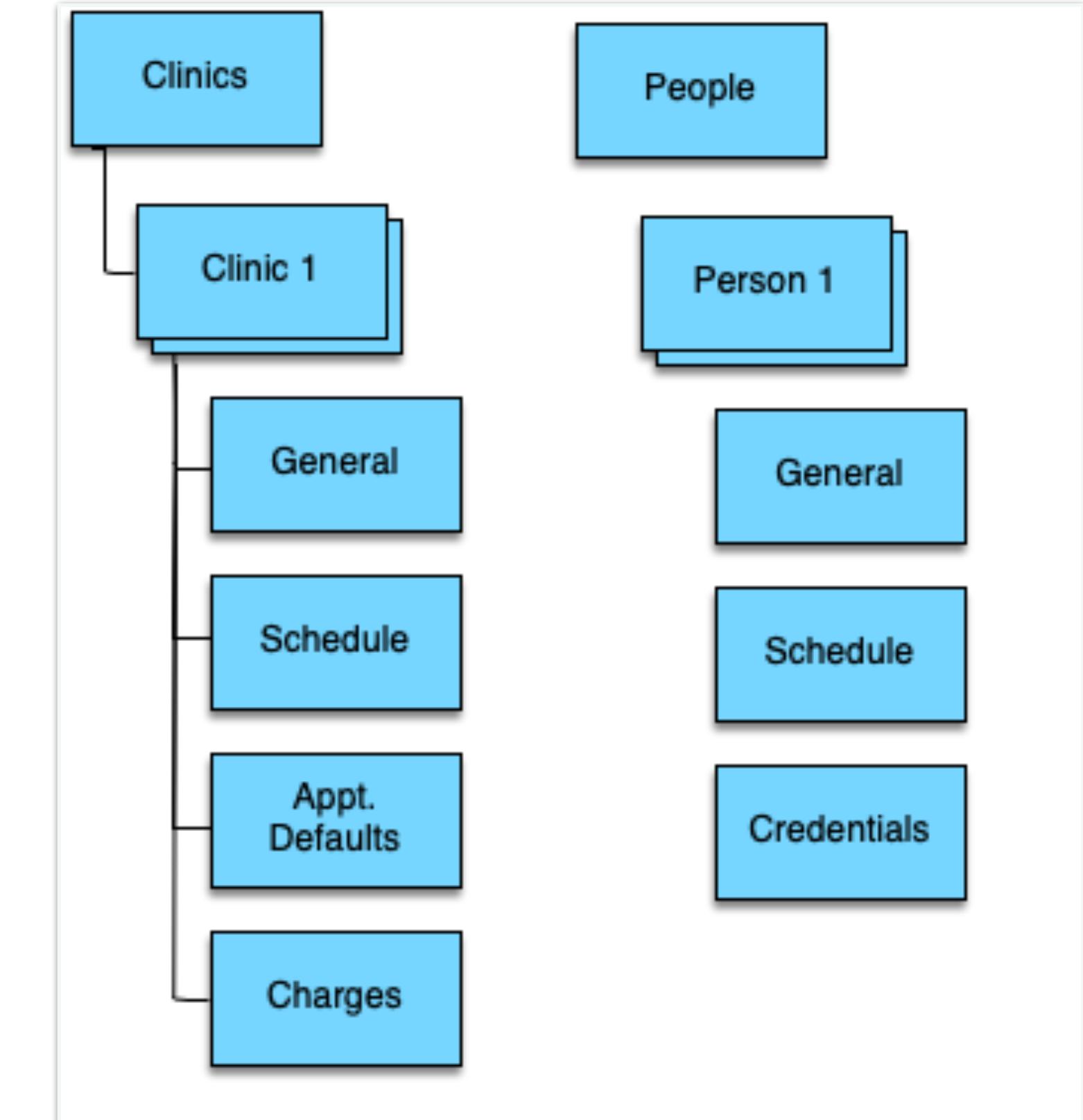
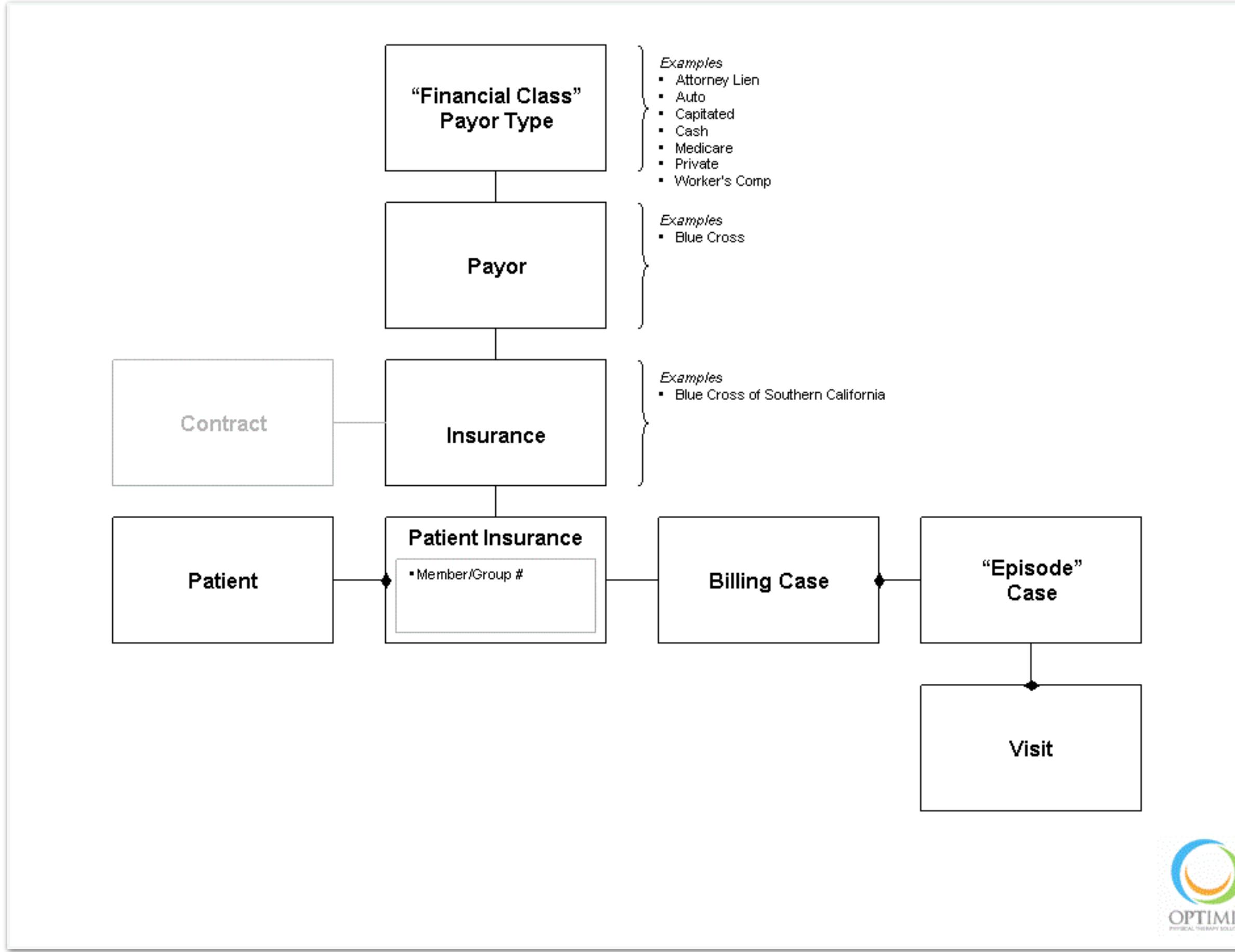
**Physical Resources**

**Pool**

Aquatic Therapy	Edit	Active? <input checked="" type="checkbox"/>		
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So many questions. What does the [+] button do? What's a Physical Resource vs. a Provider Resource? Why are some icons red and others grey?...

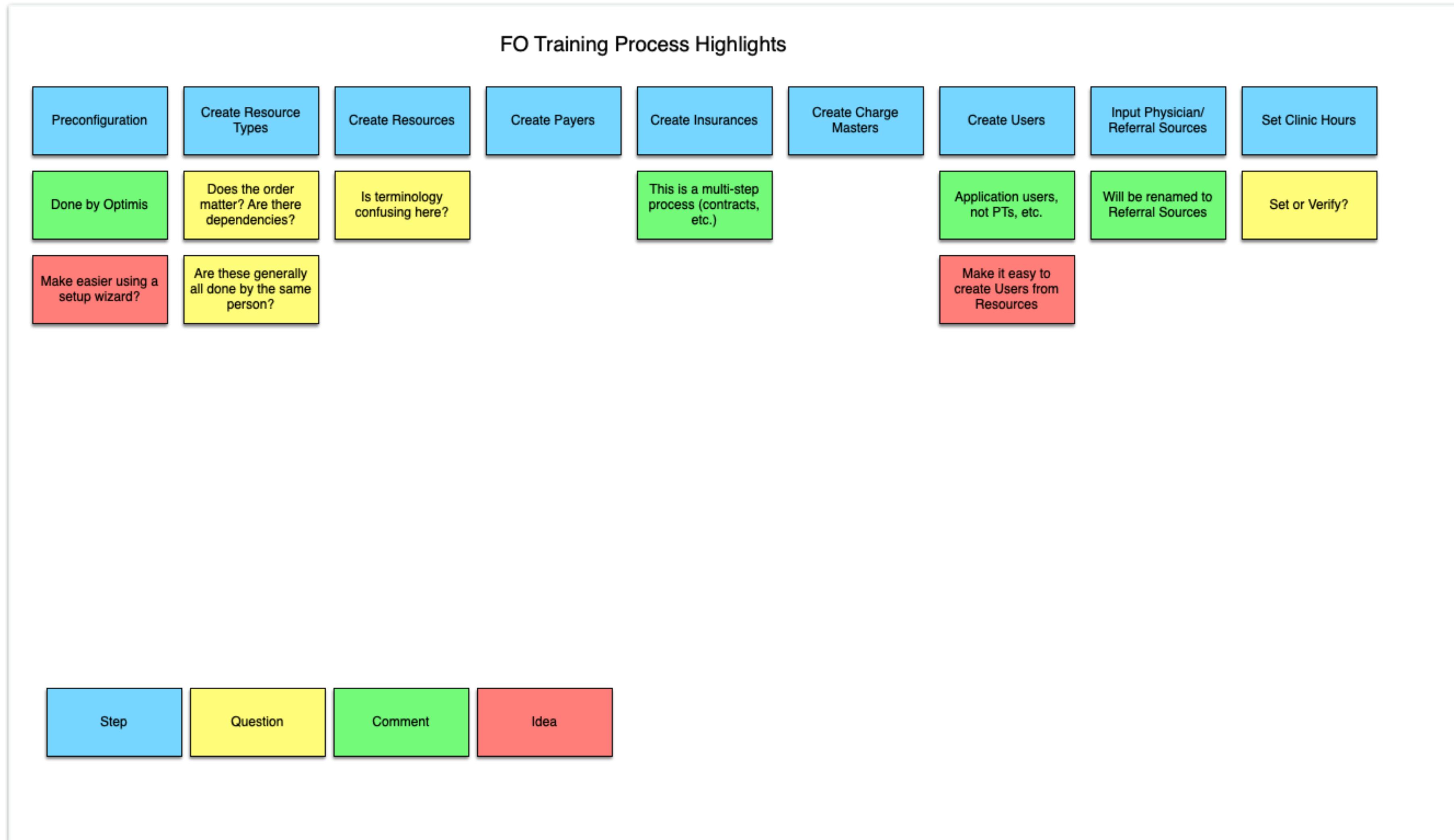
# Research artifacts



Exploring relationships within two main objects - Clinics and People.

Learning a bit about how providers get paid.

# Research artifacts, cont'd

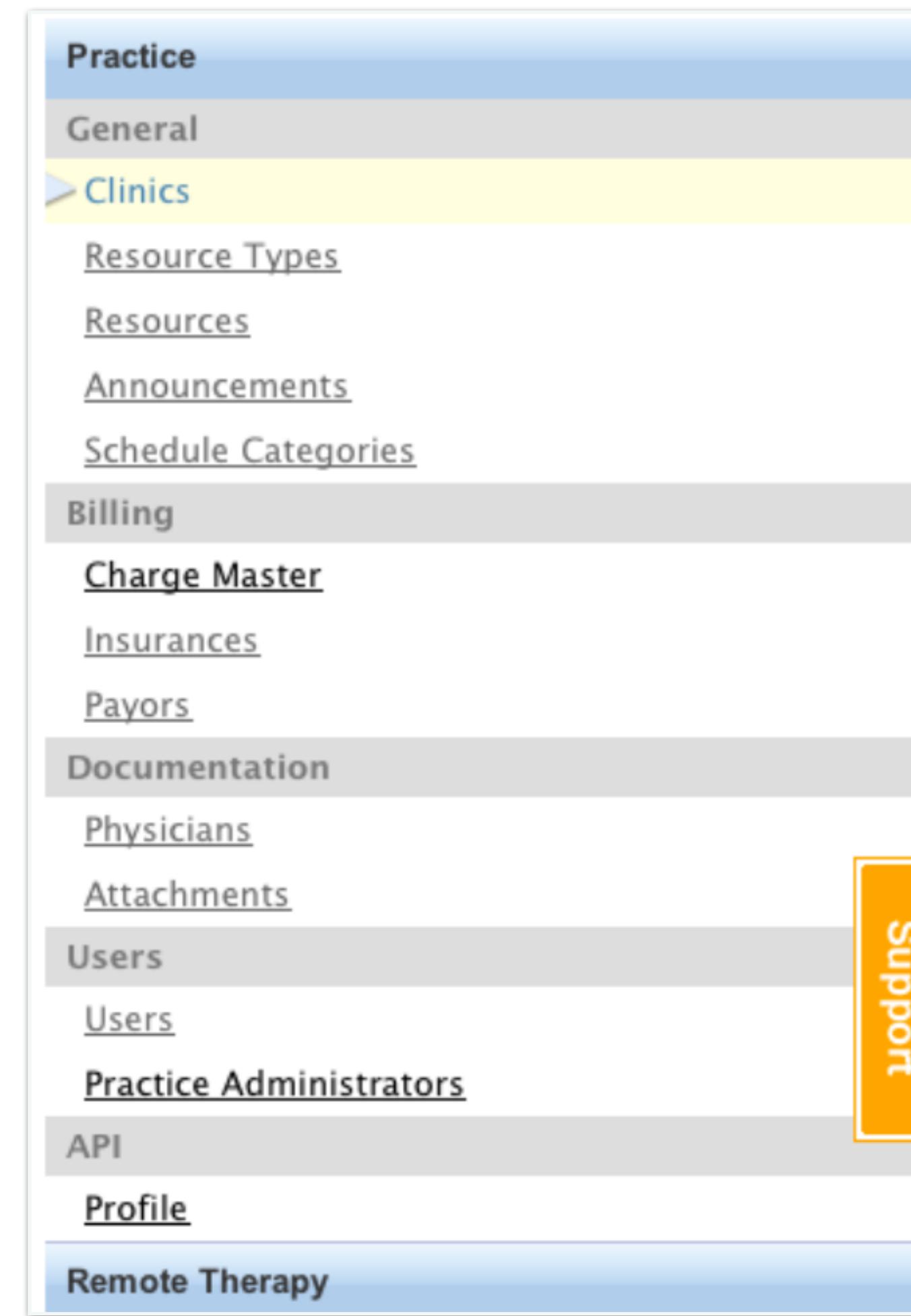


## Early solution hypotheses:

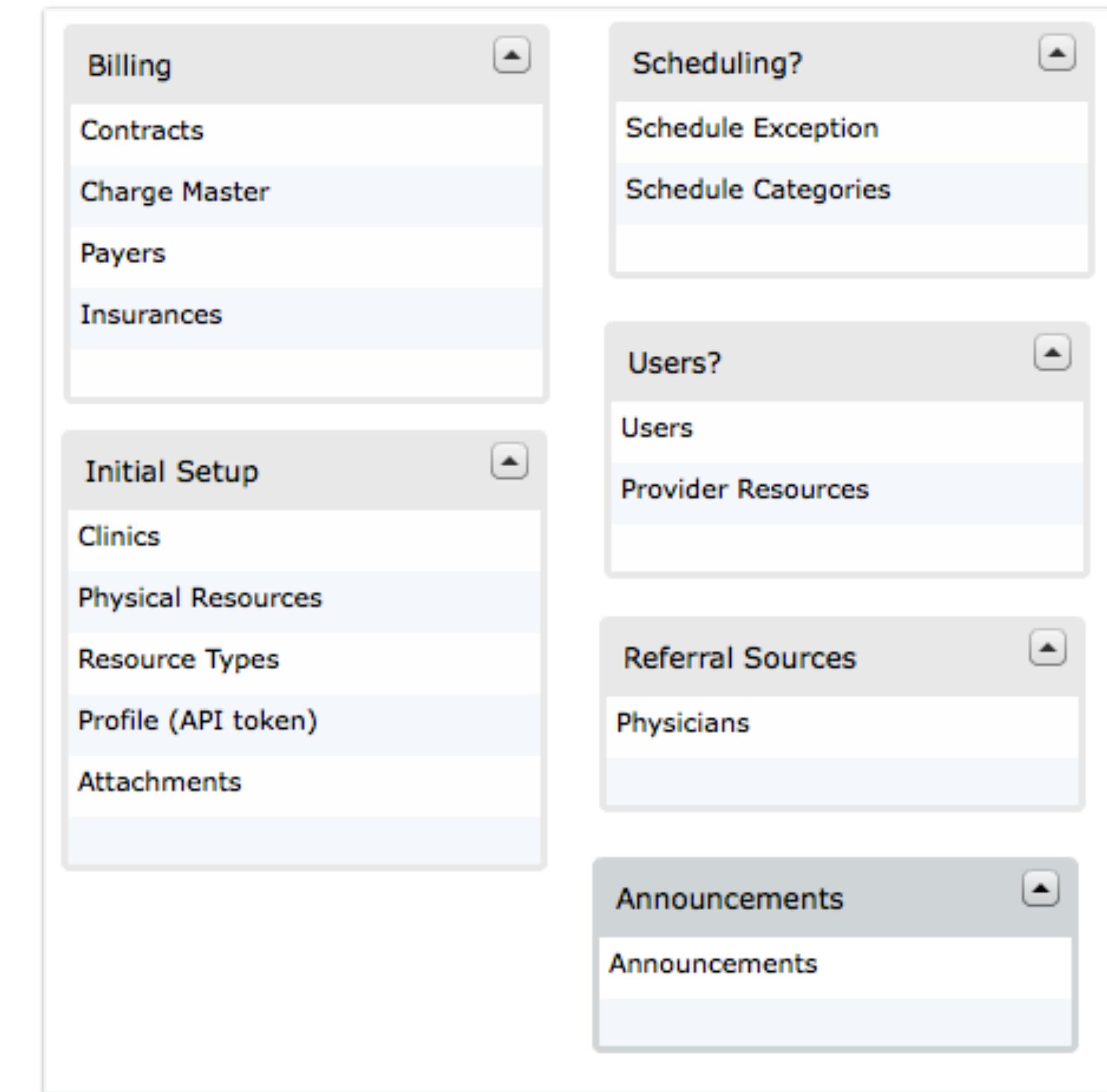
1. Improving the Information Architecture and navigation would improve overall usability and reduce frustration.
2. Applying basic content and UX design principles would improve overall usability and improve satisfaction.
3. Adding inline help and descriptive text would reduce time spent reading documentation and decrease support load.
4. Using a modern front-end web framework would increase consistency and usability of forms, and speed up implementation.

# Phase 2: Low Fidelity Design

**Hypothesis 1:** Improving the Information Architecture and navigation would improve overall usability and reduce frustration.



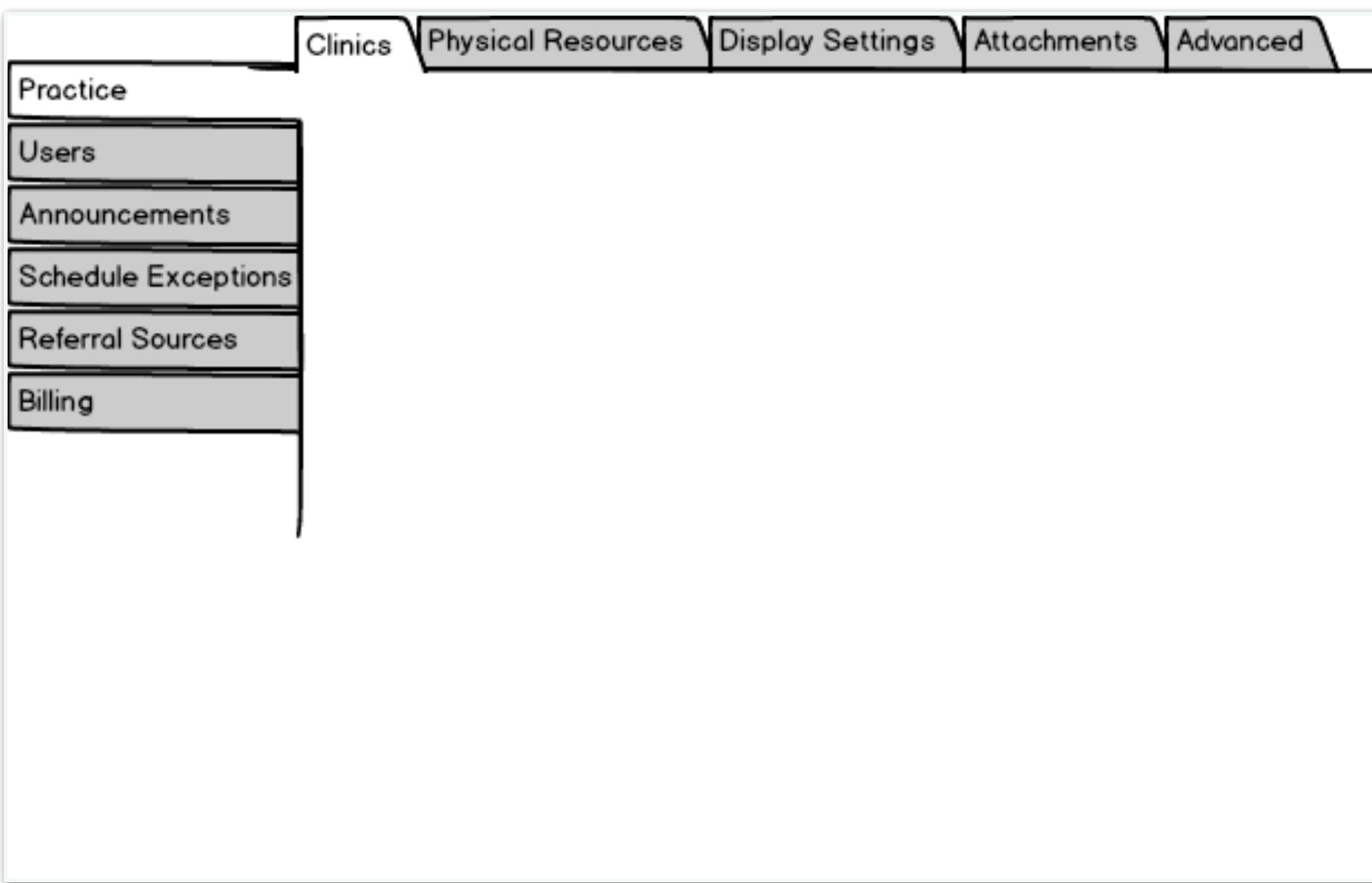
Old navigation and hierarchy.



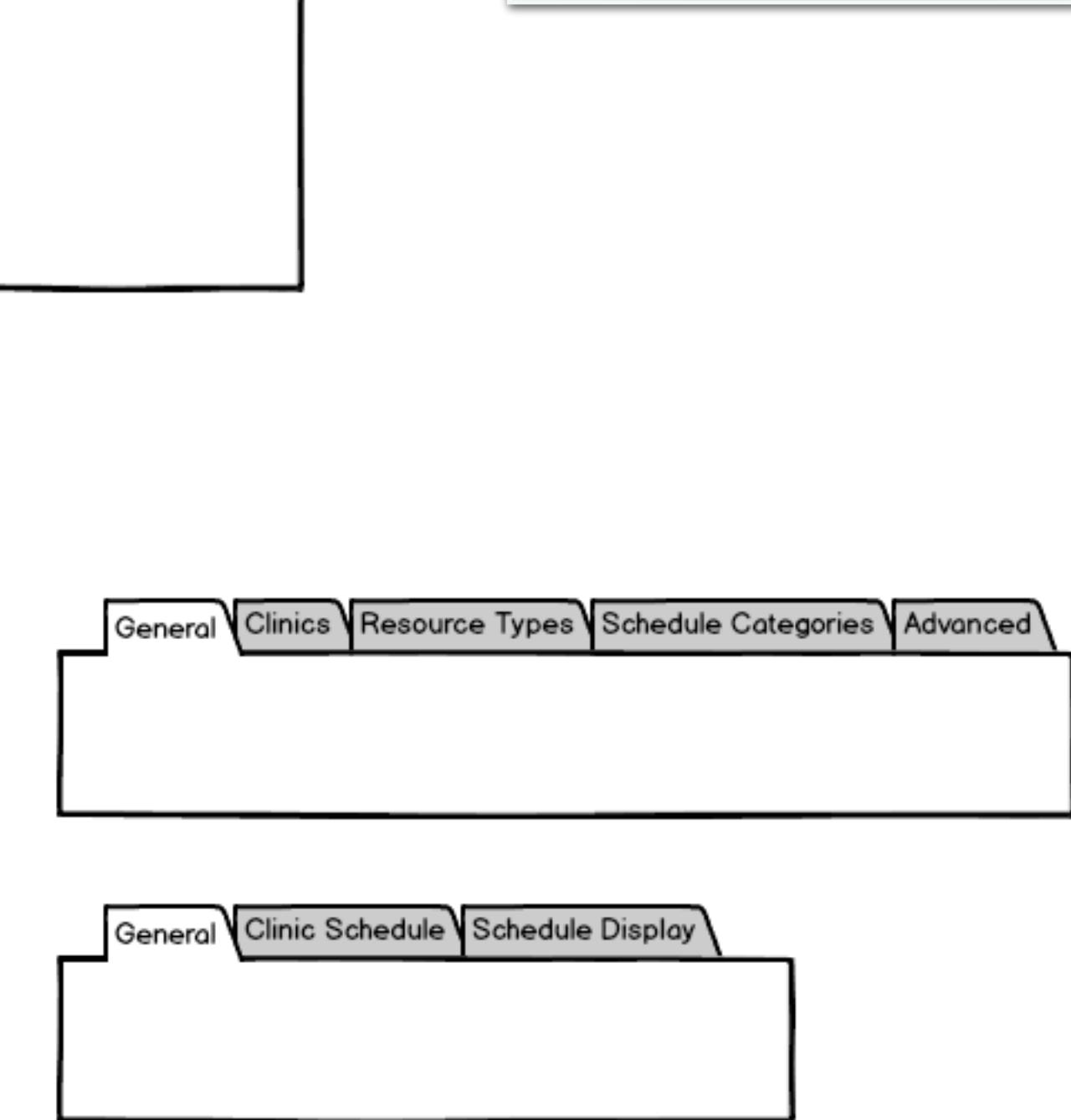
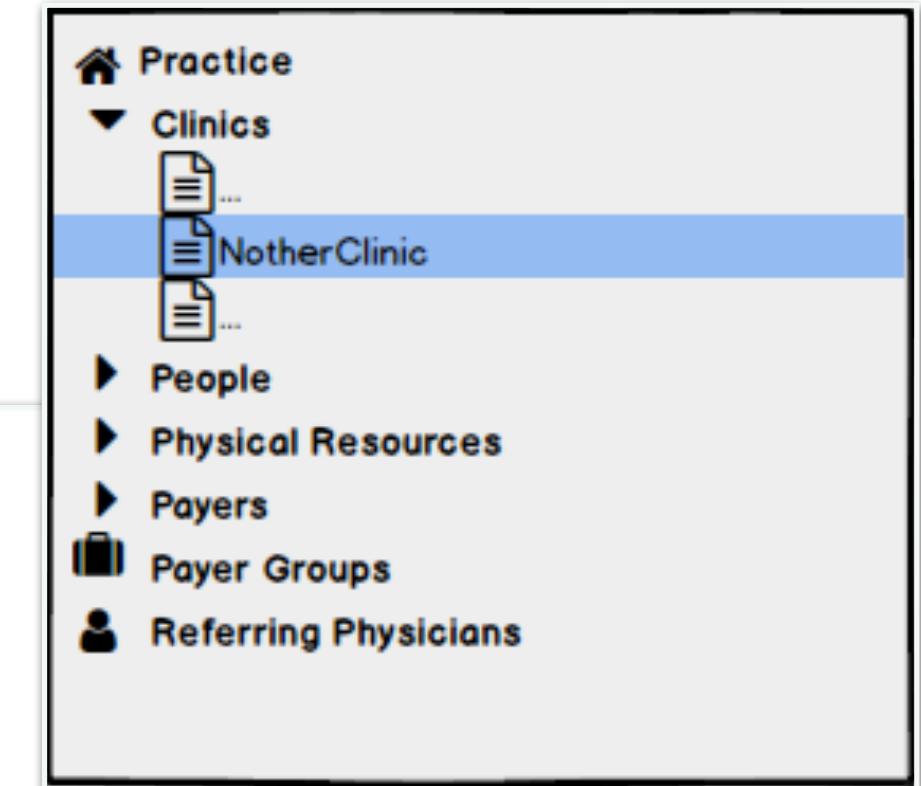
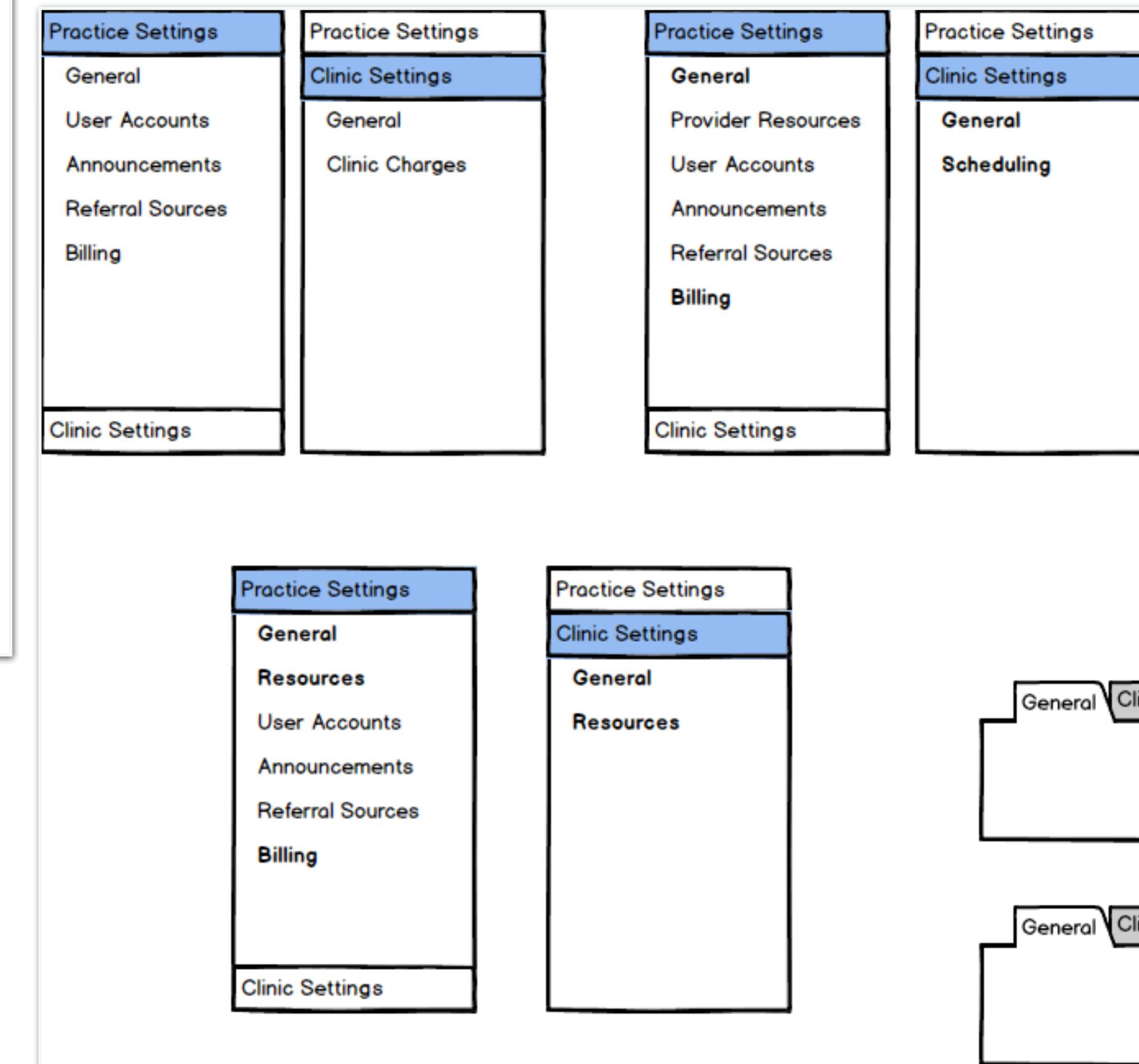
First attempt at a card sort for a new IA.

## LOW FIDELITY DESIGN

**Hypothesis 1, cont'd:** Improving the Information Architecture and navigation would improve overall usability and reduce frustration.



Translating IA ideas into UI navigation concepts.



## LOW FIDELITY DESIGN

**Hypothesis 2:** Applying basic content and UX design principles would improve overall usability and improve satisfaction.

The image shows a low-fidelity wireframe of a software application. On the left, a sidebar contains a navigation menu with items: Practice, Clinics, Clinicians, Resources, Payers (which is highlighted with a blue background), and Referring Physicians. The main content area has a header "Insurances Payer Groups". Below it, a sub-header says "Insurance Plans Accepted By Live-Test" and "Description here and [link to info about payer groups](#)". A search bar "Search Insurance or Payer name" is followed by a table titled "Insurance Plans". The table includes columns for Insurance, Payer Group, Phone, Contract Status, and Actions. The data in the table is as follows:

Insurance	Payer Group	Phone	Contract Status	Actions
<a href="#">A Fortune</a>	Blueshield Umbrella	800-777-3838	Active	<a href="#">Deactivate</a>   <a href="#">Remove</a>
<a href="#">ABC Ins</a>	BlueStar		Active	<a href="#">Deactivate</a>   <a href="#">Remove</a>
<a href="#">Ambulance Chaser Law Firm</a>	Auto Insurance	800-777-0495	Expired	<a href="#">Deactivate</a>   <a href="#">Remove</a>
<a href="#">Anthem Bluecross</a>	Palmetto GBA	8002349870	Active	<a href="#">Deactivate</a>   <a href="#">Remove</a>
<a href="#">blue cross blue shield of texas</a>	Blueshield Umbrella		Missing	<a href="#">Deactivate</a>   <a href="#">Remove</a>
<a href="#">Blue Diamond</a>	BlueStar	888-555-7000	Expired	<a href="#">Reactivate</a>   <a href="#">Remove</a>
<a href="#">Blue Star</a>	BlueStar		Active	<a href="#">Deactivate</a>   <a href="#">Remove</a>

A yellow callout box at the bottom right of the table says "Click to view current contract".

Cleaned up the tables. Moved buttons to a more standard location. Changed icons to text links. Added new columns with important info.

## LOW FIDELITY DESIGN

**Hypothesis 2, cont'd:** Applying basic content and UX design principles would improve overall usability and improve satisfaction.

Anthem Bluecross > 1/1/2011 contract

### 1/1/2011 contract (Active)

**General**

Status:  Active  Inactive

Effective Date\*: 1/1/2011

Description: Current contract

Add Medicare Therapy Modifiers (GP, GO, GN)

Use Medicare Therapy Caps (KX)

Prompt therapist to approve additional treatment after total annual services reach 75 % of cap

**Billing**

Code Set: CPT

Unit Calculation Method: Medicare 8 minute

Charge Schedule: Practice/Clinic fee schedule

Expected Reimbursement: 100 % of Practice/Clinic fee schedule

**Fee Schedule**

Code	Procedure	Charge/Unit (Practice/Clinic)	Expected Reimbursement/Unit (100 % of Practice/Clinic)
1100F	2 or more prev falls	\$20.00	\$20.00
97003	Initial Evaluation OT	\$75.00	\$75.00
97001	Initial Evaluation PT	\$225.00	\$225.00
90901	Biofeedback Training by Any Modality	\$125.00	\$125.00
64550	Initial app and instruction on TENS Unit	\$65.00	\$65.00
97002	Reevaluation PT	\$250.00	\$250.00
29280	Strapping; hand or finger	\$45.00	\$45.00

Save Cancel

Improved alignment. Added clear section breaks and headings.

**Bob Bobson**

**General**

First Name: Bob

Middle Initial:

Last Name: Bobson

Email:

Clinic(s):  TheClinic1  NotherClinic

Remote Therapy

Timezone: GMT-8:00 - Pacific Time

**Permissions**

Clinic: Select Clinic Role: Select Role

**Provider Info**

This user is also a provider

Designator(s): OT (PhD., MD, etc.)

NPI#: 8975897852

Resource Type: Occupational Therapist

Add new... Hidden unless checkbox checked

**Default Schedule**

+ Add Schedule

Clinic	Day(s)	Schedule
TheClinic1	M,W,F	9:00 a.m. - 4:00 p.m.
TheClinic1	T	9:00 a.m. - 12:00 p.m.

Home Tab Settings

Included notes to myself and questions to ask the SMEs.

## LOW FIDELITY DESIGN

**Hypothesis 3:** Adding inline help and descriptive text would reduce time spent reading documentation and decrease support load.

**Resource Types**

Description here

**Provider Types**

Description here... [link to more help if needed](#)

Provider Type	Modifier	Actions
Therapist	GP	<a href="#">Edit</a>   <a href="#">Remove</a>
Student		<a href="#">Edit</a>   <a href="#">Remove</a>
Physical Therapist		<a href="#">Edit</a>   <a href="#">Remove</a>
Occupational Therapist	GX	<a href="#">Edit</a>   <a href="#">Remove</a>
PTA		<a href="#">Edit</a>   <a href="#">Remove</a>

**Physical Types**

Description here

Physical Type	Actions
Pool	<a href="#">Edit</a>   <a href="#">Remove</a>
Massage	<a href="#">Edit</a>   <a href="#">Remove</a>
Pilates	<a href="#">Edit</a>   <a href="#">Remove</a>
Gym	<a href="#">Edit</a>   <a href="#">Remove</a>

Added description placeholder text to every page and optional placeholder text for sections and tables.

**Anthem Bluecross**

**General**

Name: <sup>*</sup>	Anthem Bluecross
Insurance Type (EDI 837): <sup>*</sup>	Medicare Primary

**Billing**

Payer Group: <sup>*</sup>	Palmetto GBA
Claim Indicator: <sup>*</sup>	Medicare Part B

**Office Locations**

Description here

Address	Phone	Description	Actions
3984 Mill Rd., Boston, MA 35443	123-456-7890	Anthem BC Boston	<a href="#">Edit</a>   <a href="#">Deactivate</a>   <a href="#">Remove</a>
4854 Ouch Rd., Riverside, CA 92507		Home Office	<a href="#">Edit</a>   <a href="#">Deactivate</a>   <a href="#">Remove</a>
886 Magnolia Ave, Corona, CA 92879		Blue Cross of Ca	<a href="#">Edit</a>   <a href="#">Reactivate</a>   <a href="#">Remove</a>

**Contracts**

Description here

Effective Date	Description	Charges	Expected Reimbursement	Actions
1/1/2011	Current contract	per Clinic fee schedule	90%	<a href="#">Deactivate</a>   <a href="#">Remove</a>
4/1/2010	Old contract	per Clinic fee schedule	95%	<a href="#">Reactivate</a>   <a href="#">Remove</a>

Added inline text placeholder text for confusing fields and the option to have links to more details.

## LOW FIDELITY DESIGN

**Hypothesis 4:** Using a front-end web framework would increase consistency and usability of forms, and speed up implementation.

The image shows two browser windows side-by-side, illustrating the difference in design and consistency between the current OptimisPT palette and a proposed one using a front-end framework.

**Current OptimisPT Color and Style Palette:**

- Tables:** A table with three columns labeled "Heading 1", "Heading 2", and "Heading 3". The first row has a light gray background. The second row has a blue background. The third row has a white background. The fourth row, which is highlighted, has a yellow background. All cells contain "Cell contents" or "Linked cell contents".
- Panels and Text:** A panel titled "This is a bordered panel title" containing "This is regular text. These are links. [Link hover color](#)". Below it is a button labeled "This is a button".
- Navigation Lists:** A list of navigation links: "Navigation link", "Navigation link", "Selected navigation link" (highlighted in blue), "Navigation link", and "Navigation link".

**Proposed OptimisPT Color and Style Palette:**

- Tables:** A table with three columns labeled "Heading 1", "Heading 2", and "Heading 3". All rows have a white background. All cells contain "Cell contents" or "Linked cell contents". An "Action Button" is added to the header row.
- Panels and Text:** The same panel and button as the current palette.
- Navigation Lists:** The same list of navigation links, with the "Selected navigation link" highlighted in blue.

I mocked up some standard UI components using the old HTML and CSS.

I did the same with the Bootstrap framework and Optimis brand colors.

## LOW FIDELITY DESIGN

**Hypothesis 4, cont'd:** Using a front-end web framework would increase consistency and usability of forms, and speed up implementation.

The screenshot shows a web application interface for managing a 'Pattern'. The title bar indicates the file path: file:///Users/leon/Dropbox (Personal)/Next Career Stuff/Previous work/Optimis/Designs/Admin Tab/v2/patternedit2.html. The main content area is titled 'Leon's Pattern'.

**General**

Pattern Name: Leon's Pattern

Body Region: Head and Neck (dropdown menu) - Here's some help text

**Activities**

+ Add Activities

**Measures**

Measure Name	Measure Type	Actions
Neck Mobility	Activity	<a href="#">Delete</a>
Chewing	Activity	<a href="#">Delete</a>
Pain (with movement)	Impairment	<a href="#">Delete</a>

**Interventions**

Treatment	Strategy	Treatment Actions	Actions
Manual Therapy	strategy text here... <a href="#">(Edit)</a>	Spinal STM, Spinal C/R <a href="#">(Edit)</a>	<a href="#">Delete</a>

Save Cancel

I mocked up a test page based on the wireframes I created.

Leon Barnard

# Design Validation

- I designed and iterated on all of the screens, getting frequent feedback from the SMEs.
- I created a 25 page click-through low-fidelity prototype to show the SMEs and Developers to get a go-ahead for implementation.
- It left out details that could be decided later, such as page descriptions.

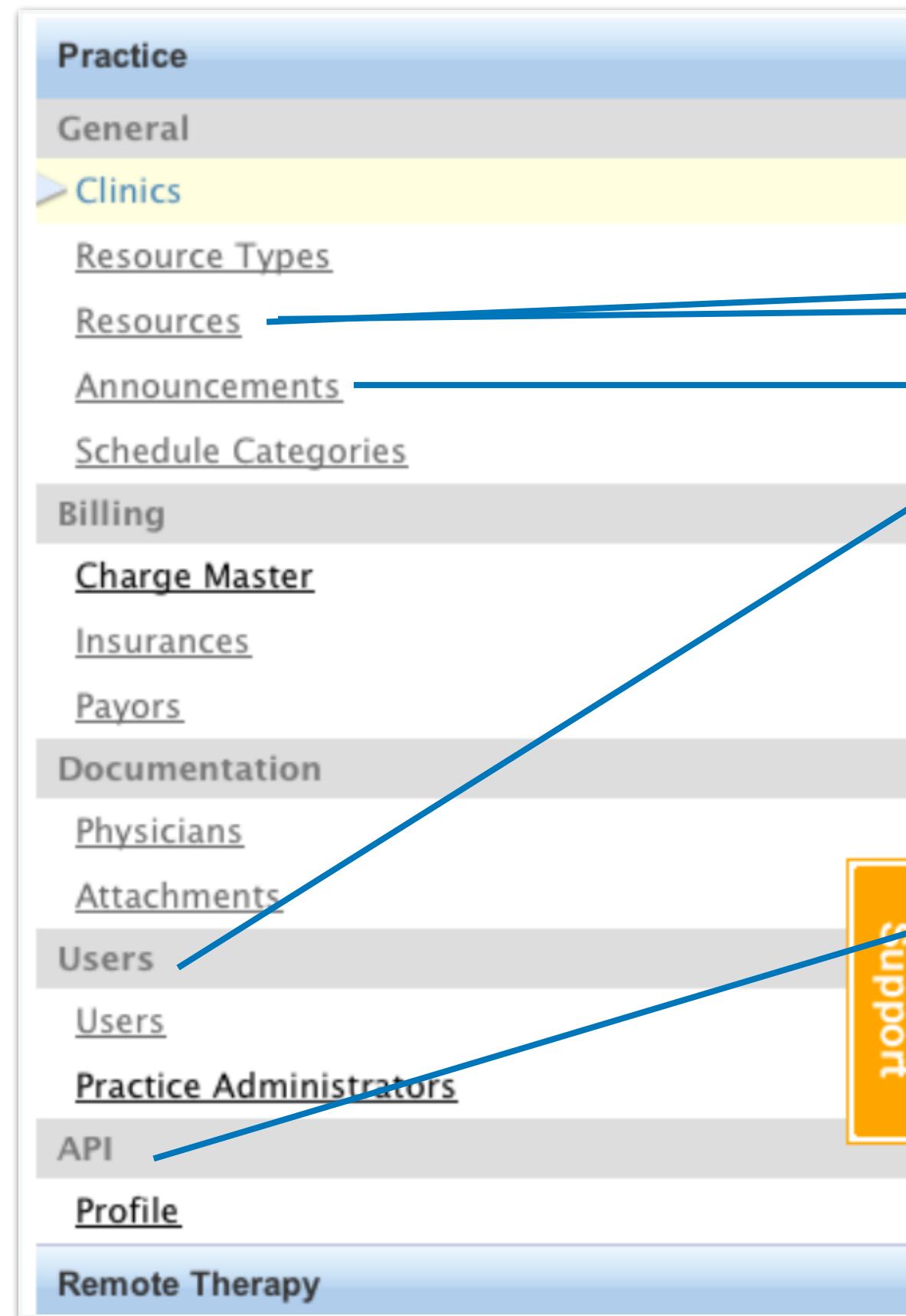
The screenshot shows a software interface titled "AdminTabWalkthrough.pdf" on page 2 of 25. The top navigation bar includes tabs for General, Default Charges, Appointment Categories, Announcements, Attachments, and Advanced. The main content area is titled "Live-Test Default Charges" with a sub-section "Description here". On the left is a sidebar menu with links to Practice, Clinics, People, Physical Resources, Payers, Payer Groups, and Referring Physicians. The right side displays a table titled "Practice Fees" with columns for Code, Procedure, Fee, and Actions (Edit | Delete). The table lists several medical procedures with their corresponding fees:

Code	Procedure	Fee	Actions
1100F	2 or more prev falls	\$20.00	<a href="#">Edit</a>   <a href="#">Delete</a>
97003	Initial Evaluation OT	\$75.00	<a href="#">Edit</a>   <a href="#">Delete</a>
97001	Initial Evaluation PT	\$225.00	<a href="#">Edit</a>   <a href="#">Delete</a>
90901	Biofeedback Training by Any Modality	\$125.00	<a href="#">Edit</a>   <a href="#">Delete</a>
64550	Initial app and instruction on TENS Unit	\$65.00	<a href="#">Edit</a>   <a href="#">Delete</a>
97002	Reevaluation PT	\$250.00	<a href="#">Edit</a>   <a href="#">Delete</a>
29280	Strapping; hand or finger	\$45.00	<a href="#">Edit</a>   <a href="#">Delete</a>

This screenshot shows the same software interface as the previous one, but with a modal window open over the "Practice Fees" table. The modal is titled "Add New Practice Fee" and contains fields for "CPT code or procedure name:" and "Fee for this service:". The "CPT code or procedure name:" field has a dropdown menu with several options, and the option "97001 - Initial Evaluation PT" is highlighted. The "Fee for this service:" field is a text input box with a dollar sign prefix. The background table of fees is partially visible behind the modal.

# Phase 3: Front-end Design & Development

# Improving the IA and navigation



Old navigation and hierarchy.

The diagram shows the new navigation structure on the left and its corresponding URLs on the right. Blue arrows map the menu items to their respective URLs. The 'Clinics' tab is active, showing a list of clinics with a 'Add Clinic' button.

Clinic	Medicare Locality	Location
NotherClinic	DC + MD/VA Suburbs	Elizabethtown, DC
NotherClinic	DC + MD/VA Suburbs	Elizabethtown, DC
NotherClinic	DC + MD/VA Suburbs	Elizabethtown, DC

Switching to a List + Tabs layout made the navigation simpler.

# Improving the IA and navigation

The image displays two screenshots of a web application's front-end design, illustrating improvements in Information Architecture (IA) and navigation.

**Left Screenshot: Users Page**

- Navigation:** A vertical sidebar on the left contains links: Practice, Users (which is highlighted), Announcements, Schedule Exceptions, Referral Sources, and Billing.
- Content:** The main area is titled "Users and Provider Resources" with a sub-section "Users and Provider Resources". It includes a search/filter bar ("Search by first or last name" and "filter by clinic: All Clinics") and a green "+ Add User" button. Below is a table with three rows of user data:

Name	Clinic(s)	Role(s)	Resource Type	NPI#	Account S
Anderson, Bill	TheClinic1	Therapist	Physical Therapist	9999998888	Active
Bobson, Bob	TheClinic1, NotherClinic	Therapist, Clinic Administrator	Occupational Therapist	5454546464	Disabled
Osborne, Joyce	NotherCinc	Scheduler	N/A	N/A	Locked

**Right Screenshot: Announcements Page**

- Navigation:** A vertical sidebar on the left contains links: Practice, Users, Announcements (which is highlighted), Schedule Exceptions, Referral Sources, and Billing.
- Content:** The main area is titled "PracticeName Announcements". It includes a sub-section "Announcements" and a green "+ Add Announcement" button. Below is a table with three rows of announcement data:

Message	Start Date	End Date	Actions
New holiday hours	12/21/11	1/3/12	Edit   Delete
New holiday hours	12/21/11	1/3/12	Edit   Delete
New holiday hours	12/21/11	1/3/12	Edit   Delete

All people were merged together and distinguished by role.  
Previously, some people were only called "Resources."

Announcements got a dedicated nav item because they were used so often.

# Applying basic content and UX design principles

The screenshot shows a web-based administrative interface for managing clinic settings. The page title is "file:///Users/leon/Dropbox (Personal)/Next Career Stuff/Previous work/Optimis/Designs/Admin Tab/v2/clinic.html". The top navigation bar includes back, forward, and search icons, along with a file path and a star icon. Below the navigation is a horizontal menu bar with tabs: "Clinics" (selected), "Physical Resources", "Display Settings", "Attachments", and "Advanced". A breadcrumb trail "Clinics > NotherClinic" is displayed below the menu. The main content area has a header " {Clinic Name} Settings". A vertical sidebar on the left lists categories: "Practice" (selected), "Users", "Announcements", "Schedule Exceptions", "Referral Sources", and "Billing". The main content area is divided into sections by dashed blue lines: "General", "Contact Info", and "Address Info". The "General" section contains fields for "Name" (input field), "NPI" (input field), "Facility Type" (radio buttons for "Outpatient" and "Inpatient" with "Outpatient" selected), and "Legacy Billing System Location Code" (input field with a note: "Leave this blank unless otherwise instructed"). The "Contact Info" section contains fields for "Phone Number" (input field containing "123-456-7890") and "Fax Number" (input field containing "123-456-7890"). The "Address Info" section contains a single input field for "Address Line 1".

Clear which category and tab are selected. Form fields aligned and accessible. Breadcrumbs. Better spacing and section headings.

# Applying basic content and UX design principles

The screenshot shows a web-based application interface for managing clinic settings. At the top, there's a header bar with navigation icons and a URL bar showing the file path: file:///Users/leon/Dropbox (Personal)/Next Career Stuff/Previous work/Optimis/Designs/Admin Tab/v2/clinic.html. Below the header, there's a 'Time Zone:' dropdown set to 'Auto'. The main content area is divided into sections:

- Graphics**: A section for selecting logo and letterhead graphics. It includes a 'Logo Graphic:' field with 'Upload...' and 'Select from existing' buttons, and a placeholder image labeled '150 x 100'. Below it is a 'Letterhead Graphic:' field with similar buttons and a placeholder image.
- Default Schedule**: A table showing daily operating hours. The table has columns for 'Days', 'Hours', and 'Actions'. The data is as follows:

Days	Hours	Actions
M,T,W,Th	9:00 am – 4:00 pm	<a href="#">Edit</a>   <a href="#">Delete</a>
F	9:00 am – 12:00 pm	<a href="#">Edit</a>   <a href="#">Delete</a>

A green button at the top right of the schedule table says '+ Add Schedule Hours'.

Clear actions in Actions column. Selecting a logo moved to the Clinic settings instead of Attachments, and shows a preview.

# Applying basic content and UX design principles

The image shows two versions of a software interface for managing clinic schedule exceptions. The left version is a standard web-based application with a clean, modern design. It features a header 'Remote Therapy Schedule' and a table showing standard operating hours from 7:00 AM to 5:00 PM for each day of the week. Below this is a section titled 'Exceptions' with three tabs: 'Active' (green), 'Pending' (orange), and 'Expired' (grey). The 'Active' tab is selected. Under 'Active', there is a table with columns for Start Date, End Date, Start Time, End Time, Type, Days, and Class. Two rows are shown: one for '02/01/2011' and another for '12/27/2010'. Both rows have 'Edit' links. The right version is a more complex, desktop-style application window titled 'Schedule Exceptions'. It has a dark header bar with a file path 'file:///Users/leon/Dropbox (Personal)/Next Career Stuff/Previous work/Optimis/Designs/Admin'. Below the header are tabs for 'Practice', 'Users', 'Clinics' (which is selected), and 'Physical Resources'. A sidebar on the left lists 'Practice', 'Users', 'Announcements', and 'Schedule Exceptions' (which is highlighted with a blue border). The main content area is titled 'Clinic Schedule Exceptions' and contains a note 'Description here... (View expired clinic schedule exceptions...)'. Below this is a section titled 'Active and Pending Clinic Schedule Exceptions' with a green button '+ Add Schedule Exception'. A table lists three entries for 'TheClinic1' with 'CLOSED' status, spanning the dates '2/13 – 2/14'. Each entry has 'Edit' and 'Delete' links.

Colors, categories, and UX for schedule exceptions was confusing.

Schedule exceptions got their own top-level category and expired exceptions were moved to a lower level.

# Adding inline help and descriptive text

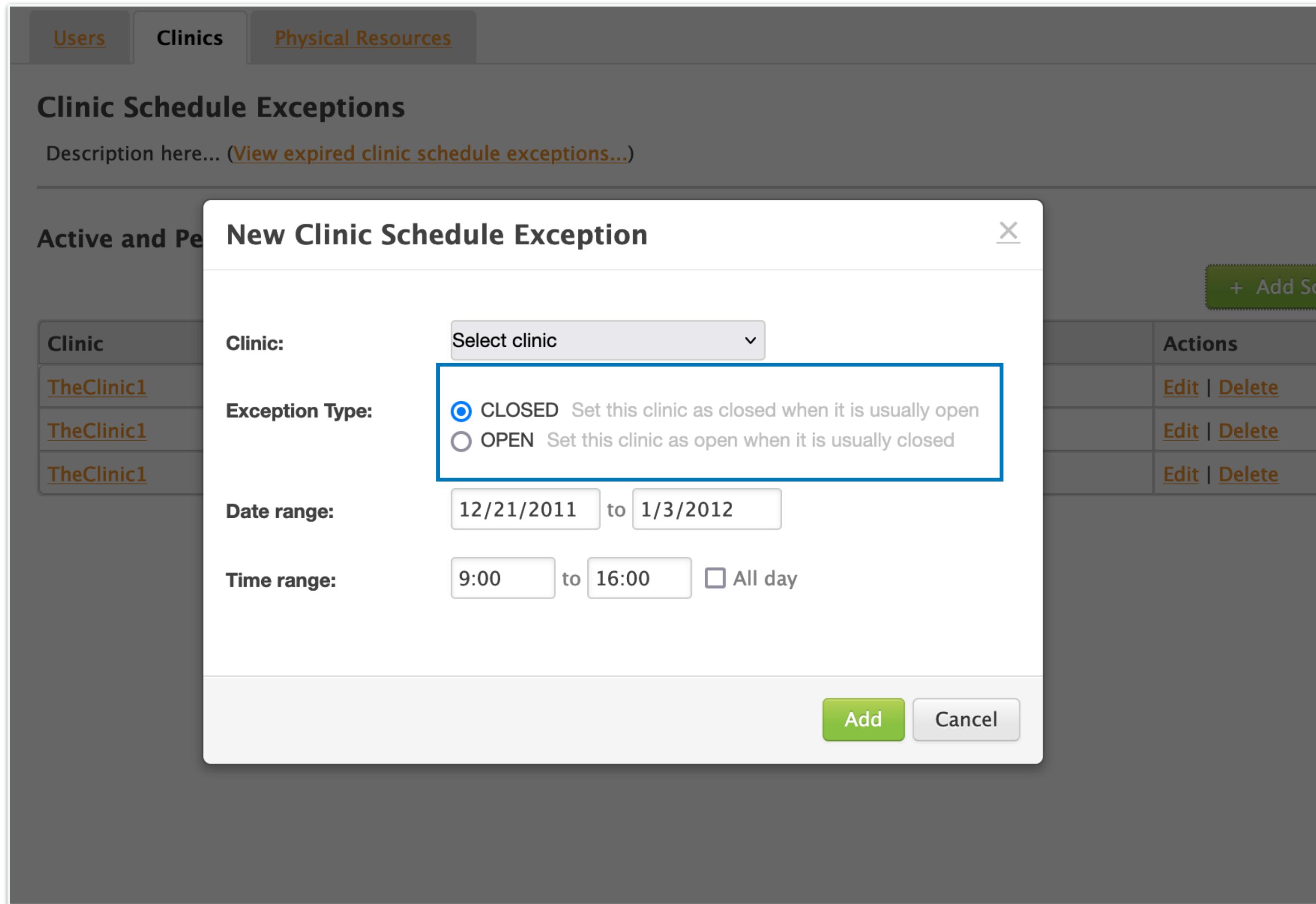
The screenshot shows the OptimisPT software interface. The top navigation bar includes links for Home, Patients, Scheduling, Billing, Reports, and Admin. A secondary navigation bar below it includes General, Clinics, Resource Types (which is selected), Physical Resources, Schedule Categories, and Advanced. On the left, a sidebar lists Practice, Users, Announcements, Schedule Exceptions, Referral Sources, and Billing. The main content area is titled "PracticeName Resource Types". It contains a descriptive text box: "This page allows you to create groups of resources (things that can be scheduled) based on their function or specialty. Create an entry for each resource type within your practice." Below this is a section titled "Provider Types" with a sub-description: "A provider resource type is any licensed therapy provider type, such as an OT, PT or PTA." A green button labeled "+ Add Provider Type" is present. A table lists two provider types: Therapist (GP) and Certified Occupational Therapist Assistant (GP), each with "Edit | Delete" links. Another section titled "Physical Types" has a sub-description: "A physical resource type is any other resource type that can be scheduled, such as a pool or personal training." A green button labeled "+ Add Physical Type" is present. A table lists one physical type: Pool, with an "Edit | Delete" link.

Provider Type	Therapy Modifier	Actions
Therapist	GP	<a href="#">Edit</a>   <a href="#">Delete</a>
Certified Occupational Therapist Assistant	GP	<a href="#">Edit</a>   <a href="#">Delete</a>

Physical Type	Actions
Pool	<a href="#">Edit</a>   <a href="#">Delete</a>

Every page got a page description. Sections had descriptions only when needed.

# Adding inline help and descriptive text



Schedule exception language had been especially confusing for users (e.g., CLOSED vs. OPEN).

# Adding inline help and descriptive text

**1/1/2011 Contract (current)**

## General

**Effective Date:**  This is the date that these contract fees and policies will be applied

**Description:**  Optional

**Medicare Options:**
 Add Medicare Therapy Modifiers (GP, GO, GN)  
 Use Medicare Therapy Caps (KX)  
 Prompt therapist to approve additional treatment after total annual services reach  % of cap

**Code Set:** CPT Determines mapping of treatments to procedures and list of available procedures.

**Unit Calculation:** Medicare 8 minute

## Fee Schedule

This table shows all procedures that have been defined on the [Charge Master](#) page. You can specify whether this contract should charge for these procedures at the defined practice or clinic rate, according to standard Medicare rates, or at custom rates. This can also be done for expected reimbursements.

Code	Procedure	Charges			Expected Reimbursement		
		Base Charge <a href="#">?</a> Practice/Clinic <input type="button" value="▼"/>	Custom Charge <a href="#">?</a> <input type="text"/>	Contract Charge <a href="#">?</a> <input type="text"/>	Base Reimbursement <a href="#">?</a> Medicare <input type="button" value="▼"/>	Custom Reimbursement <a href="#">?</a> <input type="text"/>	Contract Reimbursement <a href="#">?</a> <input type="text"/>
1100F	2 or more previous falls	\$25.00	20.00	\$20.00	\$25.00	<input type="text"/>	\$25.00
97001	Initial Evaluation PT	\$225.00	<input type="text"/>	\$225.00	\$225.00	<input type="text"/>	\$225.00
97002	Reevaluation PT	\$250.00	<input type="text"/>	\$250.00	\$210.00	200.00	\$200.00
97003	Initial Evaluation OT	\$75.00	<input type="text"/>	\$75.00	\$55.00	<input type="text"/>	\$55.00

**Save** **Cancel**

Contracts were the most complicated part of the product and required the most in-app assistance.

Leon Barnard

# Phase4: Handoff & Implementation

# Showing all possible states and including instructions for developers

(Notes for reviewers are labeled in red like this; these are not part of the design)

**Bob Bobson**

(←Ignore navigation on the left for now)

**General**

First Name:

Middle Initial:

Last Name:

Email Address:  This is the email address for logging in to the application

Timezone:

**Account**

(Showing all account statuses for demonstration purposes)

Account Status:	ACTIVE	<a href="#">Disable</a>   <a href="#">Reset</a>
Account Status:	DISABLED	<a href="#">Enable</a>   <a href="#">Resend activation email</a>
Account Status:	LOCKED	<a href="#">Reset</a>

New Password:  If you wish to change your password, enter a new one here (←Will only show for users viewing their own profile)

Confirm New Password:

**Permissions**

To add this person as a user of the application, select a clinic from the list below and assign a role for each clinic you want them to have access to [Explanation of roles...](#) (←Hover to see permissions info)

**Primary Office Address** (←Show this section for new insurances only)

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

**Office Locations** (←Show this section for existing insurances only)

[+ Add Office Location](#)

Address	Description	Phone	Actions
3984 Mill Rd., Boston, MA 35443	Primary Office	123-456-7890	<a href="#">Edit</a>   <a href="#">Deactivate</a>   <a href="#">Delete</a>
886 Magnolia Ave, Corona, CA 92879	Blue Cross of CA	123-456-7890	<a href="#">Edit</a>   <a href="#">Deactivate</a>   <a href="#">Delete</a>

**Contracts** (←Show this section for existing insurances only)

At least one contract is required for billing purposes.

[+ Add Contract](#)

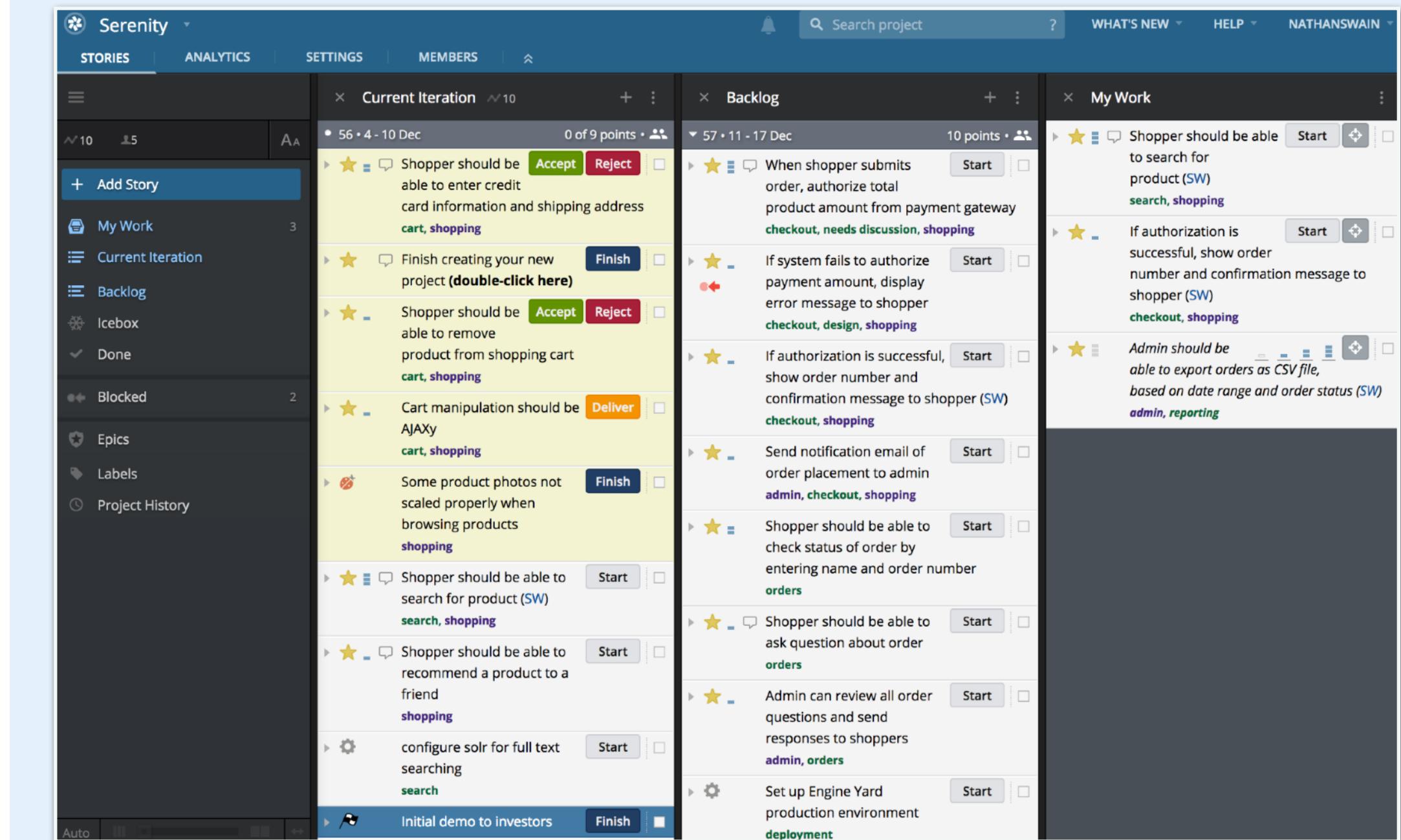
Effective Date	Description	Code Set	Charges	Expected Reimbursement	Actions
1/1/2010	Current contract	CPT	per clinic fee schedule	90%	<a href="#">Deactivate</a>   <a href="#">Delete</a>

Visually labeling UI conditions.

# Writing Pivotal Stories for the developers

## Example story titles

- “*Patricia would like to see terminology that is clear to her so that she doesn't get intimidated by the setup process*”
- “*Patricia would like to see tooltips for each link that tell her what will happen when she clicks on the link so that she doesn't get confused*”
- “*Bill would like to see the insurance office locations and contracts on the same page as the other insurance info so that he doesn't have to click on too many pages*”
- “*Bill would like to see the contract status on the list of insurances page so that he can see at a glance which contracts need to be updated*”



# Results & Takeaways

OptimisPT®

Home Patients Scheduling Billing Accounting Reports Admin

New Physical Resource New Provider Resource

**Therapist Resources**

Provider Name	Resource Type
Alma Corona	Physical Therapist
Chad Nicely	Physical Therapist
Chae Beloro	Physical Therapist
Cory Berkeley	Physical Therapist
Curtis Crook	Physical Therapist
Darwin Fogt	Physical Therapist
George Rohlinger	Physical Therapist
Helene Fearon	Physical Therapist
Jeanine Gunn	Physical Therapist
Joe Godges	Physical Therapist
John Waite	Physical Therapist
Kim Frost	Physical Therapist
Linda Gogl	Physical Therapist
Matt Schraeder	Physical Therapist Assistant
Michael Miller	Physical Therapist
Paul Fiore	Physical Therapist
Paul Hekimian	Physical Therapist
Sharon Shafer	Physical Therapist
Steve Levine	Physical Therapist
Wes Smith	Physical Therapist
Will Horne	Physical Therapist

**Physical Resources**

**Pool**

Aquatic Therapy	Edit	Active? <input checked="" type="checkbox"/>	
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CSM Kim Frost Logout

Practice General Clinics Resource Types Resources Announcements Schedule Categories Billing

Home Patients Scheduling Billing Reports Admin

General Clinics Resource Types Physical Resources Schedule Categories Advanced

**Physical Resources**

Physical resources are non-provider resources in your facility, such as a pool or personal training, that you want to be able to schedule. Physical resources do not have NPI numbers.

**Physical Resources**

+ Add Physical Resource

Name	Type	Clinic(s)	Actions
TheClinic1 Pool	Pool	TheClinic1	<a href="#">Deactivate</a>   <a href="#">Delete</a>
TheClinic1 Pool	Pool	TheClinic1	<a href="#">Deactivate</a>   <a href="#">Delete</a>
TheClinic1 Pool	Pool	TheClinic1	<a href="#">Deactivate</a>   <a href="#">Delete</a>

Leon Barnard

## Results and Reflections:

- The Director of Operations was very pleased with it. I know that they applied this framework and design to the rest of the app after I left.
- Once the research and wireframes were done, implementation was **FAST**. Designing in real code and working side-by-side made it easy for Developers to deliver.
- It was scrappy. Too scrappy? We didn't do user testing or validation with real customers. I filled in for jobs that should have been done by specialists.
- Access to SMEs was crucial. Without the deep knowledge they shared, I only would have been able to polish the old design.

**“ This workflow worked so well that we completed tons of tasks this way, and the period we were working with him was the most productive of my career.**

One of the Developers I worked with on the project

# Generalizable Takeaways

## Content and UX Design:

- The **right guidance at the right time** reduces frustration and increases success rates.
- Make **commonly-performed tasks** easy to find and do.
- A few **basic usability principles** go a long way.

## Process and People:

- Designing with **implementation in mind** can improve consistency and speed.
- It has to **start with users** and their goals.
- Don't be afraid to **try new things** or do old things differently.

# Conclusion

## Back to now...

- I am a versatile designer, yet I've seen the greatest ROI by **focusing on the things that Content Designers care about most.**
- I'm not a web developer, but I **know enough to bridge the gap.**
- Communicating **outside of silos** is my jam. The key to great handoffs is to **know what information the other roles need to know.**
- I believe in doing **what's best for the user**, which requires good research and having an open mind.

**TL;DR:**

*I think I'd be a great fit for this role :)*

# Thank you for your time!

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