CASE STUDY

THERABILL APP DESIGN

RAYA SHOILEKOVA

SEPTEMBER 2022

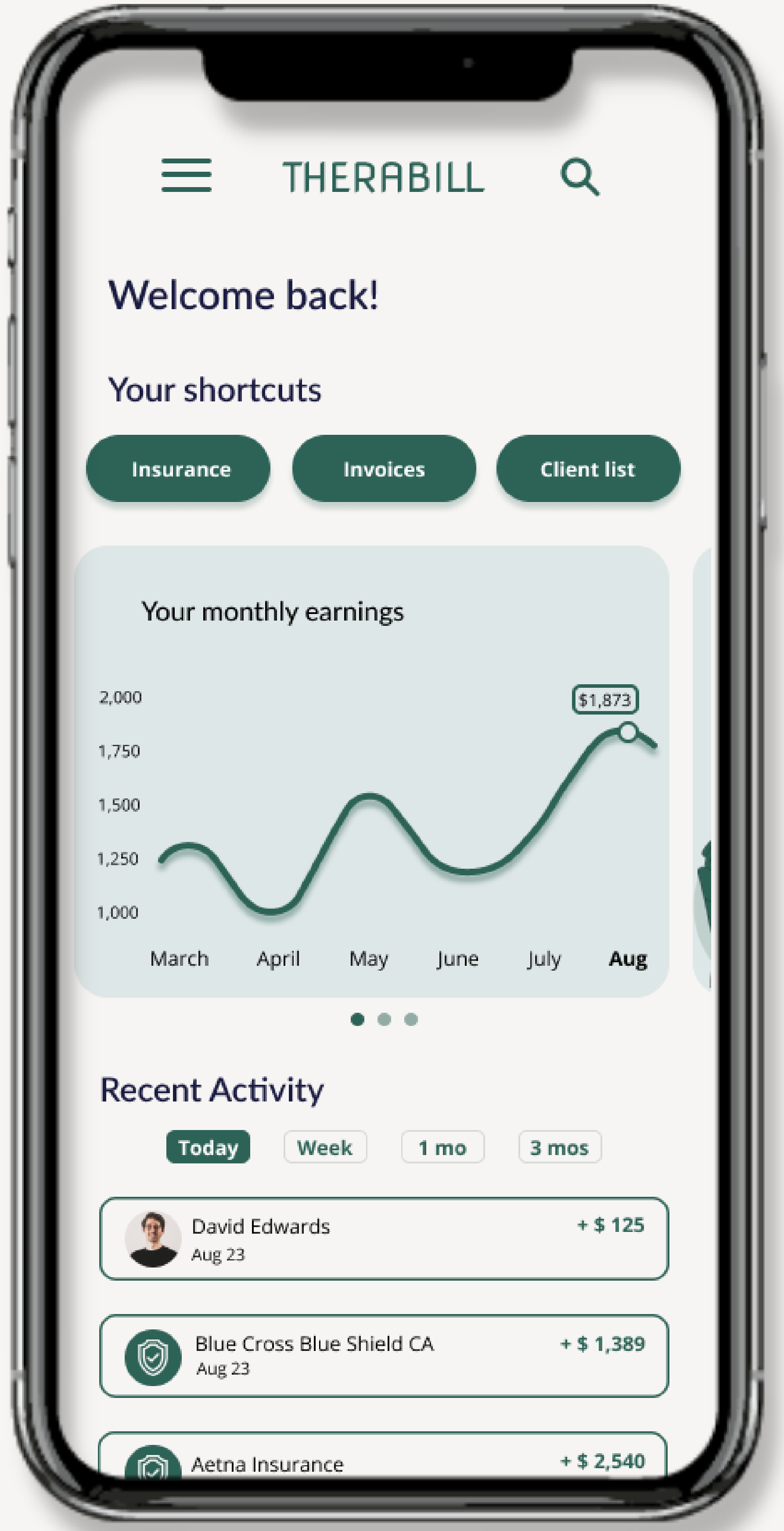
PROJECT OVERVIEW

THE PRODUCT

Therabill is an app designed for mental health professionals to manage their private practice. The app will allow therapists to collect client payments, securely store client information, and submit insurance claims.

PROJECT DURATION

Aug - Sept 2022



PROJECT OVERVIEW

THE PROBLEM

Administrative tasks can be time-consuming for therapists in private practice and take away from time spent with clients.

THE GOAL

Create an app to automate and simplify administrative tasks so more therapists can accept insurance and have more time for sessions.

PROJECT OVERVIEW

MY ROLE

UX designer designing Therabill app from conception to delivery.

RESPONSIBILITIES

Conducting interviews, paper and digital wireframing, low and high-fidelity prototyping, conducting usability studies, accounting for accessibility, and iterating on designs.

UNDERSTANDING THE USER

- USER RESEARCH
- PERSONAS
- PROBLEM STATEMENTS
- USER JOURNEY MAPS

USER RESEARCH: SUMMARY

I gained insight into therapists’ billing needs by conducting interviews and creating empathy maps. Through research, I concluded that a leading user group is therapists new to private practice who want to accept insurance but do not have the time to spend on submitting claims.

My research also indicated common pain points within the user group: claims often get rejected over minor issues and take a long time to get paid. For a new therapist without an established caseload, billing and payment time is detrimental to their choice of working with insurance companies.

USER RESEARCH: PAIN POINTS

1

TIME

Extensive billing time takes away from the time new therapists spend establishing their clientele

2

FINANCE

The long process of submitting claims leaves therapists with unreliable pay schedules

3

PROCESS

The insurance claim process rejects any submission with minor typos and errors

4

SUPPORT

Many therapists feel they miss out on helping a diverse range of clients by not accepting insurance

PERSONA: CHRIS

Chris

Age: 27
Education: MA in Social Work
Hometown: Los Angeles, CA
Family: Lives with partner
Occupation: Therapist

"I want to diversify my clientele."

Goals

- Simplify submitting insurance claims
- Validate claims before submission
- Provide clients with online payment options

Frustrations

- Billing takes too long
- Claims get denied over small errors
- “I miss a large demographic since I cannot accept insurance.”

Chris is a 27-year-old therapist living in LA with his boyfriend. He recently started working for himself and wants to accept insurance to help a broader range of clients. However, submitting claims is time-consuming and confusing. Chris has dyslexia, and when he submitted claims in the past, they would get denied over minor typos. He needs a system that can validate and simplify insurance claims. He only accepts cash and checks but wants to give his clients more options.

PROBLEM STATEMENT:

Chris is a therapist new to private practice who needs an easier way to submit insurance claims because his dyslexia makes them difficult to complete, and they are often rejected over minor typos.

USER JOURNEY MAP: CHRIS

Chris' user journey reveals his need for a way to accept online payments from clients and autofill and validate claims to expedite his payment so he can spend more time with his clients.

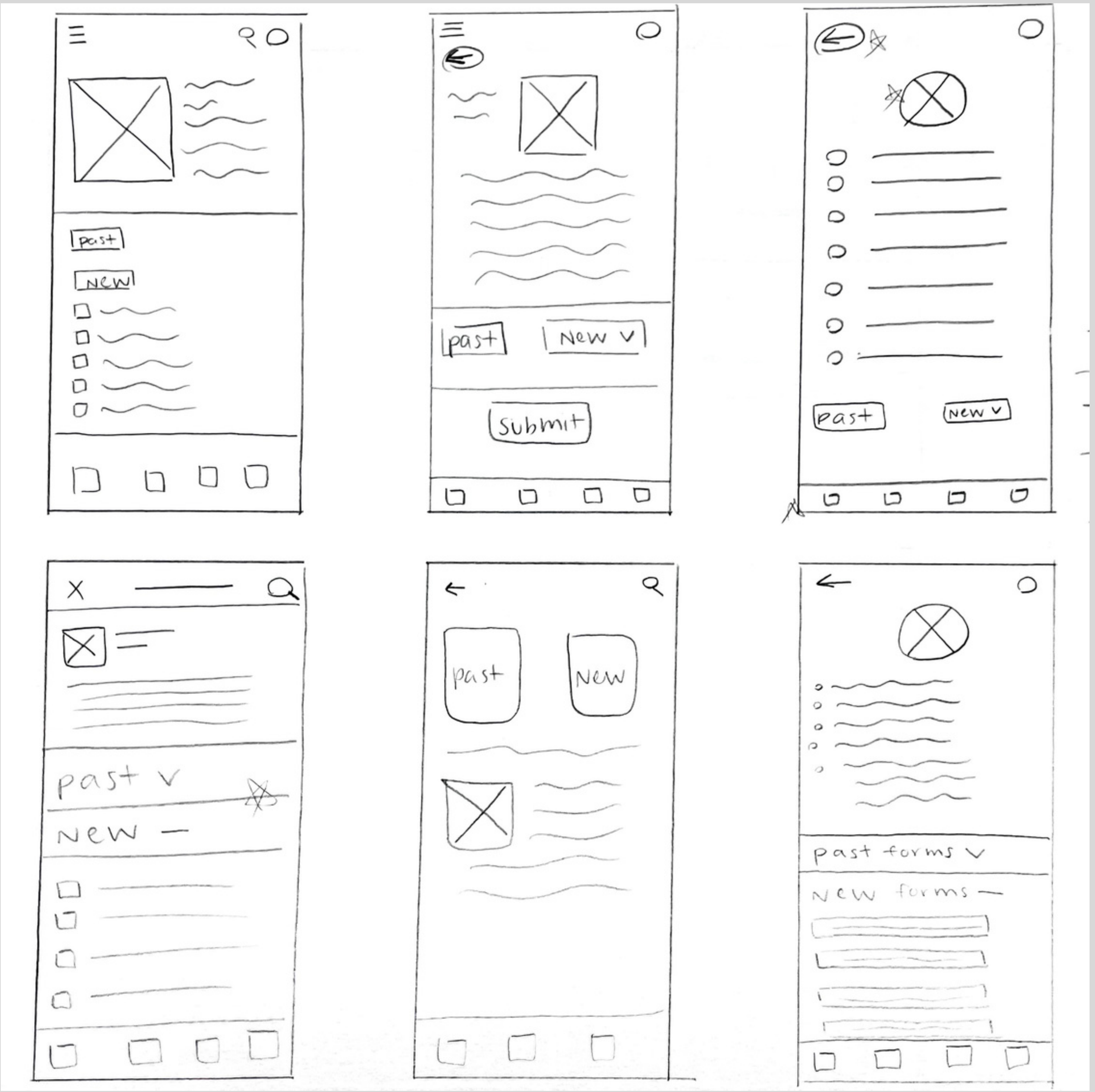
GOAL: A straightforward way to validate and submit insurance claims to make the process faster and accommodate his dyslexia.

Action	Client pays at the end of the session	Create insurance claim	Submit claim	Claim denied over typos	Redo claim till approval
Task List	A. Collect co-pay at the end of the session (accepts cash or check) B. Track how much they paid	A. Fill out paperwork B. Reread it multiple times C. Monitor who has paid what already	A. Submit online B. Wait for approval C. Wait for payment from insurance company	A. Receive news that claim is denied B. Payment is also delayed	A. Redo the claim B. Go through each line with someone else to check for typos C. Re-submit and wait for payment
Emotions	- At ease	- Overwhelmed - Stressed	- Anxious - Uneasy	- Upset - Disappointed	- Annoyed
Improvement Opportunities	- Online payment options for clients who forget cash or check - Database to track who has paid	- Auto claim system	- Submit in batches and track progress	- Have a validation system to prevent submitting with errors	- Expedite payment

STARTING THE DESIGN

- PAPER WIREFRAMES
- DIGITAL WIREFRAMES
- LOW-FIDELITY PROTOTYPE
- USABILITY STUDIES

PAPER WIREFRAMES



Stars marked elements to be used in initial digital wireframes

I began by drafting five versions of each screen on paper. The image on the left shows paper wireframes for the client profile/form selection screen. The wireframe on the bottom right served as a guide for my first digital wireframe and was created by combining the elements from the other drafts to create a screen best suited to the user's needs. The client profile and form selection included clear access to clients' personal information and an easy-to-read selection of forms organized by past and new forms.

DIGITAL WIREFRAMES

I designed the home screen with the intention of every user group being able to customize it to their needs and providing therapists with an overview of their current finances.

EASY ACCESS SHORTCUTS

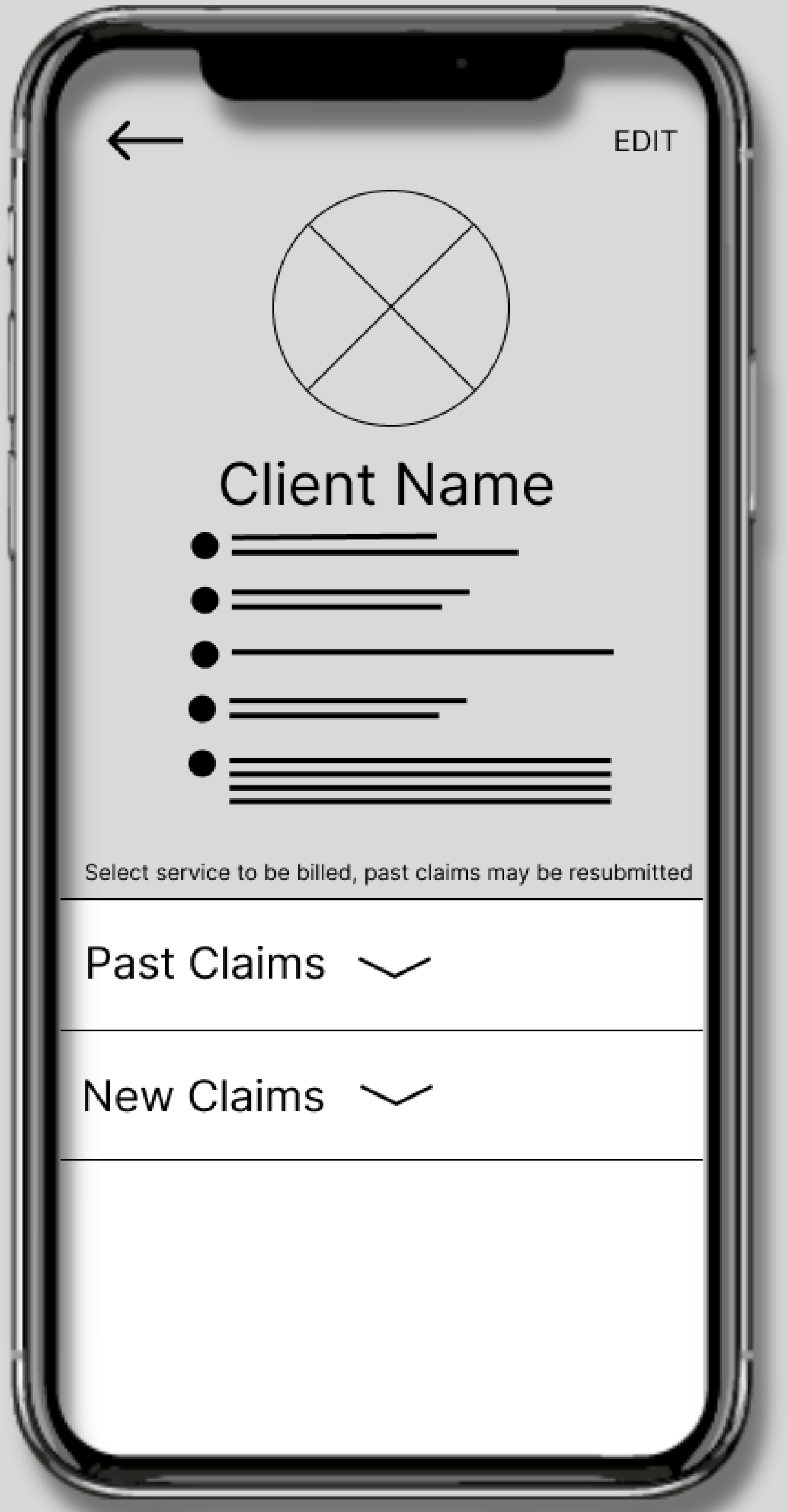
The user can customize their home screen shortcuts to access their most used functions upon opening the app

QUICK SUMMARY

Users can easily monitor payment from clients and insurance companies from the home screen

DIGITAL WIREFRAMES

The client profile page helps keep track of client info and is a part of the user flow in submitting an insurance claim. I wanted to keep this page clean despite having much information the user may need.



IMPORTANT INFO

Users have a comprehensive overview of all client info necessary for submitting an insurance claim and the option to edit the profile

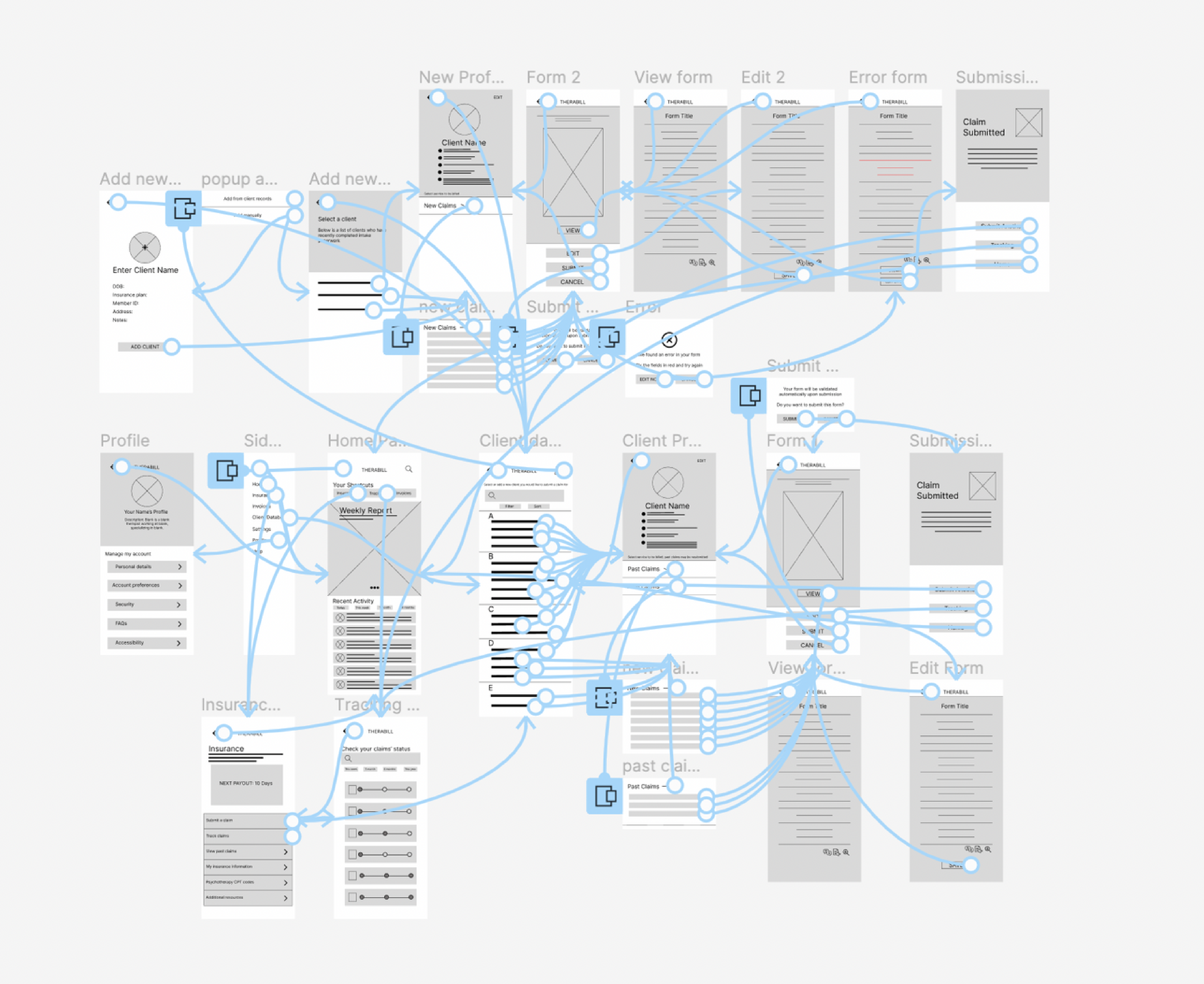
FORM SELECTION

Users can easily choose between resubmitting past claims or selecting a new form

LOW-FIDELITY PROTOTYPE

This prototype contains two user flows inspired by the user group of new therapists who need an easy way to submit insurance claims through the app.

The first user flow is selecting a client and submitting an insurance claim. The second is adding a new client, submitting the claim, and editing and resubmitting the claim after the validation system finds an error. These two flows were tasks in my usability study and gave users more insight into the app's functionality.



[Link to low-fidelity prototype]

USABILITY STUDY FINDINGS

ROUND 1

1. Users should have access to the client database before starting the submission process
2. Create a more straightforward way to add a new client
3. Pop-up messages need to have more variability and be clearer

ROUND 2

1. Some of the typography is too small or users to read clearly
2. Create a more straightforward way to move back in the user flow

REFINING THE DESIGN

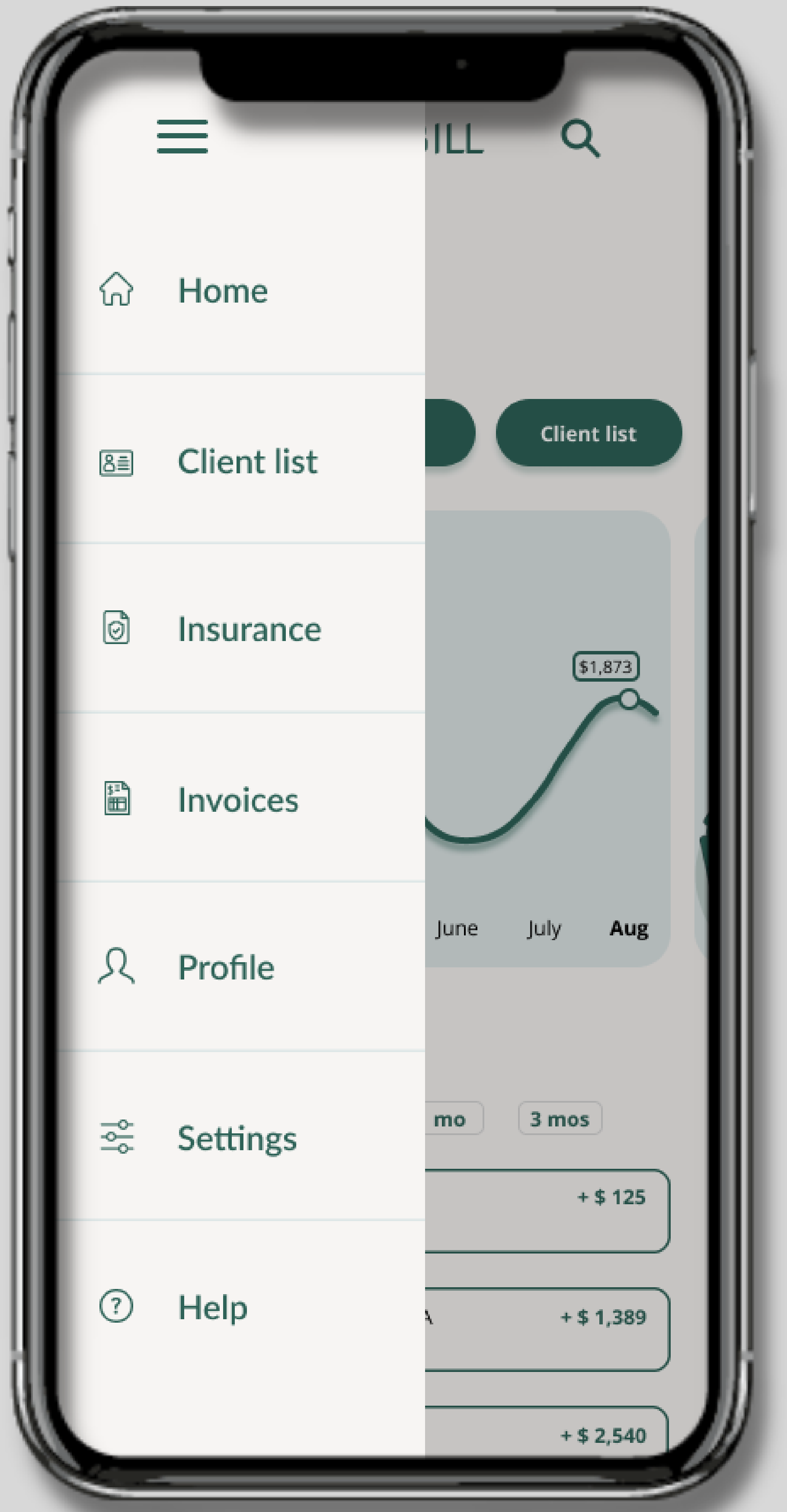
- MOCKUPS
- HIGH-FIDELITY PROTOTYPE
- ACCESSIBILITY

MOCKUPS

With user feedback in mind, I added a separate tab leading to the client database. In addition, I spaced out the items in the side navigation menus and added icons to make it easier to see where each tab leads.

BEFORE USABILITY STUDIES

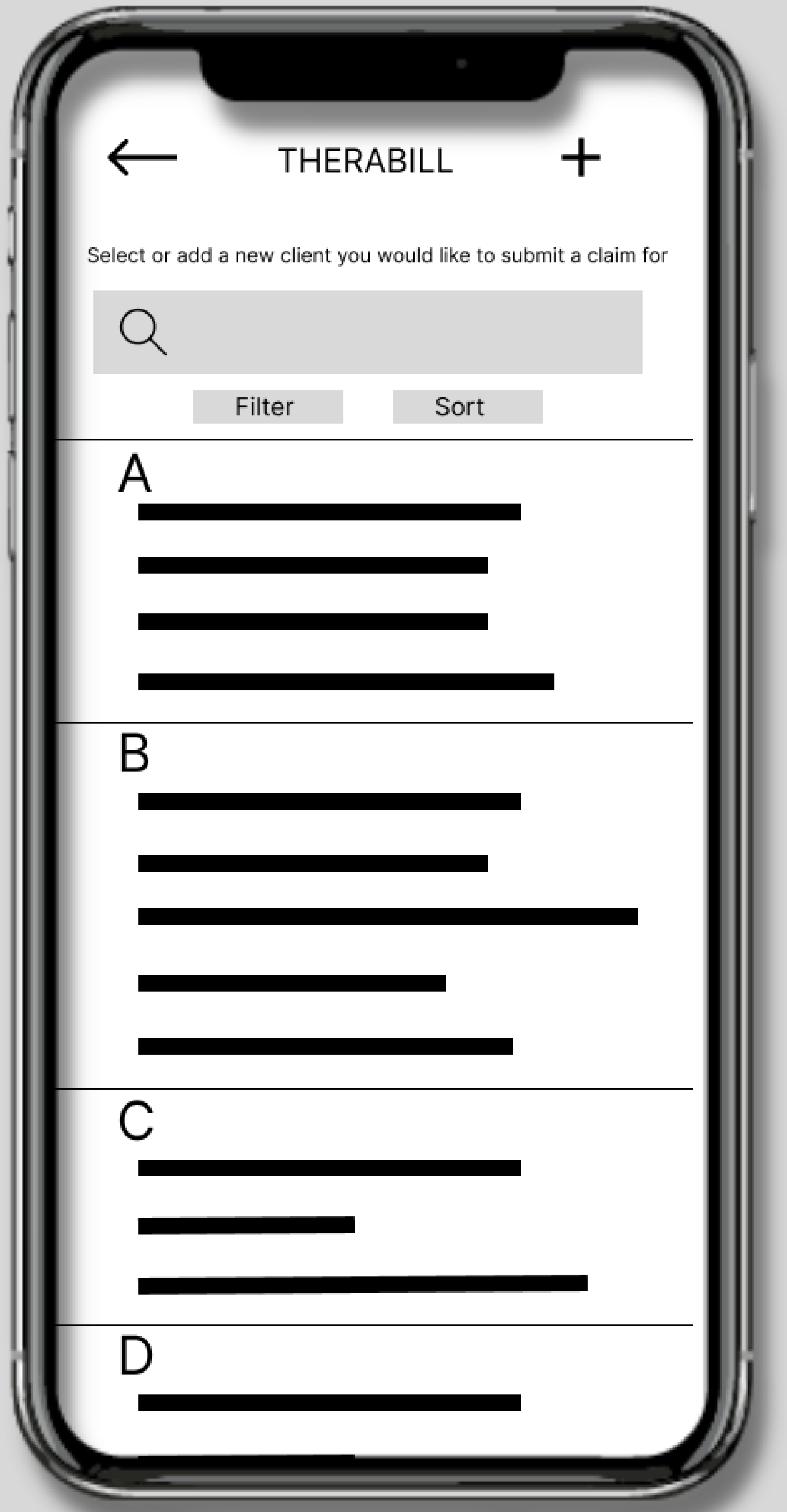
AFTER USABILITY STUDIES



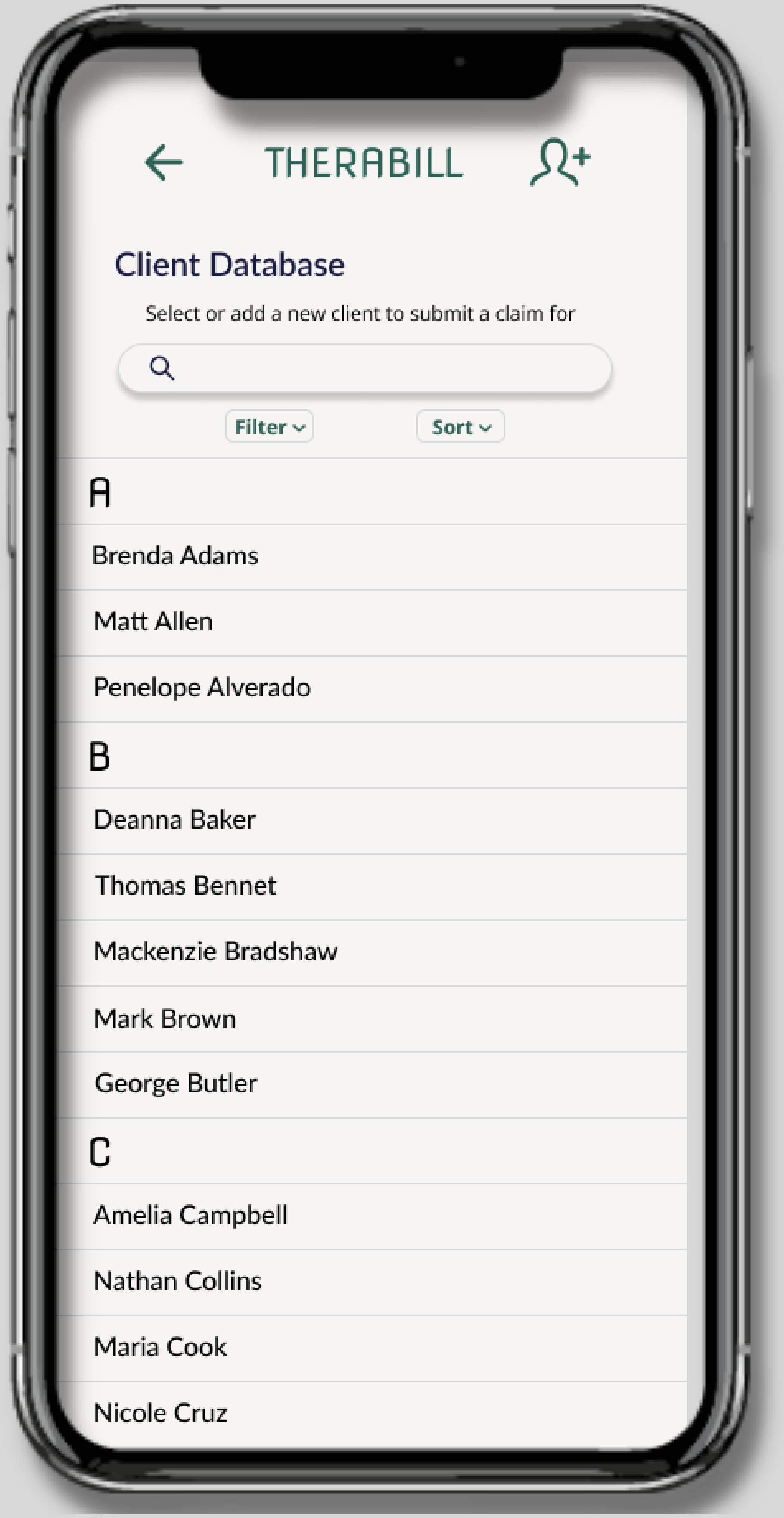
MOCKUPS

This is the client selection page, the second step to submitting an insurance claim. Usability studies found that adding a new client was difficult for most users. To clarify the process, I added an add person icon instead of the plus, and in the second usability study, none of the participants struggled with the task.

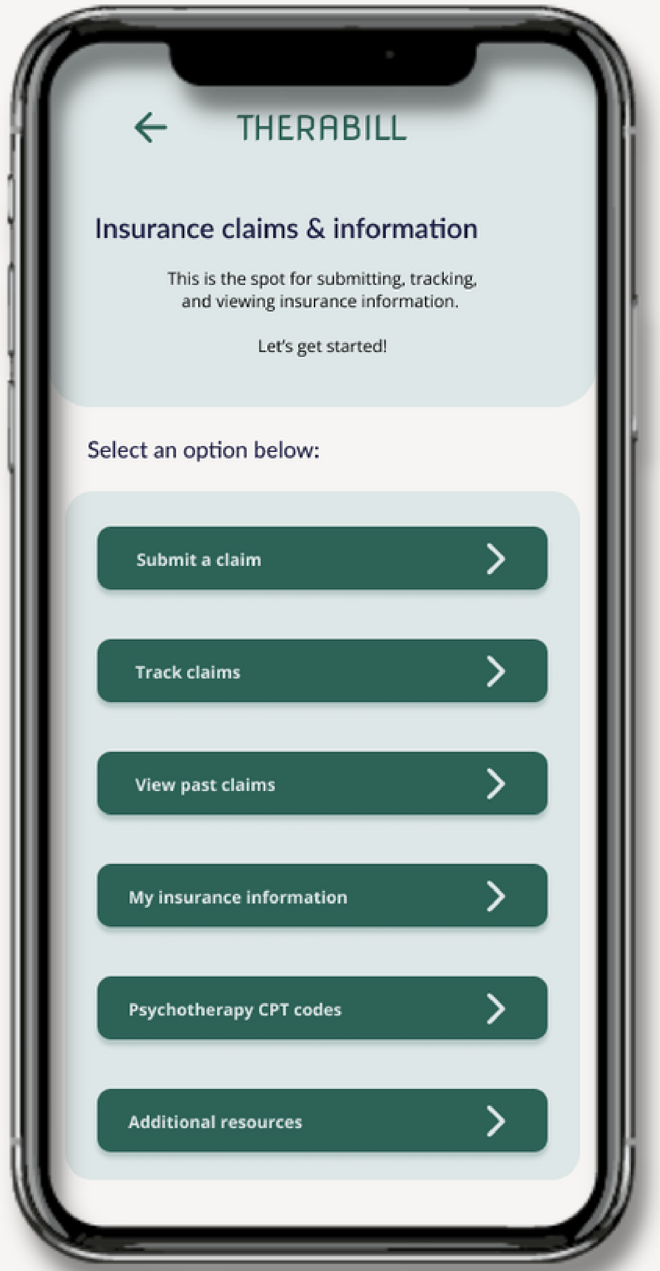
BEFORE USABILITY STUDIES

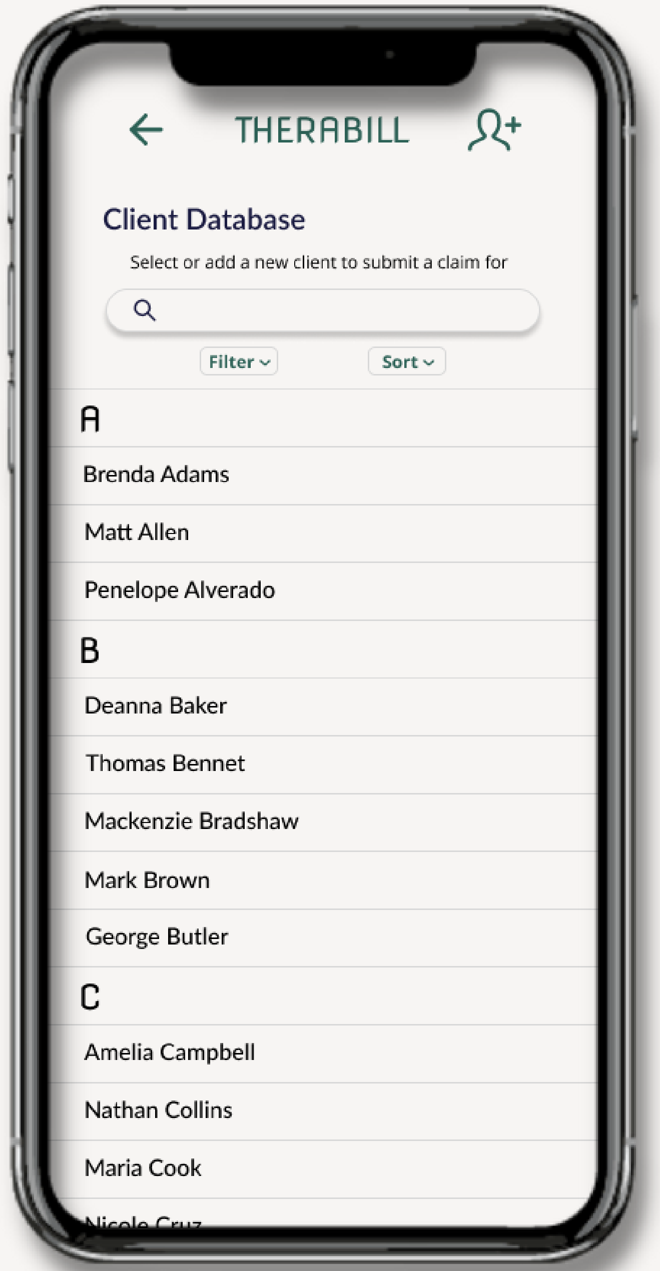


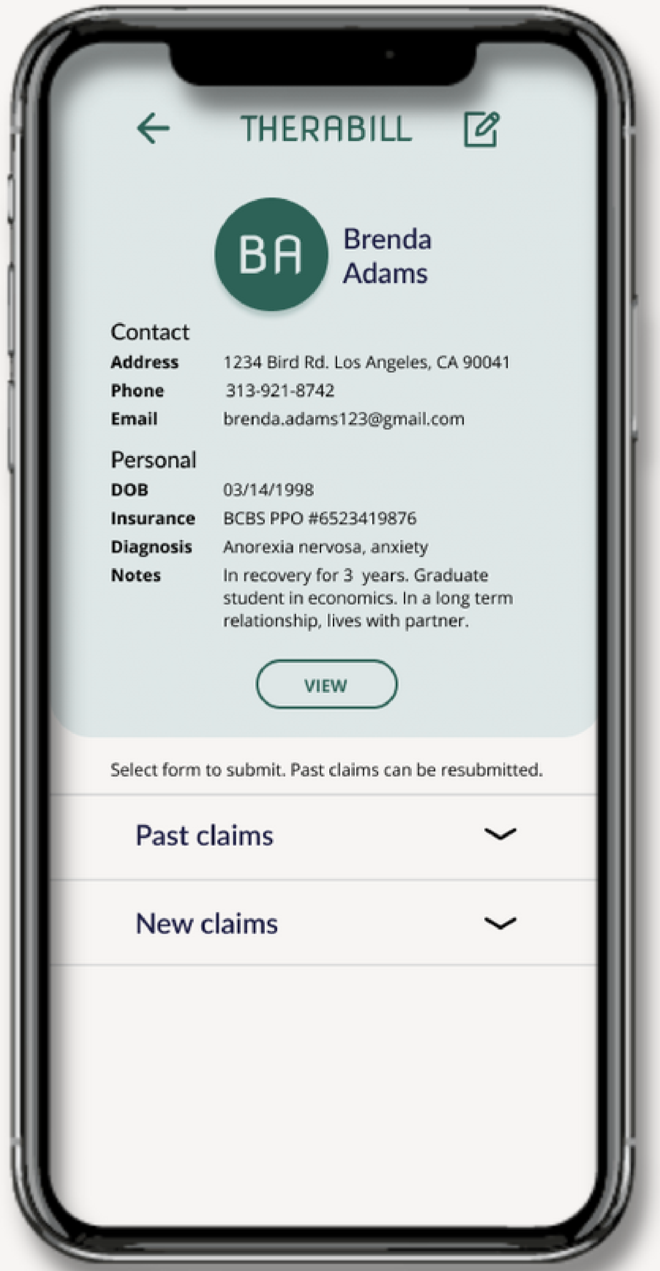
AFTER USABILITY STUDIES



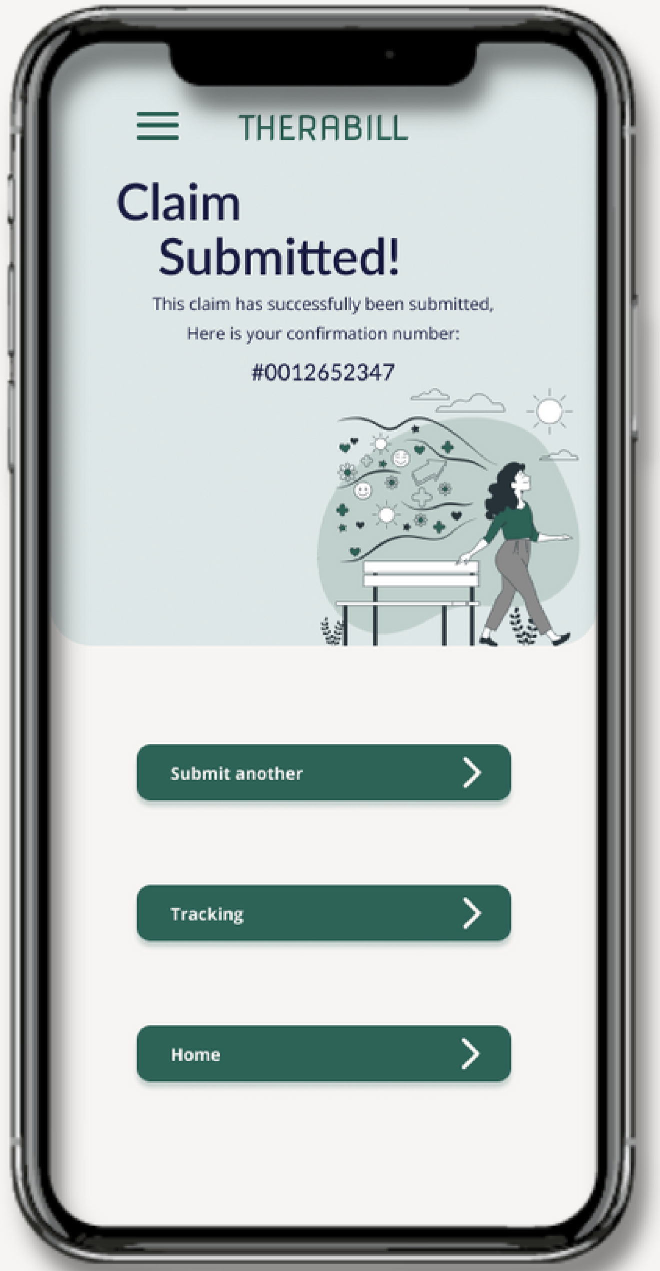
KEY MOCKUPS


THERABILL
Insurance claims & information
This is the spot for submitting, tracking, and viewing insurance information.
Let's get started!
Select an option below:
Submit a claim
Track claims
View past claims
My insurance information
Psychotherapy CPT codes
Additional resources


THERABILL
Client Database
Select or add a new client to submit a claim for
Filter
Sort
A
Brenda Adams
Matt Allen
Penelope Alverado
B
Deanna Baker
Thomas Bennet
Mackenzie Bradshaw
Mark Brown
George Butler
C
Amelia Campbell
Nathan Collins
Maria Cook

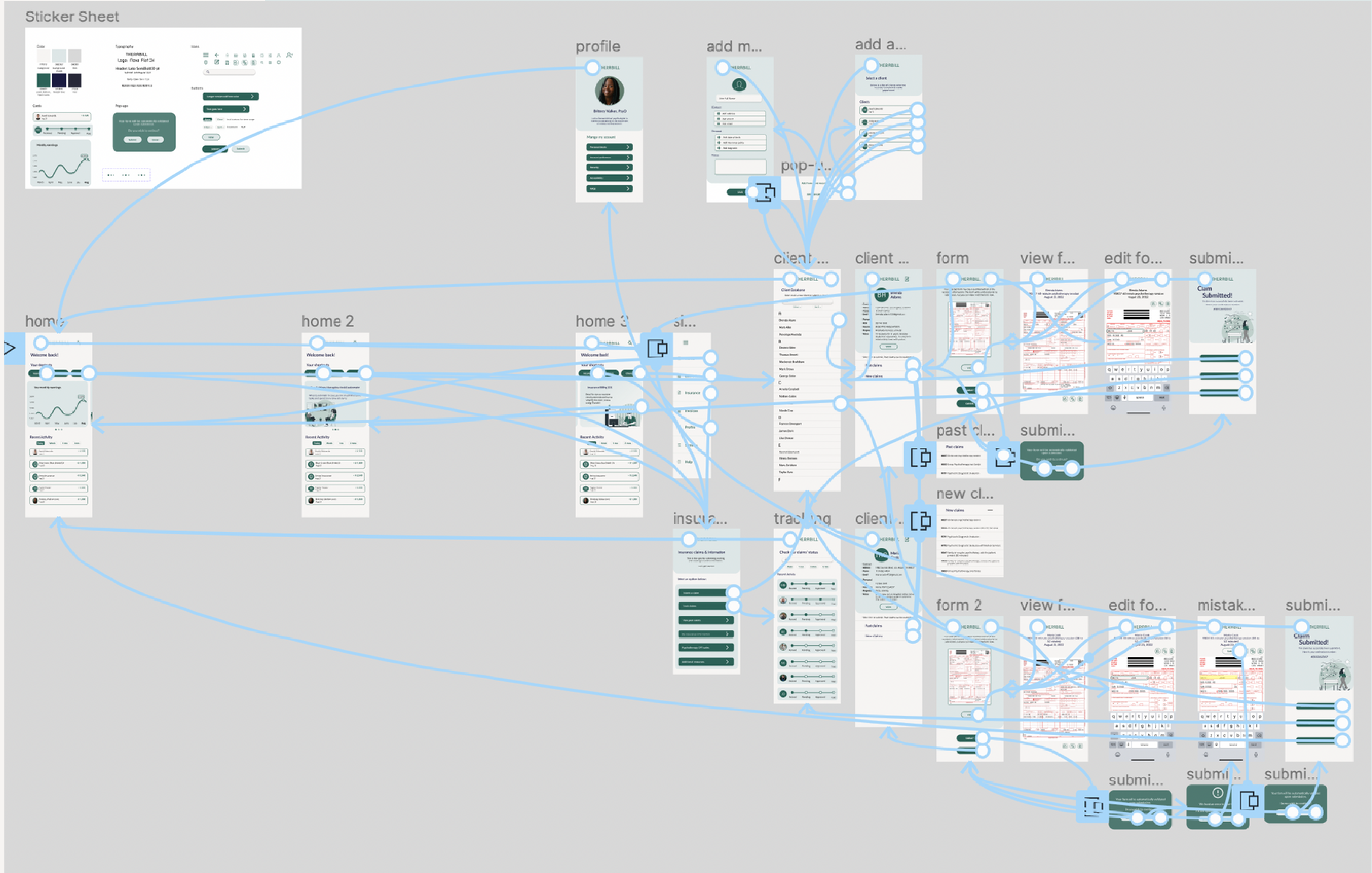

THERABILL
BA
Brenda Adams
Contact
Address 1234 Bird Rd. Los Angeles, CA 90041
Phone 313-921-8742
Email brenda.adams123@gmail.com
Personal
DOB 03/14/1998
Insurance BCBS PPO #6523419876
Diagnosis Anorexia nervosa, anxiety
Notes In recovery for 3 years. Graduate student in economics. In a long term relationship, lives with partner.
VIEW
Select form to submit. Past claims can be resubmitted.
Past claims
New claims


THERABILL
Your selected form has been autofilled with all of the necessary information. The form will be validated prior to submission, but you can view or edit the form now.
VIEW
SUBMIT
CANCEL


THERABILL
Claim Submitted!
This claim has successfully been submitted. Here is your confirmation number:
#0012652347
Submit another
Tracking
Home

HIGH-FIDELITY PROTOTYPE

The final high-fidelity prototype contains cleaner user flows for submitting an insurance claim with multiple starting points, adding new clients to the database, and fixing forms with detected errors.



[Link to high-fidelity prototype]

ACCESSIBILITY CONSIDERATIONS

1

MAGNIFICATION

Forms and documents can be tricky to read on mobile devices. I added a magnification tool to each form viewing and editing page to assist users.

2

TRANSLATE

I added translate icons to indicate that the forms can be translated into different languages to make the app more accessible.

3

TEXT-TO-SPEECH

I also wanted to accommodate others by adding text-to-speech icons to indicate that the form can be read aloud.

4

AUTO-VALIDATE

To avoid form submissions with minor errors, the app will automatically validate forms and direct users to corrections if necessary.

GOING FORWARD

- TAKEAWAYS
- NEXT STEPS

TAKEAWAYS

IMPACT

This app gives therapists the resources to fulfill administrative tasks with ease to see a broader range of clients and spend more time in sessions instead of working on billing.

WHAT I LEARNED

I learned the importance of receiving feedback and iterating on designs to create an app that meets users' actual needs and will be helpful for the greatest amount of users.

NEXT STEPS

1

Begin designing user flows for creating invoices, accepting client payments, and sending payment reminders.

2

Conduct another usability study to determine whether user pain points are resolved through current app functionality.

LET'S CONNECT!

Thank you for reviewing my app design. Reach out if you'd like to see more.

E-MAIL:
raya.shoilekova@gmail.com

DRIBBBLE:
https://dribbble.com/rayashoi

BEHANCE:
https://www.behance.net/rayashoilekova