Account Completion

Contact & Demographic Information

Overview

The purpose of the Account Completion feature is to gather required Pathfinder information on a Pathfinder's first login. The fields are currently divided between 3 forms that appear on the hometab one after another as you complete the one before it. Most fields in these forms are required, although a few are optional. The feature is set up in such a way that every time a Patfhinder logs in, if any required information is missing, the form containing that field is shown to the user on their hometab.

The Goals of the Account Completion functionality are:
- Collect Pathfinder demographic information IN our product.
- Provide a UX at least as good as Typeform (legacy survey tool we used).
- The entered information should populate the Pathfinder's account automatically.
- Ensure that all required information is present or request the information when the Pathfinder logs in.

Use Cases

New Users

A Pathfinder signs up through the marketing website, creates their account and logs in for the first time. At this point, all we know about them is their first and last name, email, DoB, and condition. When they log in for the first time, we will take them through 3 screens that will collect all of our required demographic information. (more on these later) The information collected populates the Pathfinder's account page and is visible and editable by the Pathfinder and User Admins.
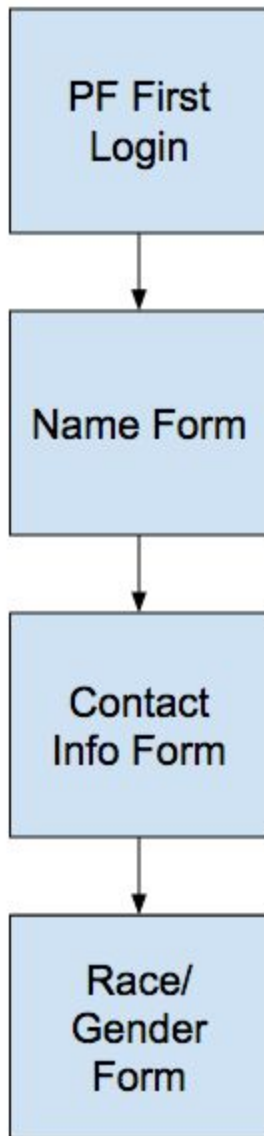
Existing Users

An Existing pathfinder who joined before the Account Completion feature logs in for the first time since we have implemented it. Upon logging in, the system checks to see if all required demographic fields are present and determines that this Pathfinder's account is missing address and contact number information (we didn't keep this information in the product previously).

Non-Goals/Open Issues

- This feature does not collect provider information as the TypeForm did. This is handled by our Provider Request Feature.

Screen Specification

High Level Flow

```
┌─────────────┐
│  PF First   │
│   Login     │
└─────────────┘
       │
       ▼
┌─────────────┐
│             │
│ Name Form   │
│             │
└─────────────┘
       │
       ▼
┌─────────────┐
│             │
│  Contact    │
│ Info Form   │
│             │
└─────────────┘
       │
       ▼
┌─────────────┐
│   Race/     │
│  Gender     │
│   Form      │
└─────────────┘
```

Pathfinder Home Tab

The majority of user interaction with this feature occurs on the Pathfinders home tab. If a pathfinder (at any point, not just on first login) logs in and they are missing mandatory information, they are presented with a form that asks them for it on the homepage.

Name Screen

Get started with Betterpath

Tell us a bit about you — we'll ask just enough to get going — and we'll start building your better health story!

Name

test	Middle	test

But call me...

test

Previous Names

Ever used a different name on anything healthcare-related? Include it here.
Have you used more than one? Just separate each full name with a comma.

Date of birth: Sep 23, 1976

Not your birthday? Email us and we'll fix that for you!

Save   You can always update this info later in your account.

The first name, last name, preferred name, and date of birth are pre-filled with the information from the signup form. All fields are required except middle name, and previous names.

Contact Information Screen

Get started with Betterpath

Tell us a bit about you — we'll ask just enough to get going — and we'll start building your better health story!

Contact Information

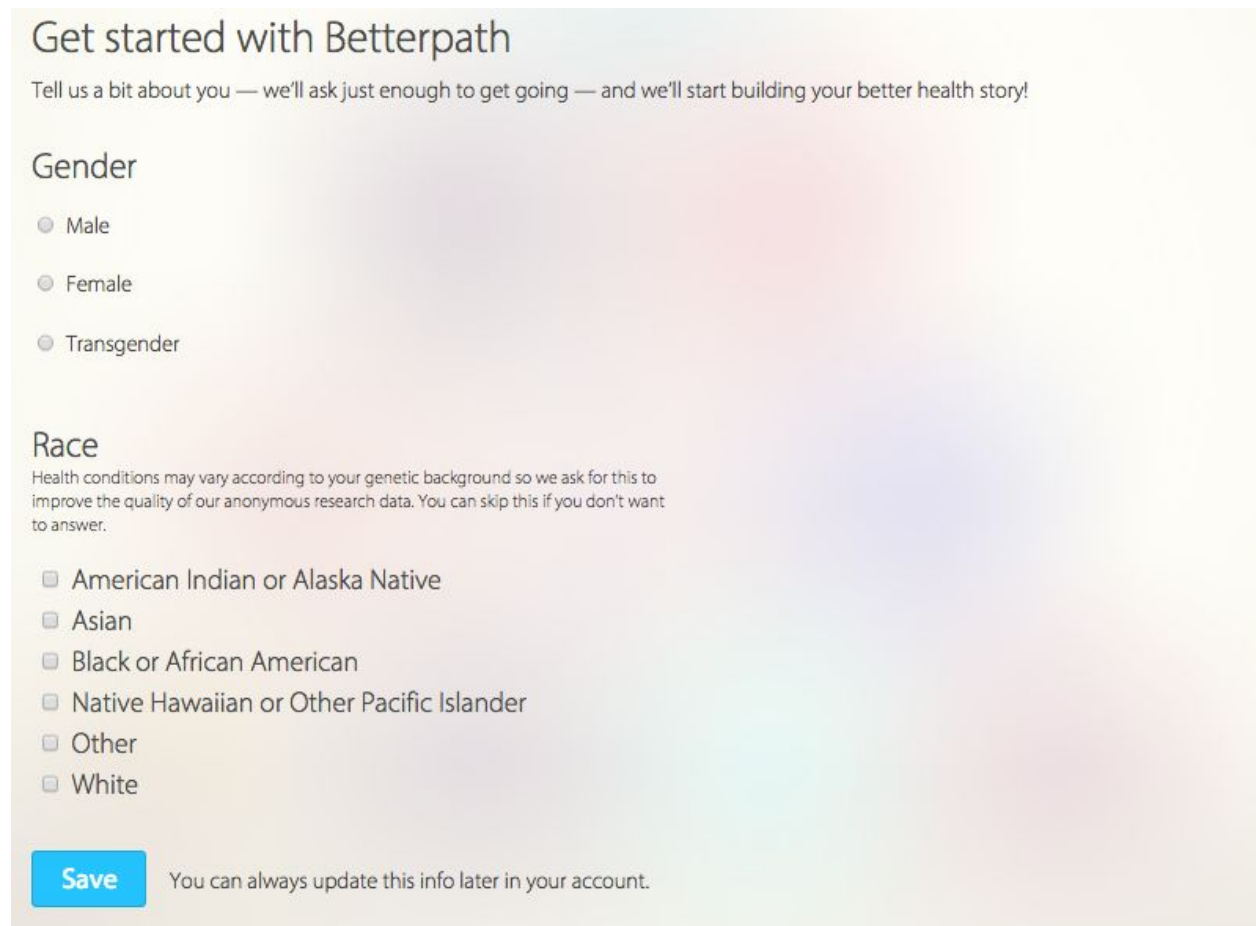Providers need this information to release your records.

Address line 1

Address line 2

City

State ▾   Zip/Postal

United States ▾

+1 (United States) ⇕   (201) 555-5555

Save   You can always update this info later in your account.

All fields are mandatory except Address line 2.

Race/Gender Screen

The only mandatory field is Gender. Clicking "Transgender" exposes 2 new radio buttons that allow the user to choose male to female or female to male.

Pathfinder Account Page

All of the fields collected in the above 3 forms are present in the Pathfinder's account page. It is visible by Pathfinders and User Admins.