



Enterprise Eligibility & Individual Identity Initiative

Product: Common Intake Platform (CIP)

Lead UX Designer: Amy Ehlers

What challenges are we facing?

Every line of business uses different people, processes, and systems for individual identity data and eligibility.

Data is managed in many places with different standards, quality, and processes.

Attempts to access and use an individual's data across different applications and solutions to serve customers create data gaps, conflicts, negative experiences, lost opportunities, and waste.

230+ Employees (\$23M+)

Managing Eligibility Processes

300,000+ (\$2M+)

Security Collisions & Fines / Year

25+ Applications

Duplicate Technology

1.5M+

Login & Registration Issues / Year

200,000+

Eligibility Issues Contacts / Year

Customers

The data and reporting looks wrong.

I thought you had this data already. How is this different?

I don't want to use SSN and expose data.

Members

This isn't correct. Why did you deny my claim?

My incentives are all wrong. Where's my rewards?

I'm seeing someone else's information!

How do we address those challenges?

Create an Enterprise Common Intake Platform (CIP)

Unite United Healthcare (Enterprise and Individual), Optum Health, Optum RX, Optum Financial Optum Care, and C&S (Medicare, Medicaid) lines of businesses.

Consolidate systems, unique and complex workflows, and roles.

Standardize file data intake and validation and centralize storage.

Savings Over a 5 Year Period



Address 5.4M+
Member Identity Issues



\$996K - \$3.4M Savings in
Reduced Managed Issues



\$2M - \$22M Reduction in
Fines and Fees



Eliminate 457k+ Eligibility
Registration Failures



\$1.5 - \$4.6M Drive Savings
in Security Incidents



Address 5.4M+ Reduction In
Member Service Contacts

What are the UX design challenges?

Lacked documentation - User interviews, examination of current processes, and business requirements were sparse.

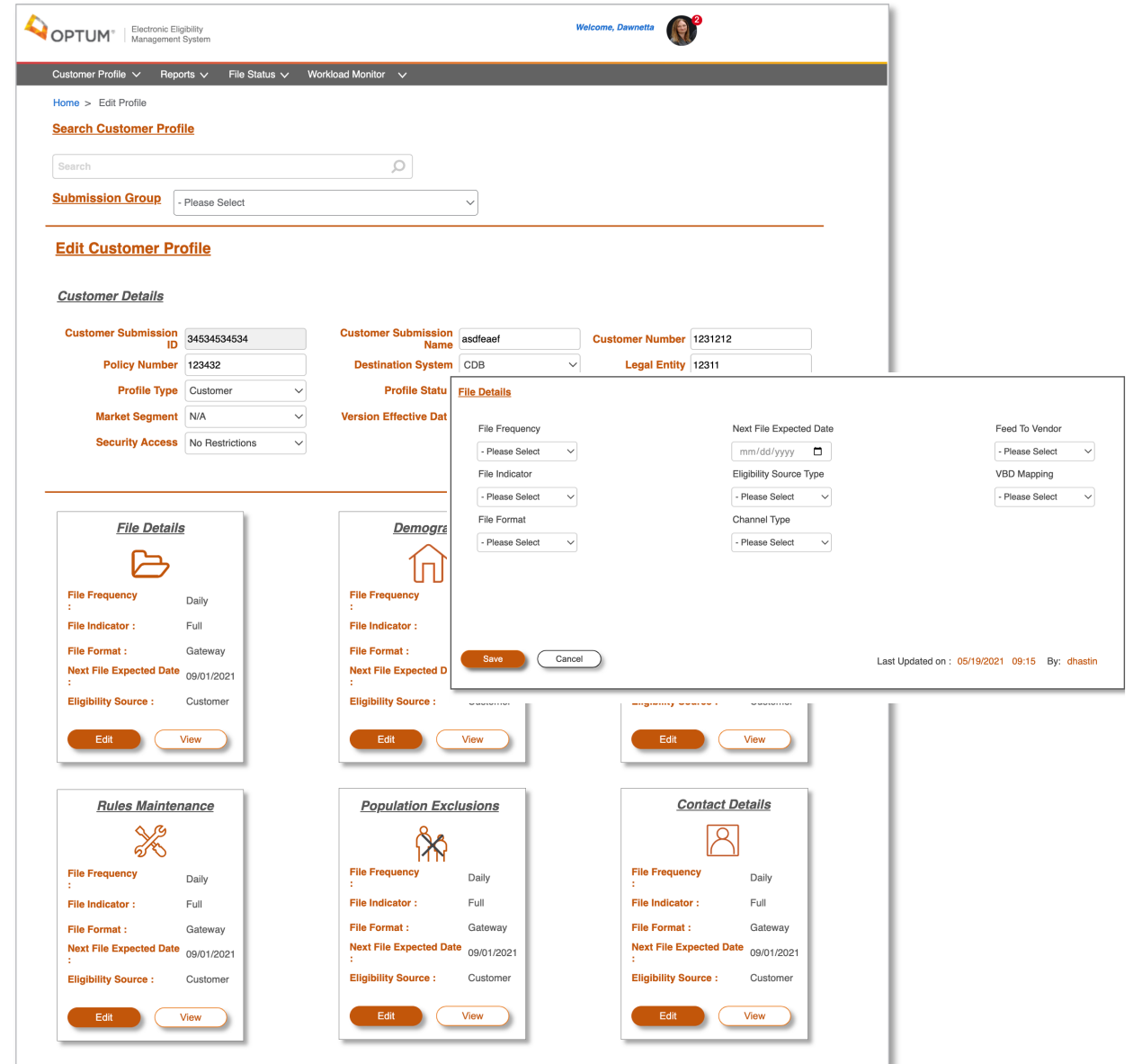
No roadmap - Teams were in a constant reactive state. Solutions were piecemealed instead of creating workflows to help users achieve their goals.

Micromanaged - Everything was funneled through the product owner, impeding collaboration and innovation.

Rushed builds - The application was being built according to IT's specifications (fast and easy for them), not business requirements or user needs.

Poor designs - Designs were created by a BA (business analyst) familiar with UX design but lacking expertise.

Politics - The project has gone through three design systems. The current one is still in beta. A year and a half into the project, IT decided all design work should switch from Axure to Figma.



My UX design journey

Performed Heuristic Reviews - I explored EEMS, a United Healthcare application that would be the springboard for CIP.

Conducted Interviews - Met with teams responsible for onboarding new clients and validating file data (eligibility, pharmacy, lab, etc.).

Mapped IA and workflows - Understanding Information architecture and flows was crucial for achieving user goals.

Iterated Designs - I reviewed Axure and Figma designs weekly with stakeholders and subject matter experts.

Mentored - I guided the BA (Jr. UX designer) on design best practices when utilizing the design systems and how to move past the “what” and into the “why” when meeting with stakeholders.

Field Changes - Summary and Details

Summary
Field Type (Grouped by)

- Demographic
- Mailing Address
- Permanent Address
- Medical Coverage
- Provider

Successful Count

- Identifies the field being changed.
- Contains transactions that have no errors or have warnings (severity 4 and 5 sends). For transaction sets that exceed thresholds, this count will include transactions that have a status of Ready or Ready with Warnings.

Error Count

- Contains transactions that have severity 1, 2, or 3 errors.

Data Field Details
Severity

- No code for Successes

Employee ID

- Spouses and Dependents share Subscriber/Employee ID

Name

- Separate into Last Name, First Name, Middle Initial

Relationship

- Subscriber, Spouse, Dependent

Coverage Type

- Blank for all except for Severity 3 errors?

Status

- SOURCE_ERR for all except for Severity 3 errors?
- COMPLETE or COMPLETED WITH WARNINGS - Successes

Type

- CHANGE for Errors
- AUTO-COMLETE - Successes

Error Name

- CBD Validation Error
- Blank for Successes
- SSN Missing or Invalid - COMPLETED WITH WARNINGS - Successes

Data Field

- Listed on Summary

Data Prior to Processing

- Unique

Data After Processing

- Unique

Detail

- Links to member profiles with highlighted errors

Field Change Summary

File Details
Customer Submission Group: WELLS FARGO 5010
Processing Date: 09/27/2021 09:23
Processing Status: Cmpl_Repr_Part_With_Err

Field Type	Data Field	Successful Count	Error Count
Demographic	Member Last Name	0	233
	Member First Name	0	233
	Member Middle Name	0	127
	Member Gender	0	114
	Member Marital Status	0	143
	Employee Personnel Id	0	233
	Tic Relationship	0	7
	Member Birth Date	0	233
	Retirement Date	0	7
	Employment Date	0	0
Member Race	3	0	
Member Utility 3	0	154	
Common Utility 1	0	224	

Error Counts

Member Last Name Field Change Transactions
Customer Submission Group: WELLS FARGO 5010
Processing Date: 09/27/2021 09:23
Processing Status: Cmpl_Repr_Part_With_Err

Primary Key	Employee ID	Secondary Key	Relationship Code	Start	End					
1	18759465	AGUSTY, MARCELLA	18	SOURCE_ERR	CHANGE	CBD Validation Error	Member Last Name	MEMBER	09/27/2021	09/27/2021
1	18759462	WOLF, SHAY	18	SOURCE_ERR	CHANGE	CBD Validation Error	Member Last Name	MEMBER	09/27/2021	09/27/2021
1	18450494	FISHER, LILLIAN	18	SOURCE_ERR	CHANGE	CBD Validation Error	Member Last Name	DEPENDENT	09/27/2021	09/27/2021
1	18486400	ERIC, KATHARINA	18	SOURCE_ERR	CHANGE	CBD Validation Error	Member Last Name	DEPENDENT	09/27/2021	09/27/2021
1	22022289	PIRANI, KHYRISU	18	SOURCE_ERR	CHANGE	CBD Validation Error	Member Last Name	DEPENDENT	09/27/2021	09/27/2021
1	22022290	RODRIGUEZ, LEE	18	SOURCE_ERR	CHANGE	CBD Validation Error	Member Last Name	DEPENDENT	09/27/2021	09/27/2021
1	22022291	RODRIGUEZ, ROSA	18	SOURCE_ERR	CHANGE	CBD Validation Error	Member Last Name	DEPENDENT	09/27/2021	09/27/2021
1	18971208	DUNN, WARRIANA	18	SOURCE_ERR	CHANGE	CBD Validation Error	Member Last Name	DEPENDENT	09/27/2021	09/27/2021
1	18971209	HADE, TROY	18	SOURCE_ERR	CHANGE	CBD Validation Error	Member Last Name	DEPENDENT	09/27/2021	09/27/2021
1	18971210	BERNAL, HASSA	18	SOURCE_ERR	CHANGE	CBD Validation Error	Member Last Name	DEPENDENT	09/27/2021	09/27/2021

Member First Name Field Change Transactions

Customer Submission Group: WELLS FARGO 5010
Processing Date: 09/27/2021 09:23
Processing Status: Cmpl_Repr_Part_With_Err

Primary Key	Employee ID	Secondary Key	Relationship Code	Start	End					
1	18971245	AGUSTY, MARCELLA	18	SOURCE_ERR	CHANGE	CBD Validation Error	Member First Name	MEMBER	09/27/2021	09/27/2021
1	18971246	WOLF, SHAY	18	SOURCE_ERR	CHANGE	CBD Validation Error	Member First Name	MEMBER	09/27/2021	09/27/2021
1	18450494	FISHER, LILLIAN	18	SOURCE_ERR	CHANGE	CBD Validation Error	Member First Name	DEPENDENT	09/27/2021	09/27/2021
1	18486400	ERIC, KATHARINA	18	SOURCE_ERR	CHANGE	CBD Validation Error	Member First Name	DEPENDENT	09/27/2021	09/27/2021
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1	22022291	RODRIGUEZ, ROSA	18	SOURCE_ERR	CHANGE	CBD Validation Error	Member First Name	DEPENDENT	09/27/2021	09/27/2021
1	18971208	DUNN, WARRIANA	18	SOURCE_ERR	CHANGE	CBD Validation Error	Member First Name	DEPENDENT	09/27/2021	09/27/2021
1	18971209	HADE, TROY	18	SOURCE_ERR	CHANGE	CBD Validation Error	Member First Name	DEPENDENT	09/27/2021	09/27/2021
1	18971210	BERNAL, HASSA	18	SOURCE_ERR	CHANGE	CBD Validation Error	Member First Name	DEPENDENT	09/27/2021	09/27/2021

Successful Count

Member Race Field Change Transactions
Customer Submission Group: WELLS FARGO 5010
Processing Date: 09/27/2021 09:23
Processing Status: Cmpl_Repr_Part_With_Err

Primary Key	Employee ID	Secondary Key	Relationship Code	Start	End	
1	48132420	RODRIGUEZ, LETICIA	18	COMPLETE	AUTO-CANCEL	Member R
1	48131543	WOLF, LINDSEY	18	COMPLETE	AUTO-CANCEL	Member R

Rows Returned: 2 Resulting From 112976 Total Transactions

Successful and Error Count

Type: Auto-Cancel = Successful
Type: Change = Error

Certification Date Field Change Transactions
Customer Submission Group: WELLS FARGO 5010
Processing Date: 09/27/2021 09:23
Processing Status: Cmpl_Repr_Part_With_Err

Primary Key	Employee ID	Secondary Key	Relationship Code	Start	End				
1	00159249	LARSEN, JACQ	18	COMPLETE	WITH WARNINGS	AUTO-CANCEL	Member R	09/27/2021	09/27/2021
1	00159250	DOUG, MARGARET	18	COMPLETE	AUTO-CANCEL	Member R	09/27/2021	09/27/2021	
1	00159251	PRECHAL, THERESA	18	COMPLETE	AUTO-CANCEL	Member R	09/27/2021	09/27/2021	
1	00159252	RELLI, CHRISTINE	18	COMPLETE	AUTO-CANCEL	Member R	09/27/2021	09/27/2021	
1	00159253	ANDER, JESSICA	18	COMPLETE	AUTO-CANCEL	Member R	09/27/2021	09/27/2021	
1	00159254	ANDER, JESSICA	18	COMPLETE	AUTO-CANCEL	Member R	09/27/2021	09/27/2021	
1	00159255	ANDER, JESSICA	18	COMPLETE	AUTO-CANCEL	Member R	09/27/2021	09/27/2021	
1	00159256	ANDER, JESSICA	18	COMPLETE	AUTO-CANCEL	Member R	09/27/2021	09/27/2021	
1	00159257	ANDER, JESSICA	18	COMPLETE	AUTO-CANCEL	Member R	09/27/2021	09/27/2021	
1	00159258	ANDER, JESSICA	18	COMPLETE	AUTO-CANCEL	Member R	09/27/2021	09/27/2021	
1	00159259	ANDER, JESSICA	18	COMPLETE	AUTO-CANCEL	Member R	09/27/2021	09/27/2021	
1	00159260	ANDER, JESSICA	18	COMPLETE	AUTO-CANCEL	Member R	09/27/2021	09/27/2021	

Rows Returned: 1351 Resulting From 112976 Total Transactions

Certification Date Field Change Transactions

Customer Submission Group: WELLS FARGO 5010
Processing Date: 09/27/2021 09:23
Processing Status: Cmpl_Repr_Part_With_Err

Primary Key	Employee ID	Secondary Key	Relationship Code	Start	End				
1	52641421	BRANDTNER, CALIE	18	SOURCE_ERR	CHANGE	CBD Validation Error	Corpn	09/27/2021	09/27/2021
1	52641422	BRANDTNER, CALIE	18	SOURCE_ERR	CHANGE	CBD Validation Error	Corpn	09/27/2021	09/27/2021
1	52641423	BRANDTNER, CALIE	18	SOURCE_ERR	CHANGE	CBD Validation Error	Corpn	09/27/2021	09/27/2021
1	52641424	BRANDTNER, CALIE	18	SOURCE_ERR	CHANGE	CBD Validation Error	Corpn	09/27/2021	09/27/2021
1	52641425	BRANDTNER, CALIE	18	SOURCE_ERR	CHANGE	CBD Validation Error	Corpn	09/27/2021	09/27/2021
1	52641426	BRANDTNER, CALIE	18	SOURCE_ERR	CHANGE	CBD Validation Error	Corpn	09/27/2021	09/27/2021
1	52641427	BRANDTNER, CALIE	18	SOURCE_ERR	CHANGE	CBD Validation Error	Corpn	09/27/2021	09/27/2021
1	52641428	BRANDTNER, CALIE	18	SOURCE_ERR	CHANGE	CBD Validation Error	Corpn	09/27/2021	09/27/2021
1	52641429	BRANDTNER, CALIE	18	SOURCE_ERR	CHANGE	CBD Validation Error	Corpn	09/27/2021	09/27/2021
1	52641430	BRANDTNER, CALIE	18	SOURCE_ERR	CHANGE	CBD Validation Error	Corpn	09/27/2021	09/27/2021

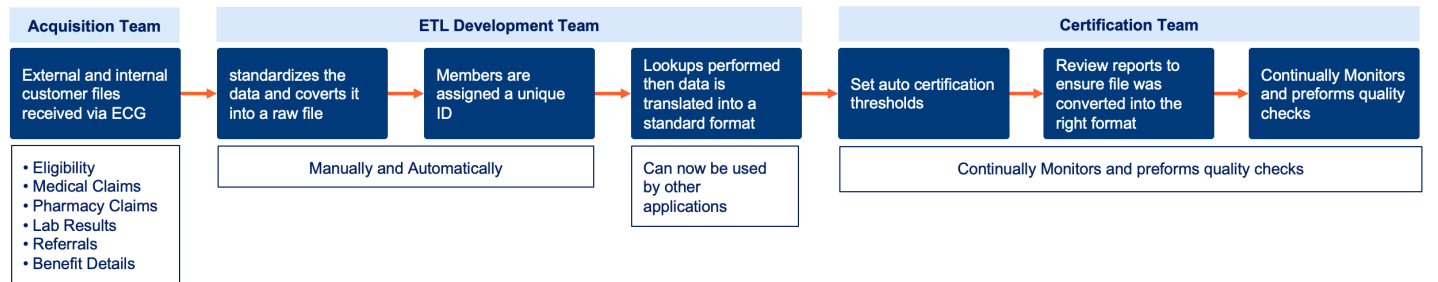
Rows Returned: 1351 Resulting From 112976 Total Transactions

Health Insurance Claim (HIC) Number Field Change Transactions

Customer Submission Group: WELLS FARGO 5010
Processing Date: 09/27/2021 09:23
Processing Status: Cmpl_Repr_Part_With_Err

Primary Key	Employee ID	Secondary Key	Relationship Code	Start	End			
1	53424241	STALE, NIKKI	18	COMPLETE	AUTO-CANCEL	Health Insurance Claim	09/27/2021	09/27/2021
1	53424242	STALE, NIKKI	18	COMPLETE	AUTO-CANCEL	Health Insurance Claim	09/27/2021	09/27/2021
1	53424243	STALE, NIKKI	18	COMPLETE	AUTO-CANCEL	Health Insurance Claim	09/27/2021	09/27/2021
1	53424244	STALE, NIKKI	18	COMPLETE	AUTO-CANCEL	Health Insurance Claim	09/27/2021	09/27/2021
1	53424245	STALE, NIKKI	18	COMPLETE	AUTO-CANCEL	Health Insurance Claim	09/27/2021	09/27/2021
1	53424246	STALE, NIKKI	18	COMPLETE	AUTO-CANCEL	Health Insurance Claim	09/27/2021	09/27/2021
1	53424247	STALE, NIKKI	18	COMPLETE	AUTO-CANCEL	Health Insurance Claim	09/27/2021	09/27/2021
1	53424248	STALE, NIKKI	18	COMPLETE	AUTO-CANCEL	Health Insurance Claim	09/27/2021	09/27/2021
1	53424249	STALE, NIKKI	18	COMPLETE	AUTO-CANCEL	Health Insurance Claim	09/27/2021	09/27/2021
1	53424250	STALE, NIKKI	18	COMPLETE	AUTO-CANCEL	Health Insurance Claim	09/27/2021	09/27/2021

Rows Returned: 1351 Resulting From 112976 Total Transactions

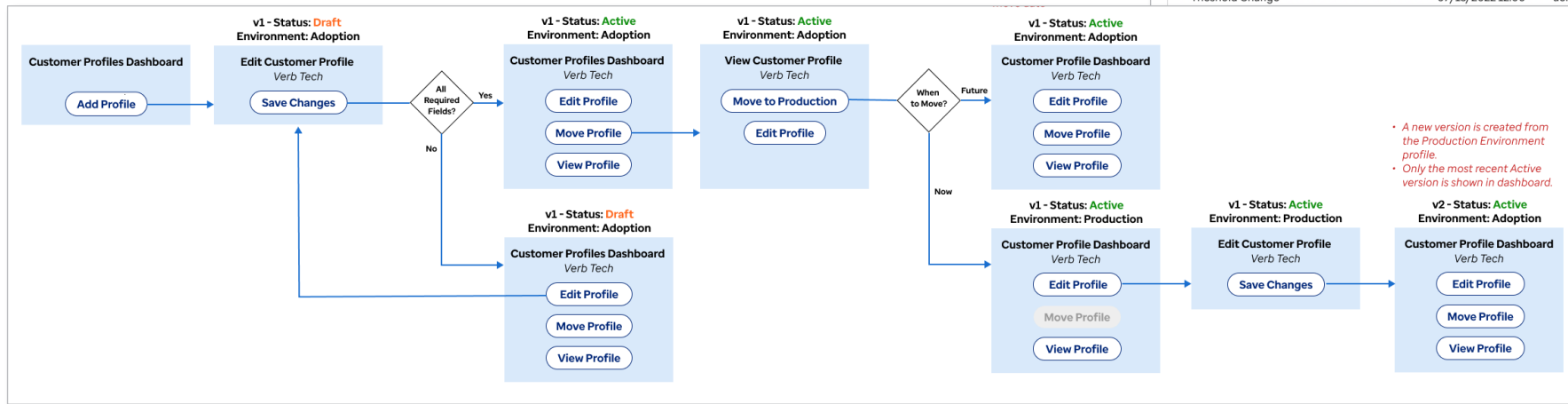
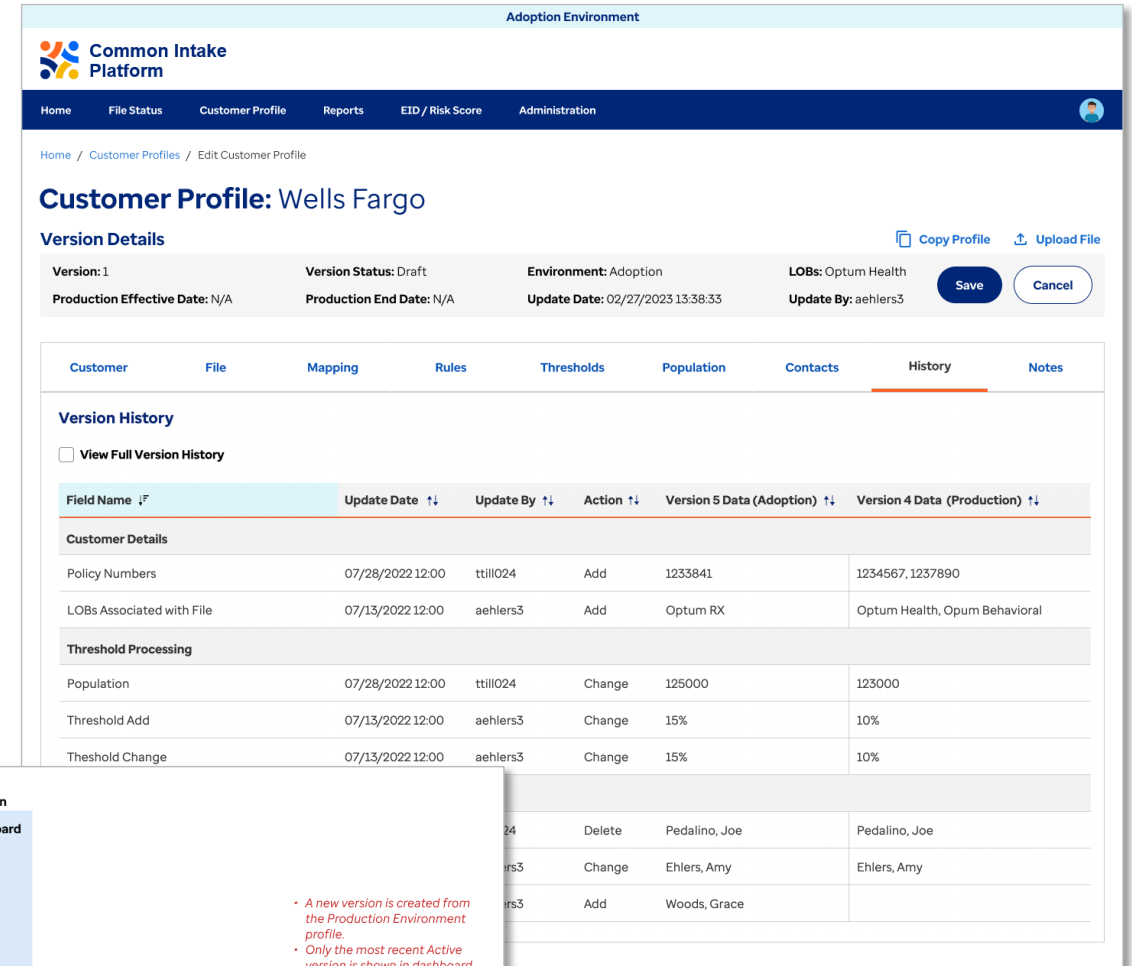


Customer Profile - Version History

Customer profiles manage how member data is processed. Member data is updated frequently, so changes must be tested in an adoption environment before going into production.

Challenge: During testing, BAs must compare the working profile changes to the approved profile and the entire version history to identify problematic patterns.

Solution: I worked with IT and stakeholders to determine when profile changes warrant a new version and the best way to organize the information.



- A new version is created from the Production Environment profile.
- Only the most recent Active version is shown in dashboard.

Customer Profile - Notes

Challenge: Multiple lines of businesses can make changes to a customer profile. BAs want to track who changed the profile and why without relying on an email or third-party applications.

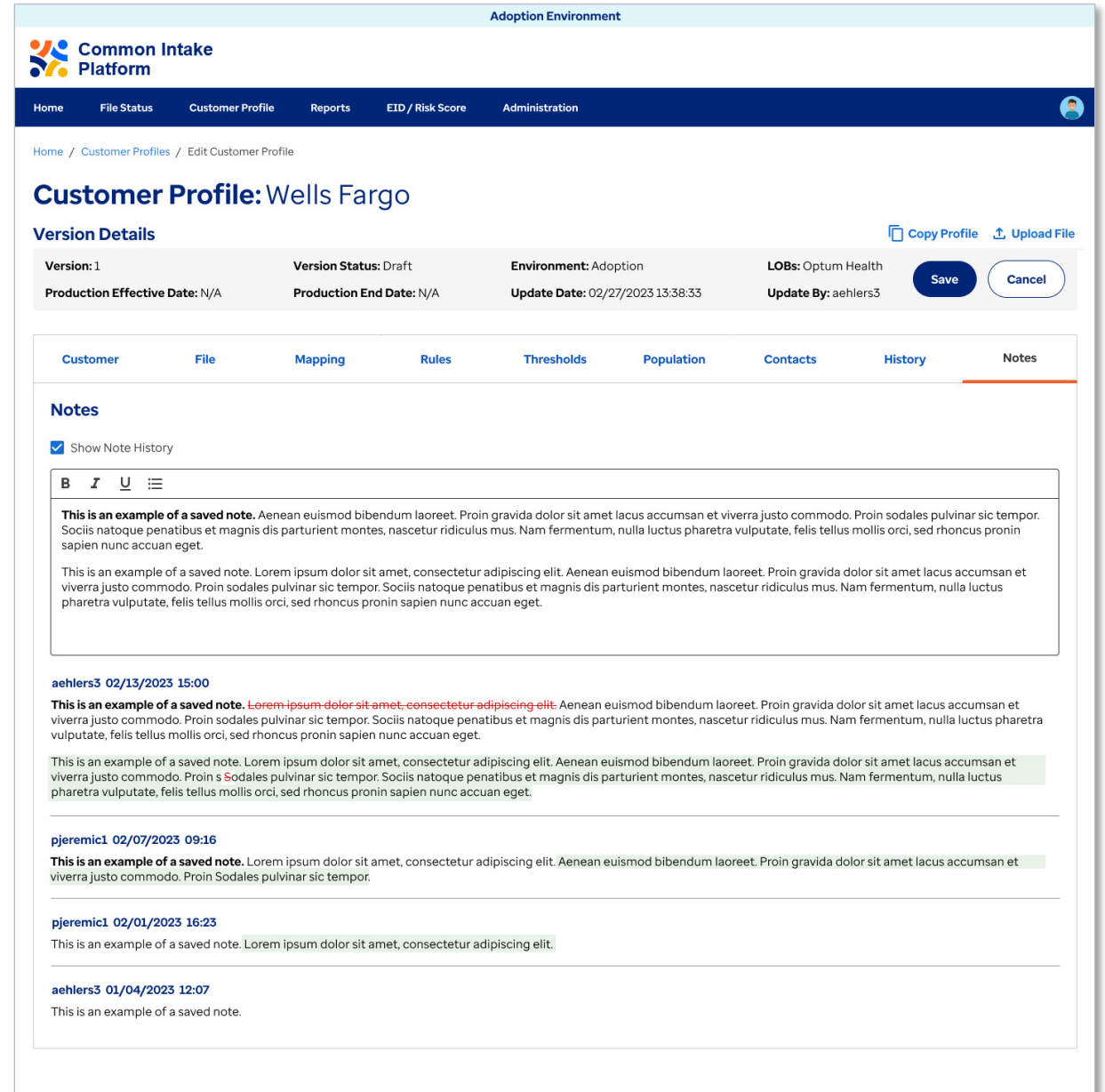
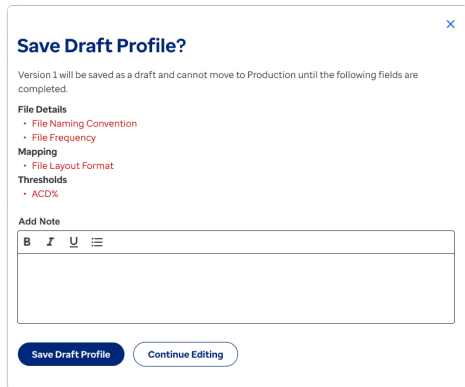
Solutions: All notes are organized from newest to oldest.

v1 - Creating or editing a note is done inline. Only the BA who created the note can edit or delete it.

v2 - Adding or editing a note is done in a modal. Notes can be archived and viewed later.

v3 (approved) - The edit field contains the newest note. Any changes to the note are reflected in the note history.

I also added a note feature when saving changes to a customer. Those notes will be in the History tab.



Members File - Processing Statistics

Challenge: Each file produces multiple reports on the type and status of member transactions and corrections needed. BAs need an overview of the information to get a general picture of the data processed and if further action is warranted.

Solution: I created a dashboard that gives an overview of the file data.

- An accordion of the All Transactions card was incorporated to minimize cognitive load to keep other data above the fold.
- Specific colors and styling were used to meet accessibility standards.
- Clicking links in the cards gives a filtered view of other reports.

Adoption Environment

Common Intake Platform

Home / File Status / Customer Profile / Reports / EID / Risk Score / Administration

Home / File Status / Processing Statistics

Reports Processing Statistics [Print](#) [Download](#)

Threshold Exceeded: Set ACD Threshold: 0 - Actual Threshold Count: 150 [Continue Processing](#) [Reject File](#) ✕

Wells Fargo File Details

File Status: Threshold Exceeded 03/09/2023, 09:59:03 **Identity Management Status:** Complete 04/07/2023 13:38:33

Profile ID: WELLFG **Customer Number:** 00034567

LOBs: E&I Key Accounts **File ID:** 20230309-1106247

File Name: IDEONF.CIP20230309080444.hipaa **Total Records:** 228,033

Members **Total: 228,023**

● Subscribers: 164,219
● Spouses: 52,459
● Dependents: 11,345

All Transactions **Total: 228,033**

▼ **Error Transaction Counts** **3,121 (1.37%)**
▲ **Successful Transaction Counts** **224,962 (98.65%)**

Type	Subscribers	Spouses	Dependents	Total
Add Transactions	12,345	12,345	12,345	121,479 (54.09%)
Change Transactions	12,345	12,345	12,345	175,005 (77.93%)
Term Transactions	12,345	12,345	12,345	55,681 (24.61%)

Errors and Warnings **Total: 252**

Correction By	Severity	Type	Count
Customer	4 - Priority	Cov on Source - Not on File	123
Cutsomer	4 - Priority	SSN Missing or Invalid	1
Eligibility Analyst	1 - Priority	Customer Number Not Matching	127
Eligibility Analyst	2 - ID Card Impact	Fam Member has Internal Error	1

Field Change Counts **Total: 310**

Field Name	Count
Member First Name	218
Member Middle Name	12
Member Gender	12
Member Marital Status	10