

# Preston Purnell

Senior Product Designer

GENERAL APPLICATION

# **I have 9 years of experience, including 3 years of dedicated PBM domain expertise**

I translate fragmented workflows and complex formulary and claims logic into intuitive, efficient, WCAG-compliant experiences that strengthen the PBM-customer relationship.

I'm a clear & effective communicator with natural curiosity, and a high touch collaborator with product, engineering, and business teams to build the best possible experiences.



## WHAT I'M LOOKING FOR

I'm based in Cincinnati, OH and looking for a senior role in a mature design practice



# Here are a few key skills I bring to the table



## Human Centered Design

I use **interviews**, **observation**, and **data** to glean insights about users to inform my design. I validate concepts with real users whenever possible. I'm highly familiar with common patterns, best practices and **WCAG accessibility** requirements.



## Cross-functional Leadership

Every person is a customer, and that includes business stakeholders. I pride myself on **clear communication** that helps people work more effectively with design, implement design recommendations, and give constructive feedback.



## Systems Thinking

I advocate for and contribute to **design systems**, continually identify opportunities for **collaboration** between overlapping applications, and help set the direction for integrating emerging technologies like **AI tools** into design practice.

# My Background and Experience



## GLOBALEZ

Early stage startup where I built a digital prototype for an innovative ESL training tool

2018



## Navitus Health Solutions

I joined as one of 3 founding members of the design arm on the CX/DX Team at Navitus, tasked with bringing consistency and user-centered design across their suite of internal and external applications.

2023

2017



## QuickMAR

As a B2B SaaS salesperson, I offered to redesign my employer’s onboarding flow & ended up reducing company-wide time to revenue by 6 weeks

2018



## Pando Development

Sole Designer - I defined & designed every new project the company took, from early stage consumer mobile apps to business tools for SMBs on web and mobile.

Now

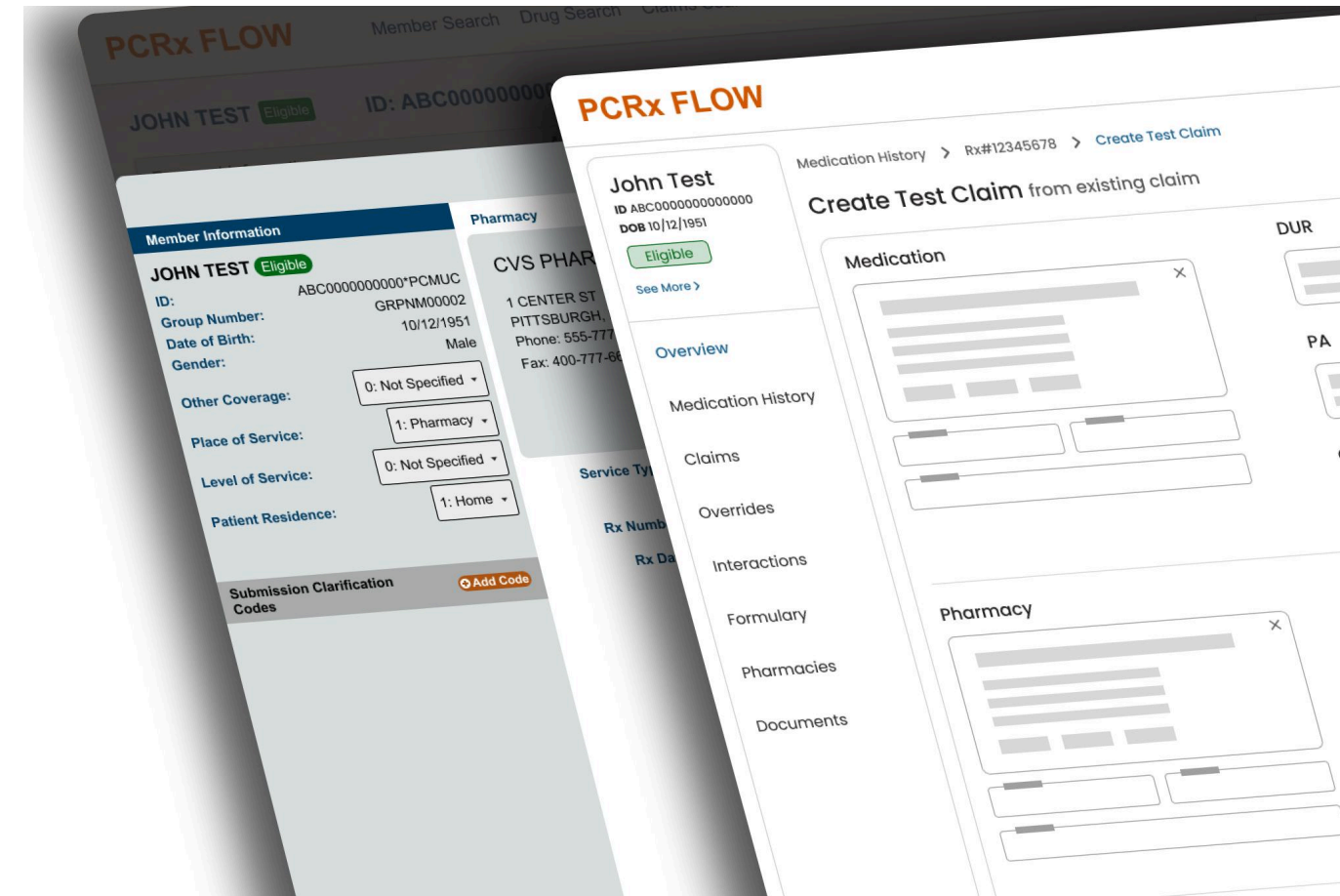
I want to bring my enterprise healthcare domain knowledge and product design experience to a new opportunity for impact

# Hand-Picked Case Studies



# Resurrecting PCRx Flow: Research, Rationale & Leadership Buy-In

# How aligning senior leadership around user insights took a neglected PBM tool from the enterprise back burner to a strategic priority



## Redesigning Test Claims: Adapt & Deliver

## How I worked cross-functionally to resolve Test Claims pain points in an end-to-end redesign of a Member Support application





# Resurrecting PCRx Flow: Research, Rationale & Leadership Buy-In

How I brought a core PBM application from the enterprise's back burner to the forefront through research and communication

## Responsibilities

User Research

Prototyping and Feedback

Gain Leadership Support for Full Redesign

## Timeline & Team

4 months, working with a Business Analyst

## Outcomes

Moved to top priority list for 2026 and forward,  
and received special funding

CX/DX Team integrated more fully into  
organization

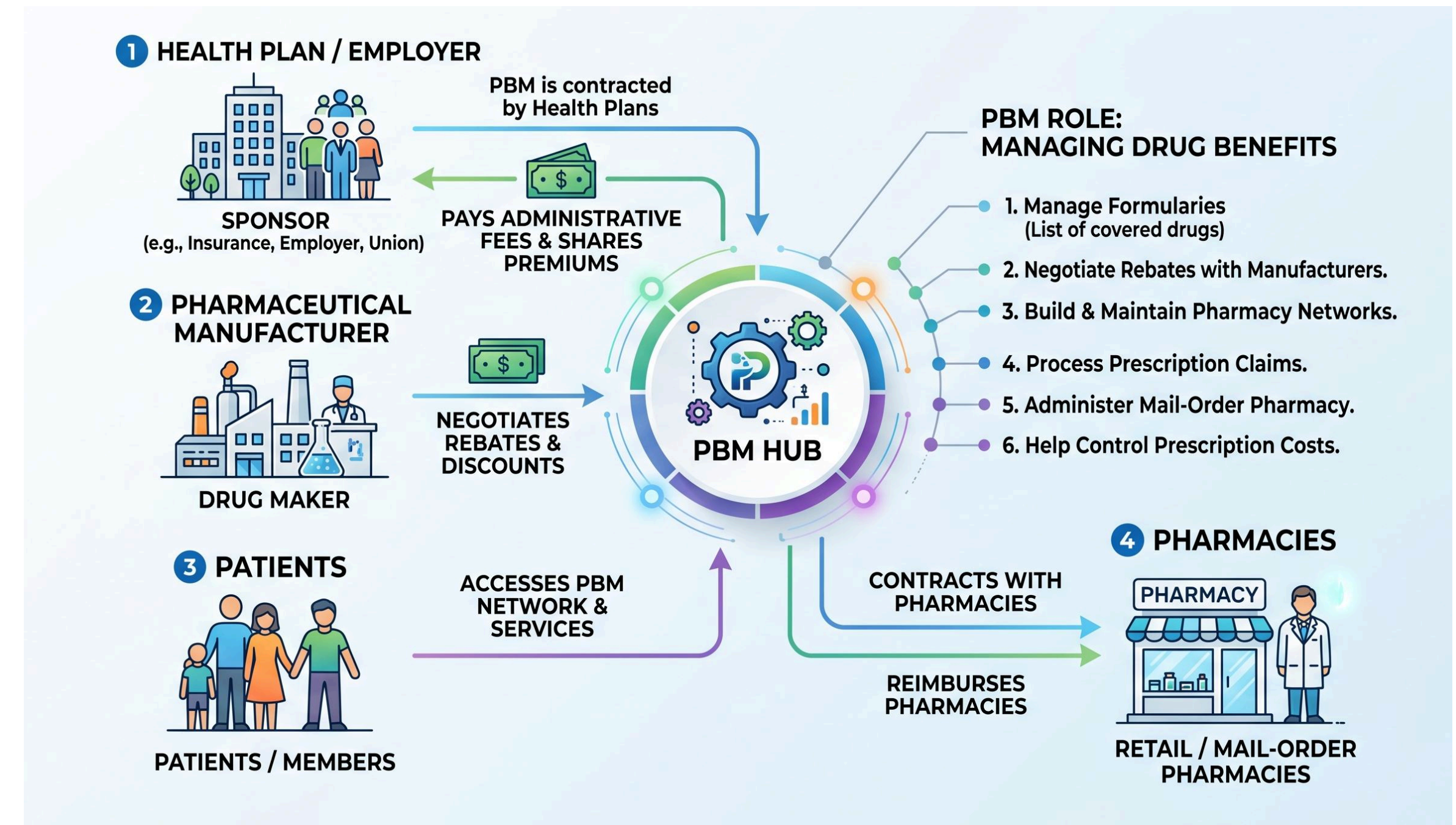
\*Mockups and screenshots in this project have been recreated from scratch and/or anonymized or abstracted to protect confidentiality



## Company Overview

# Pharmacy Benefit Manager, with custom built tools for setting up benefits, processing drug claims, and providing member & client support

Designers were hired to bring user-centered design and consistency across these homegrown apps

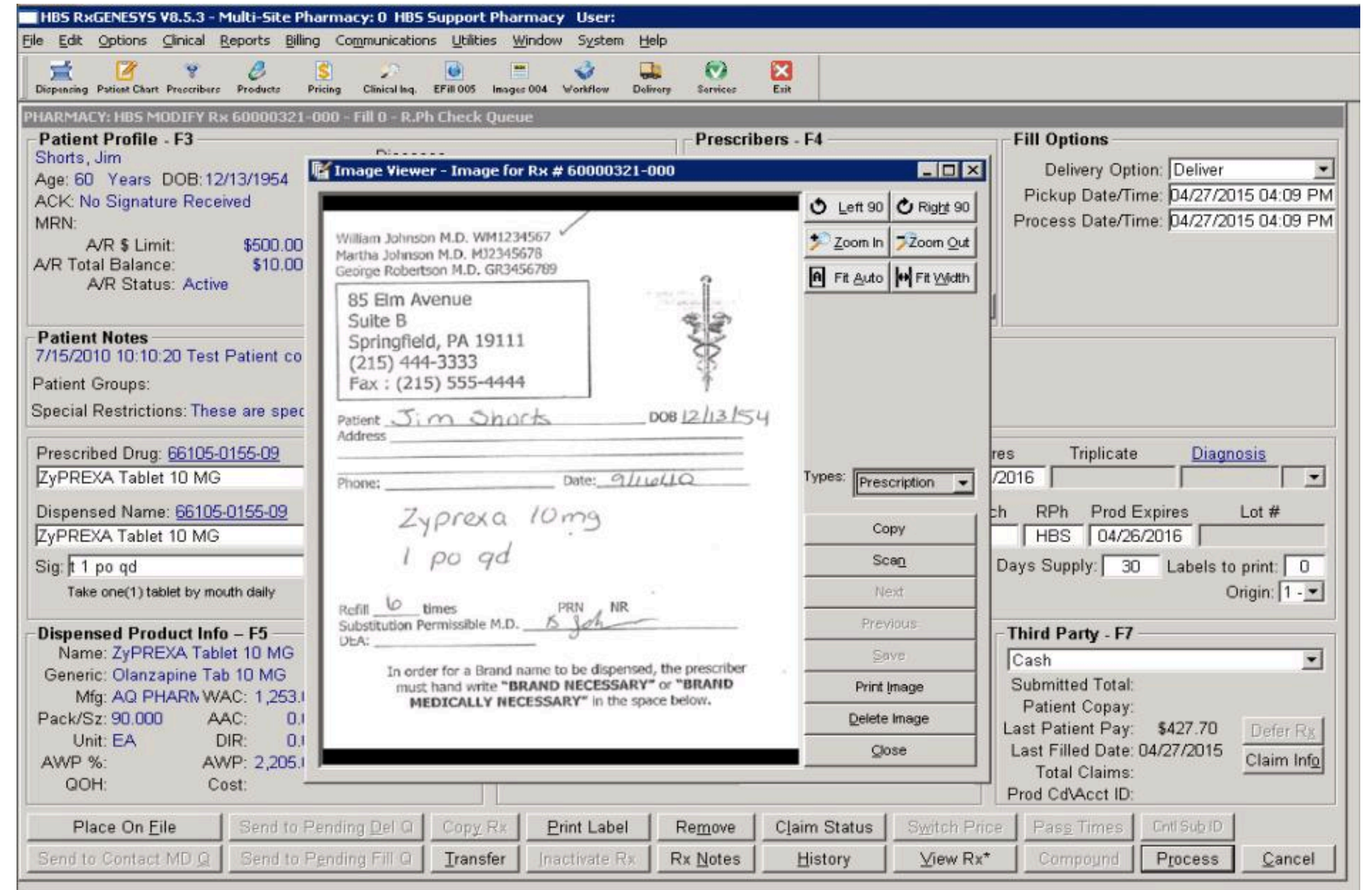




## Project Background

**PCRx is a 20 year old desktop application that runs EVERYTHING at this PBM**

Used internally for everything from benefit configuration to claims adjudication, running test claims, manual claims, and tracking communications with PBM members

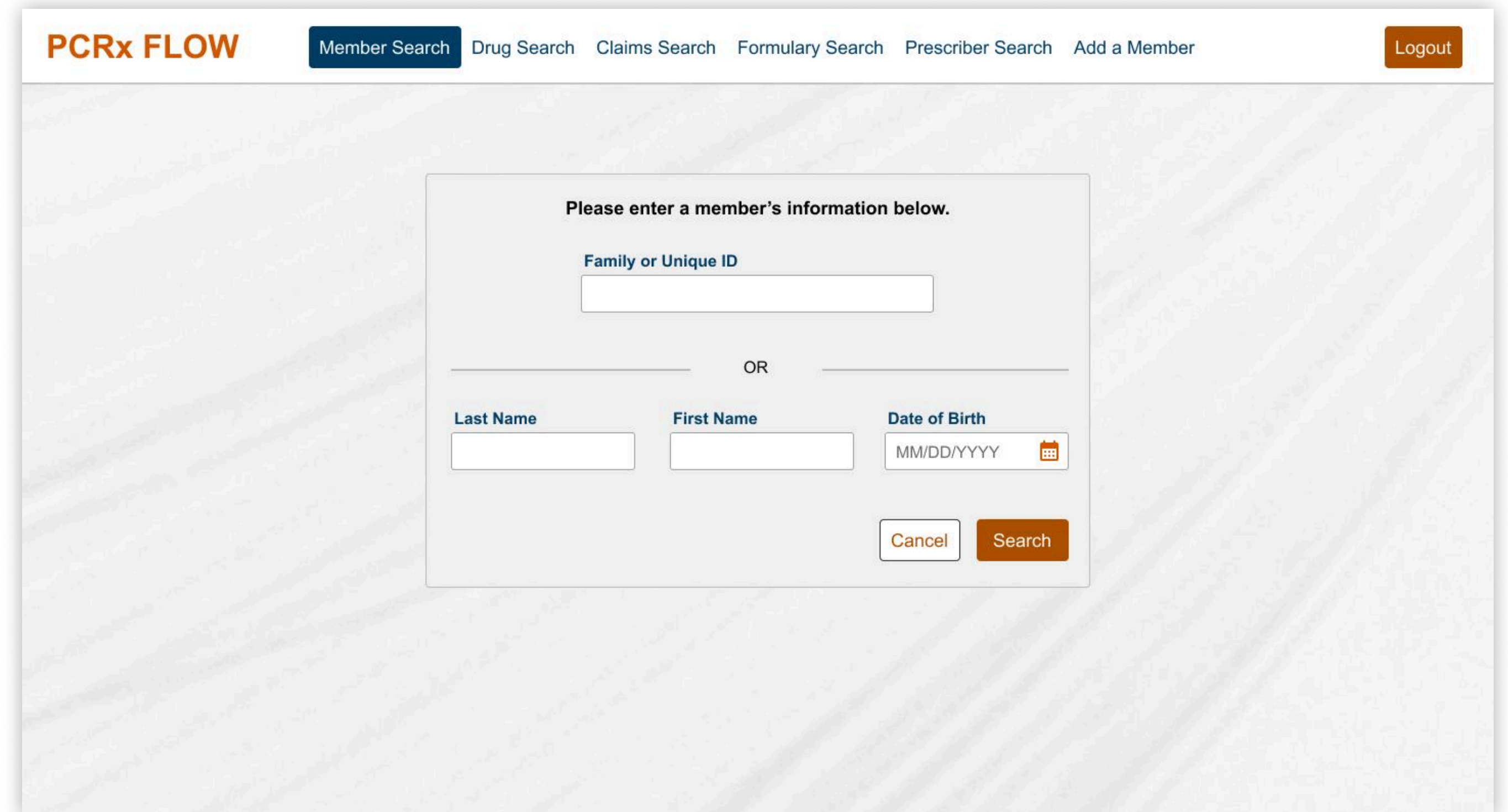


This isn't the real application, but it looks at least this busy and this dated

## Project Background

# PCRx Flow was a modernized version built to surface some of the PCRx data for clients

Built long before design was a practice at the enterprise, this ended up being a patchwork of reactive feature additions based on client requests, built with now aging UI components.



The image shows a web application interface for PCRx FLOW. The header includes the logo "PCRx FLOW" in orange and blue, followed by a navigation bar with links: "Member Search" (highlighted in a blue box), "Drug Search", "Claims Search", "Formulary Search", "Prescriber Search", and "Add a Member". A "Logout" button is in the top right corner. The main content area features a light gray background with a subtle pattern. A central white modal box contains the text "Please enter a member's information below." and a form with the following fields: "Family or Unique ID" (a single text input), "OR" (separated by a horizontal line), "Last Name" (text input), "First Name" (text input), and "Date of Birth" (a date picker showing "MM/DD/YYYY" with a calendar icon). At the bottom right of the modal are "Cancel" and "Search" buttons.

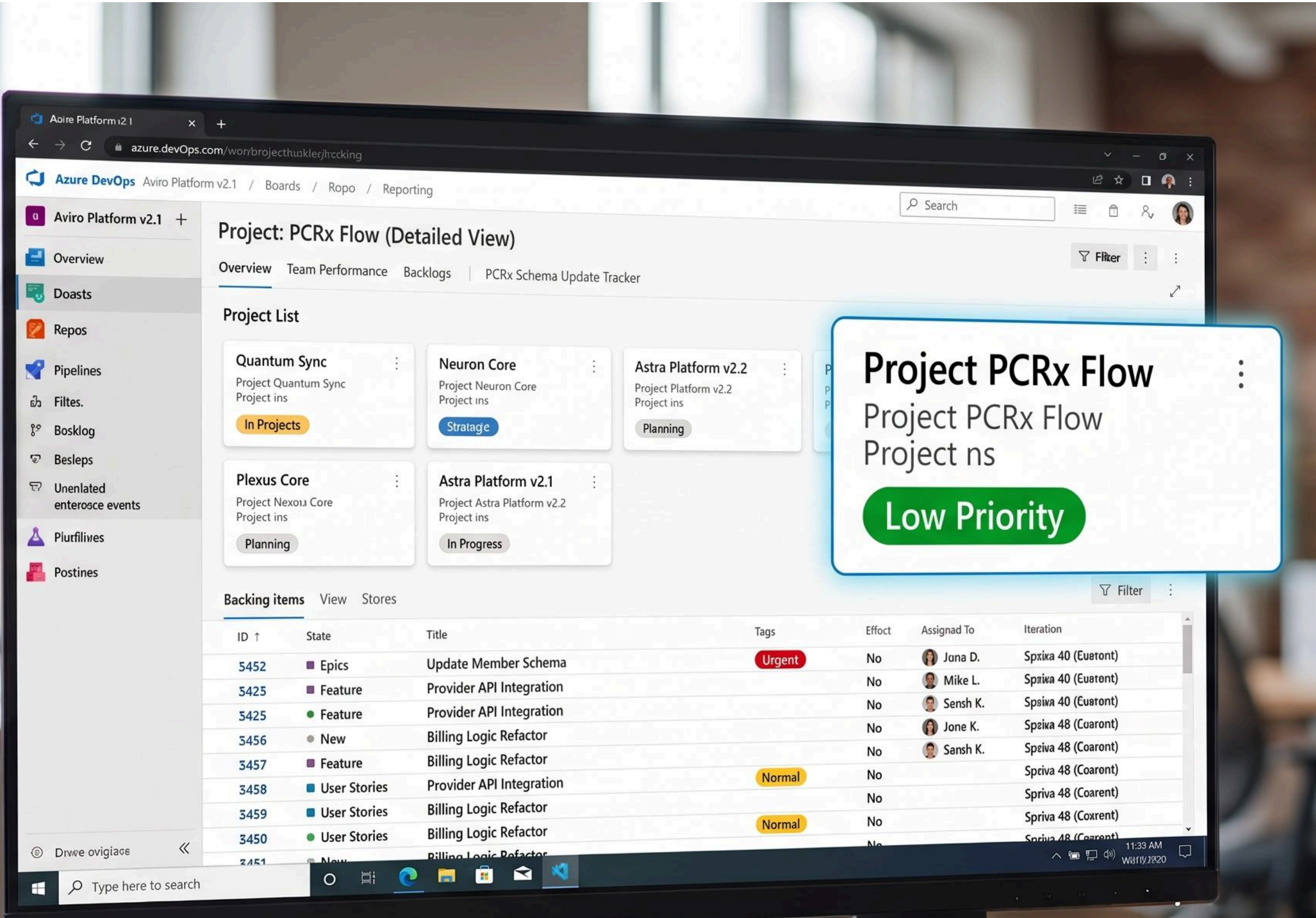
Anonymized recreation



# Project Background

As just one of 20+ applications at the enterprise, this wasn't the focus of much strategic attention or investment

But it was an available area for the Customer and Digital Experience team to have some influence, so it was assigned to me.



# PCRx Flow's Resurrection

Through my work, the perspective on this application would eventually totally flip. The enterprise would come to recognize the value in investing in a full redesign, and would end up **moving this project to their top priority list for strategic investment in 2026.**

**Let me show you how I got there...**



## Project Summary

**The CX/DX Team's strategic objective with this project was to develop this opportunity into shipped work demonstrating the value of design to the enterprise**

### **Research & Discovery**

User Interviews

### **UI/UX Analysis**

Heuristic Analysis

Design System

### **Prototype & Validate**

Demonstrate proposed changes

Get feedback/validation from users

### **Present for Buy-In**

Create Business Case

Present Recommendations to senior leadership

## Research & Discovery

# Who is the user?

Answers from associates at the enterprise gave little insight (“internal” or “external”)

My Business Analyst (Vanessa) arranged for me to do **10 user interviews**

- As close to a contextual inquiry as possible in a remote setting
- “Train me how to do your job, not how to use the application”
- I wanted to understand what they did inside and outside the app so that I could identify workarounds they’ve been doing for so long they don’t notice them anymore





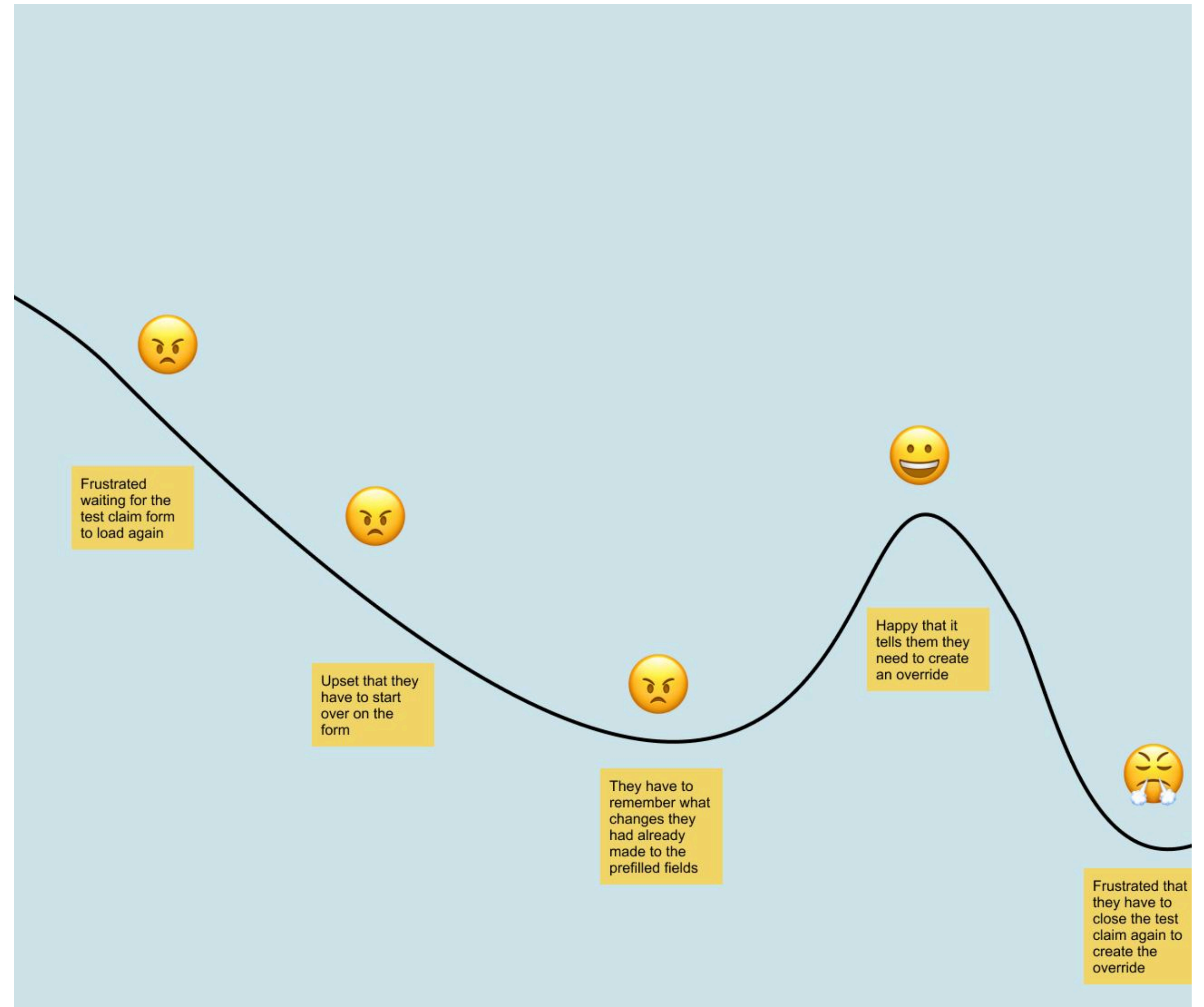
## Research & Discovery

# Identifying Themes

While I conducted interviews, the B.A. was creating a journey map

Some clear themes began to emerge around

- the Test Claims flow
- the Search experience
- Some Interactions designed by developers to improve performance



Recreation

# UX/UI Analysis

## Heuristics & Systems

I analyzed heuristics like

- User control, up-to-date patterns, recall vs recognition, consistency & standards, etc.

I thought in terms of our nascent design system

- Where will existing design system components work?
- If custom components are necessary, can I design them such that they can be added to our design library for use in other apps?

PCR<sub>x</sub> FLOW

Member SearchDrug SearchClaims SearchFormulary SearchPrescriber SearchAdd a MemberLogout

JOHN TESTEligibleID: ABC0000000000\*PCMUCDOB: 10-12-1951, 73 yearsGender: MMember Options

Test Claim

CancelSubmit

Member Information

JOHN TESTEligible

ID: ABC0000000000\*PCMUC

Group Number: GRPNM00002

Date of Birth: 10/12/1951

Gender: Male

Other Coverage: 0: Not Specified

Place of Service: 1: Pharmacy

Level of Service: 0: Not Specified

Patient Residence: 1: Home

Submission Clarification CodesAdd Code

Pharmacy

CVS PHARMACY #05011

1 CENTER ST  
PITTSBURGH, PA 16901  
Phone: 555-777-6666NPI: 0552485591  
Fax: 400-777-6667NCPDP: 6552144

Show DetailsEdit

Service Type: 1: Community/Retail Pharmacy Services

Rx Number: 0000000000

Rx Date: 01/27/2026

Medication

ATORVASTATIN

NDC: 0378395005  
GPI: 0002503030366530

Show DetailsEdit

Qty: 90

Days Supply: 90

Submitted Ingr. Cost: Default

Gross Amt. Due: Default

DUR InformationAdd DUR

Prior Auth InfoAdd PA

Prescriber

John Johnson

5 WATER ST  
PITTSBURGH, PA 16901  
Phone: 777-555-3333

Show DetailsEdit

DAW:

Qty Prescribed: 90.000

Diagnosis CodesAdd Code

Existing view for Test Claim creation



## Prototype & Validate

# Based on my research & analysis, I had 4 core recommendations to validate

If improved, these 4 things would deliver the most value to our users

I mocked up the proposed future state of each of these 4 core areas, and the B.A. and I met with users again to show the concepts

- feedback showed we were right on target



I used Figma to mock up the concepts, and Teams to meet with users remotely

Present for Buy-In

# Slide Deck & Business Case

The B.A. and I collaborated on writing a business case

- Improving this app, including its perception and adoption, would reduce calls to Navitus client support, and would eventually lead to eliminating client dependency on legacy PCRx, which was costly

I prepared a presentation to show the rationale behind my design recommendations. I presented first to the B.A. to make sure we were on the same page

- I wanted to be prepared to have solid reasoning for anyone with a strategic role that would influence this project moving forward

CX was really advocating for this and other design work with Senior Leadership behind the scenes (change management), priming things for us to make our case





**“I think we need to  
show this to Jenny”**

-B.A.'s response



**Present for Buy-In**

# **This is Jenny**

**CX/DX Director**

- Operations background
- Systems thinker
- Responds to logic, reason, and data
- Often has opinions (for better or worse) about design specifics
  - Willing to cede ground if you can show her grounded rationale





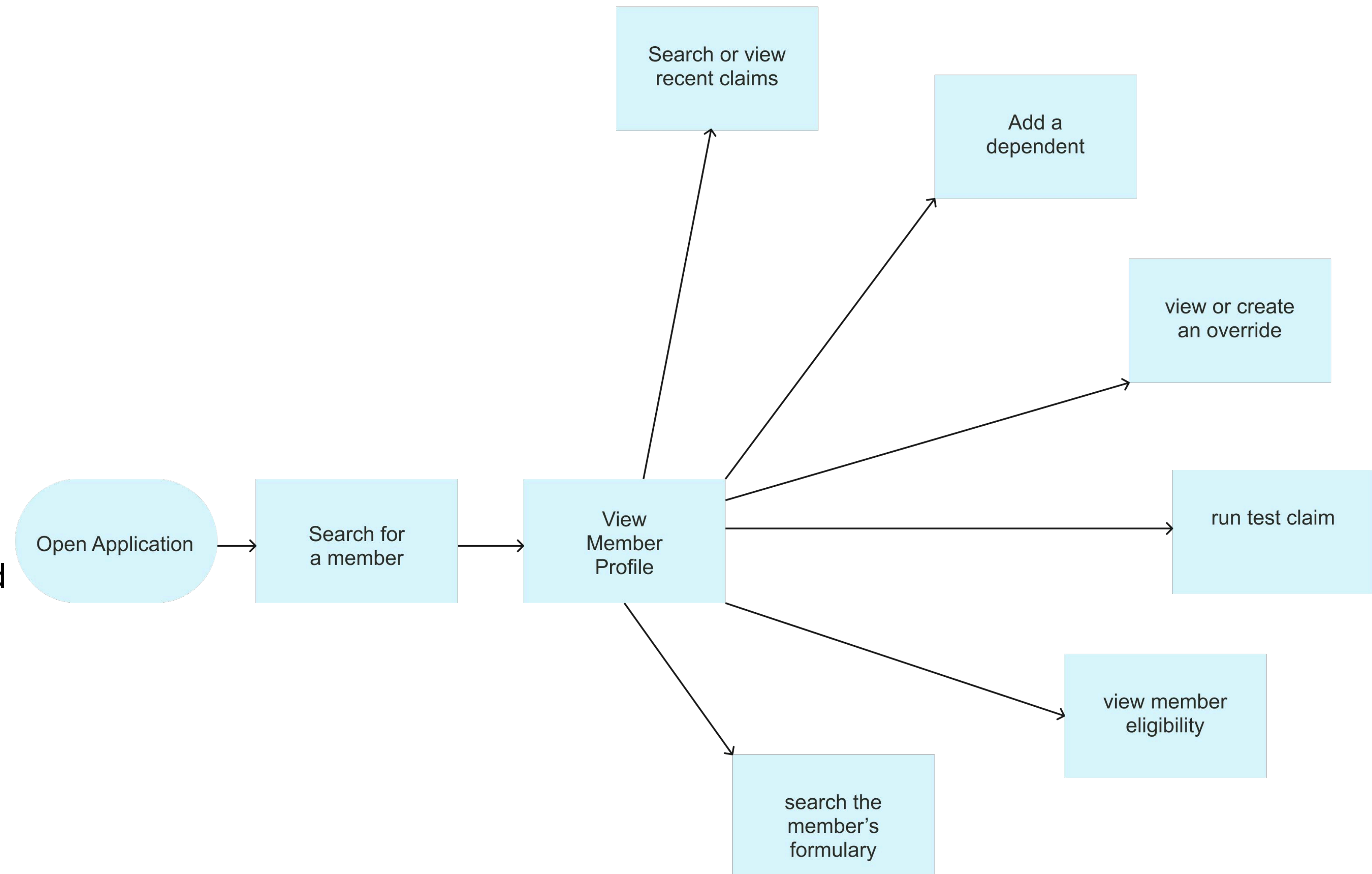
# **Here is the presentation I used to solidify Jenny's support**

\*The following presentation was recreated from scratch and mockups abstracted and anonymized for confidentiality

# What is at the core of this application?

## According to interviews

- Everything starts with a search
- Especially in a call center environment, most flows revolve around a member
  - Start by searching a member, and then begin a workflow from there (another search, or just drilling into specific set of information on the member profile)



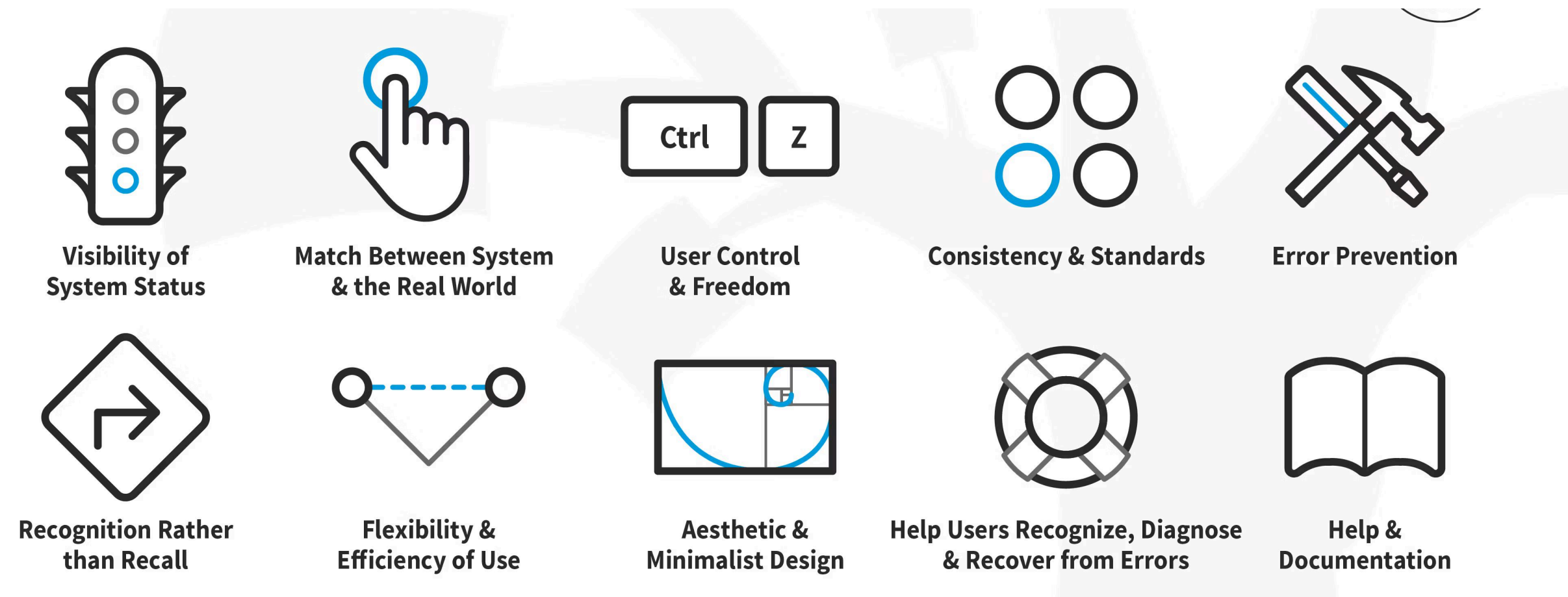


# Areas of focus



# Our Analysis

## Usability Assessment



## User Interviews

- 10 user interviews to look at real user behavior and pain points

# Search

Member Search

Drug Search

Claims Search

Formulary Search

Prescriber Search

Add a Member

Logout

Please enter a member's information below.

Family or Unique ID

OR

Last Name

JOHNSONHAM

First Name

LI

Date of Birth

MM/DD/YYYY

LINDA JOHNSONHAM

ID: D1003054204\*PCUHS

Eligible

AGE: 41 y.o.

DOB: 12/07/1984

LIN JOHNSONHAM

ID: D1003054204\*PCUHS

Eligible

AGE: 77 y.o.

DOB: 12/07/1947

LINDA JOHNSONHAM

ID: D1003054204\*PCUHS

Eligible

AGE: 41 y.o.

DOB: 12/07/1984

Search Criteria

Member

Family ID

Unique ID

Association

Pharmacy

Medication

Max Results:

25

Transaction Range From:

10/12/2024

12:34 PM

Transaction Range To:

11/12/2024

12:34 PM

Transaction Source:

Adjustment System x

Copy Assistance Coupon x

Initial Pricing Claim x

Transaction Status:

Authorization Num:

Include Test Claims

Reset

Search

Search Results

PCR<sup>x</sup> FLOW

Member Search

Drug Search

Claims Search

Formulary Search

Prescriber Search

Add a Member

Logout

Drug Search

Cancel

Drug Name:

OZEMPIC

NDC:

GPI:

Form:

Solution Pen-injector

Strength:

2.0 MG/3ML

Show Excluded Drugs

|         | Drug Name           | NDC         | GPI            | Brand/Generic | Rx/OTC | Manufacturer | MONEY                     |
|---------|---------------------|-------------|----------------|---------------|--------|--------------|---------------------------|
| Details | OZEMPIC INJ 2MG/3ML | 00169418113 | 2717007000D221 | Brand         | Rx     | NOVO NORDISK | N - brand with no generic |

## Information Architecture

- Each type of search has a dedicated nav bar menu item. Some are duplicated within the action dropdown on the member profile
- Spreads out similar functionality across seemingly disparate sections of the application, instead of grouping it together.

## Consistency

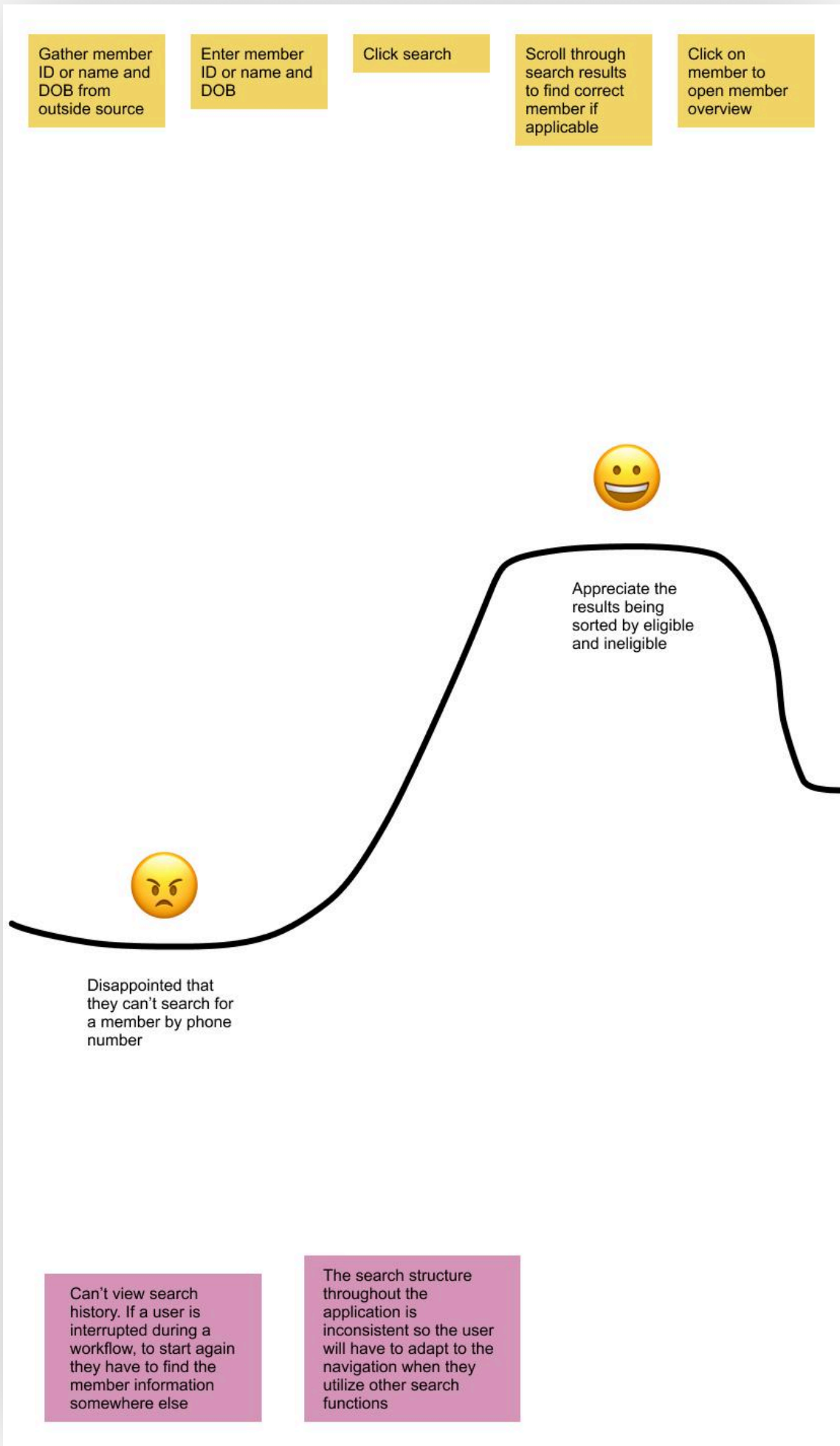
- Search results display differently with each type of search
- Search forms use different patterns with each type of search: accordion vs horizontal form with required and optional fields vs vertical form
- Some searches complete on input and others on click
- Some search pages are dedicated while others are large modals

## User Feedback

- No search history means I have to take notes externally or memorize things

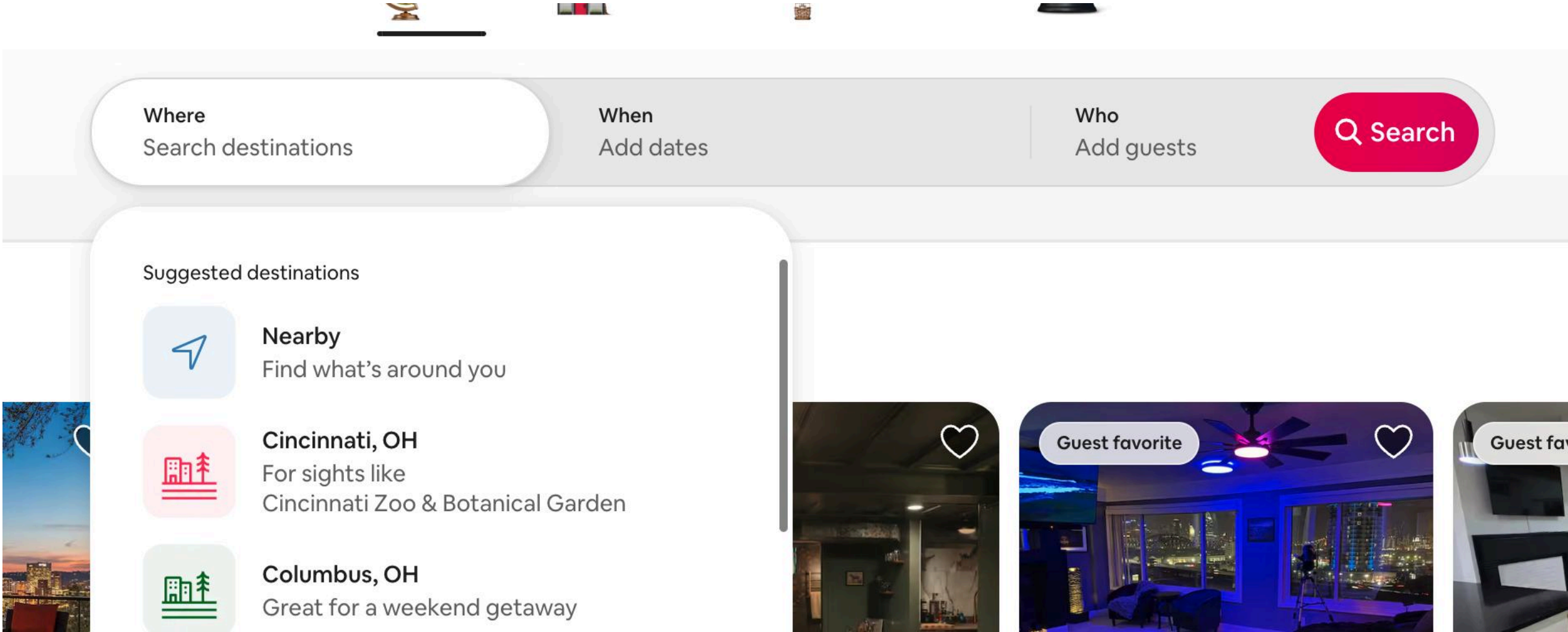
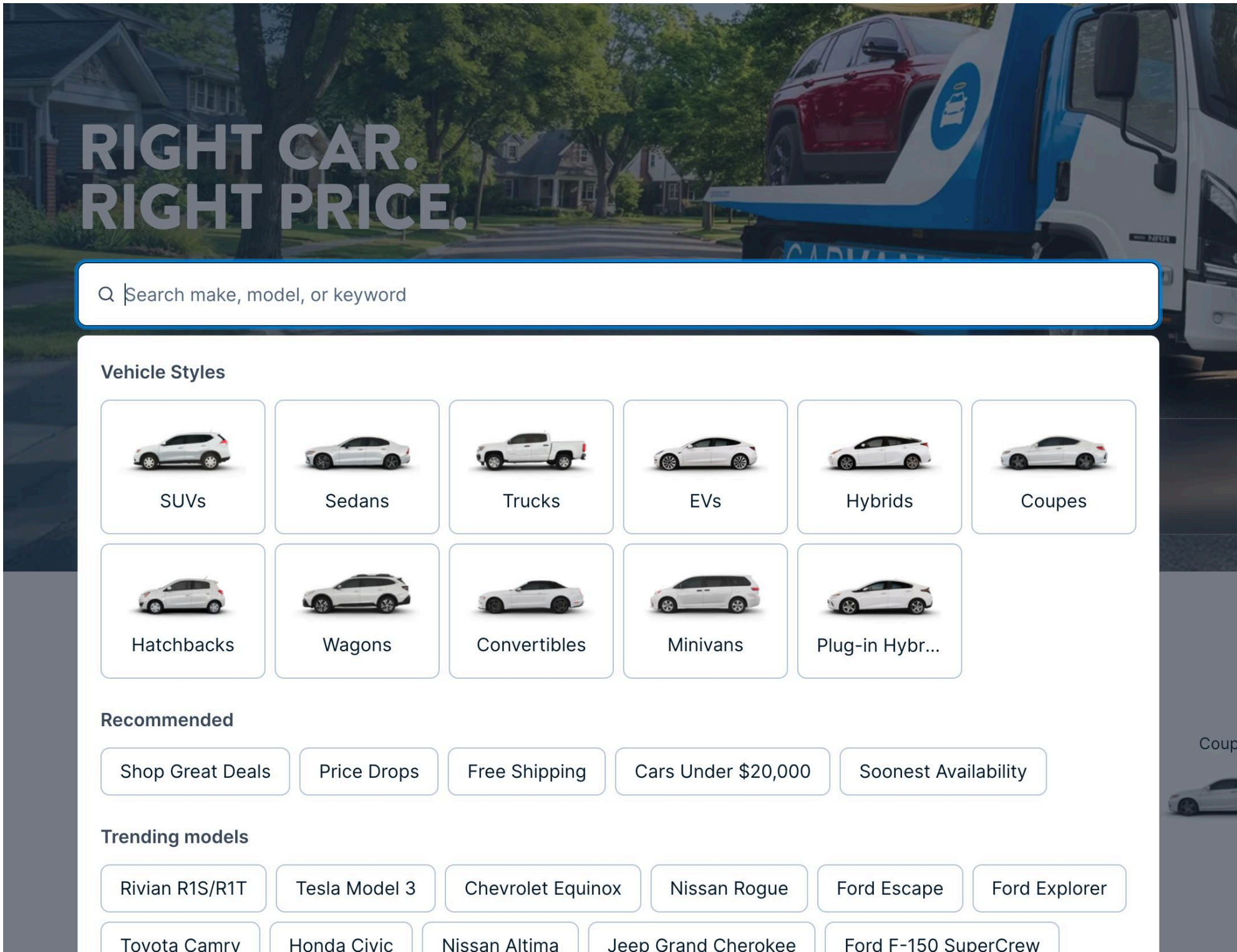


# Journey Map: Search



# Search future state

- Take inspiration from apps who live or die on their search AND have complex/multi-field search bars





# Search future state

The screenshot displays the 'PCRx FLOW' application interface. At the top left is the logo 'PCRx FLOW'. At the top right are links for 'Search', 'Add a Member', and a user profile icon. The main search area is titled 'Search' and features tabs for 'Member' (selected), 'Drug', 'Formulary', 'Claims', and 'Prescriber'. Below the tabs is a search form with fields for 'Unique or Family ID', 'First Name', 'Last Name', and 'Date of Birth' (with a calendar icon), followed by a 'Search' button. Below the form is a 'Search Results' table with columns: ID Number, Eligibility, Last Name, First Name, Date of Birth, and Phone Number. The table contains two rows of results. To the right of the search form is a 'Recent Searches' panel listing previous searches with names, roles, and timestamps.

| ID Number    | Eligibility | Last Name | First Name | Date of Birth | Phone Number   |
|--------------|-------------|-----------|------------|---------------|----------------|
| 001292484847 | Eligible    | Johnson   | Linda      | 10/12/1900    | (999) 555-5555 |
| 001292484847 | Eligible    | Johnson   | Lindy      | 10/12/1900    |                |

**Recent Searches**

|                               |         |
|-------------------------------|---------|
| Linda Johnson<br>MEMBER       | 9:01 AM |
| Bill Fry<br>MEMBER            | 8:49 AM |
| Willie Williams<br>PRESCRIBER | 8:33 AM |
| Dorothy Wanlass<br>MEMBER     | 8:29 AM |
| Wendyll Holmes<br>MEMBER      | 8:14 AM |
| Joe Johnson<br>MEMBER         | 8:01 AM |

## Information Architecture

- All search functionality is grouped together in a single place, reducing complexity and setting clear expectations for the user

## Consistency

- Search results display in the same place and the same way for every type of search
- Interaction with the search form is consistent across all types of searches. The user doesn't have to learn a new pattern with each type of search they start using.

## Usability

- Including recent searches panel reduces cognitive load and saves time

# Member Profile

PCR<sup>x</sup> FLOW

Member SearchDrug SearchClaims SearchFormulary SearchPrescriber SearchAdd a Member

Logout

JOHN TESTEligible

ID: ABC0000000000\*PCMUC

DOB: 10-12-1951, 73 years

Gender: M

Member Options

Personal Information

Address:

11111 21ST AVE SE  
BOTHELL, WA 980126429

Home Phone:

Language Preference:

Age:

73 years

Eligibility Information

Carrier

GENERIC CARRIER PLAN NAME  
PCMUC

Group

PCMU - BEPP (Board of Excellent  
Public Protest)  
ABCD0000000000000000

Subgroup

0000

Account

PCMU - BEPP (Board of Excellent  
Public Protest)  
00000000

Family Information

| Name      | Age     | ID                   |
|-----------|---------|----------------------|
| JOHN TEST | 73 y.o. | ABC0000000000*PCMUC  |
| JANE TEST | 73 y.o. | ABC00000000001*PCMUC |

Add Dependent

Recent Interactions

| Date       | Drug             | Reason          | Episode Status |
|------------|------------------|-----------------|----------------|
| 01/01/2024 | MORPHINE SULFATE | Drug Question   | Resolved       |
| 12/31/2023 | MORPHINE SULFATE | Processing Info | Resolved       |
| 12/31/2023 | MORPHINE SULFATE | Processing Info | Resolved       |
| 12/31/2023 | MORPHINE SULFATE | Processing Info | Resolved       |
| 12/31/2023 | MORPHINE SULFATE | Processing Info | Resolved       |

Overrides

| Date | Drug | Reason | Episode Status |
|------|------|--------|----------------|
|      |      |        |                |
|      |      |        |                |
|      |      |        |                |
|      |      |        |                |
|      |      |        |                |

## Scanability

- Large cards, on top of cards, on top of cards, all with dramatic drop shadows and bold header backgrounds, keep the focus on the UI and not the information
- Poorly organized content and oversized text uses a lot of space and requires a lot of scrolling to be able to scan visually
- Background image adds to clutter and distracts from the information

## Information Architecture

- Tasks that exist within the context of the member profile are presented in a counterintuitive pattern (dropdown that feels like a dashboard filter)
- Key member information doesn't always persist during task flows

## Consistency

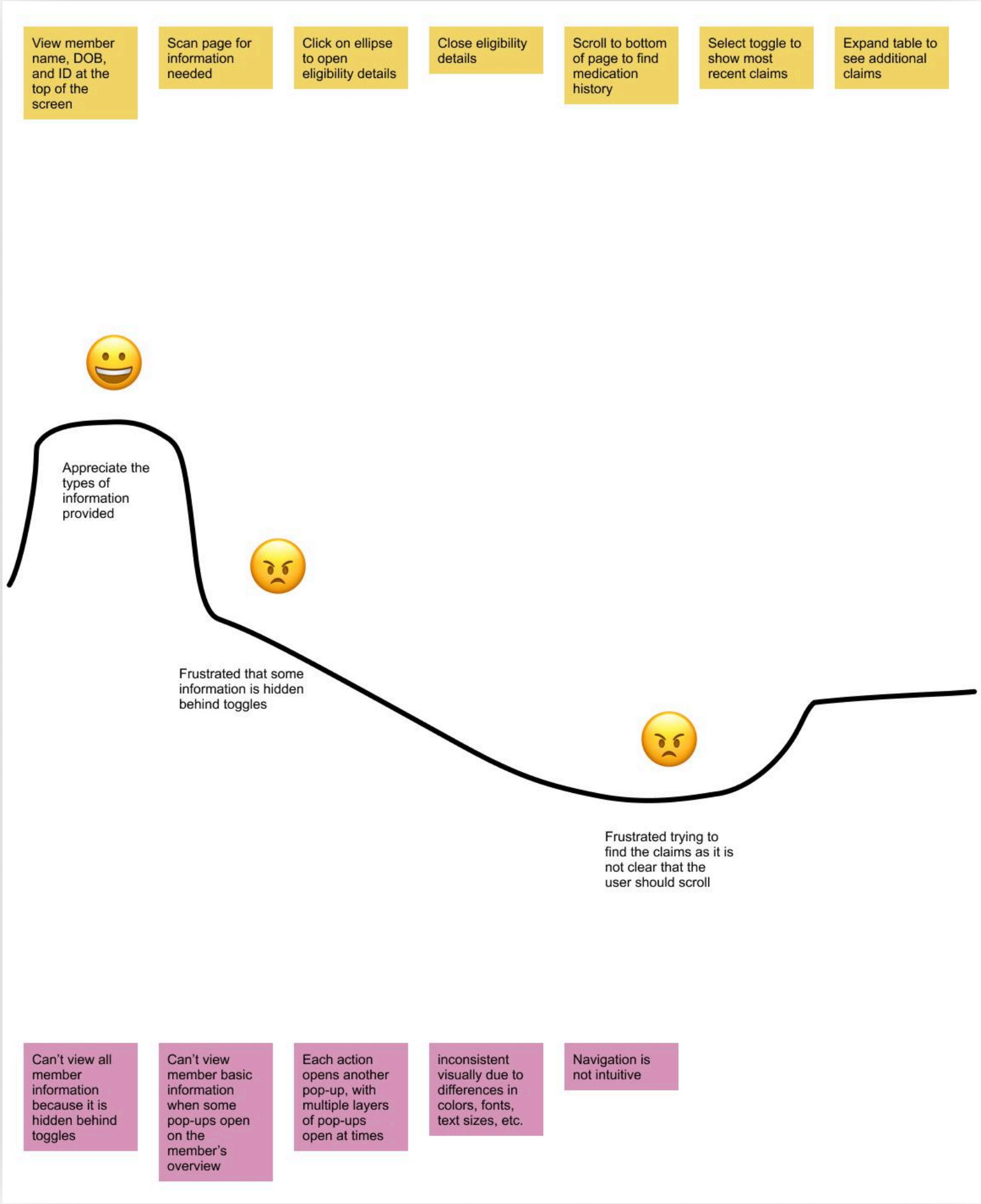
- Editing records is inconsistent: i.e. for Eligibility I click an ellipsis and then click "Eligibility Maintenance," but for Personal Info I click the expand arrows and then click "Edit"

## Brand

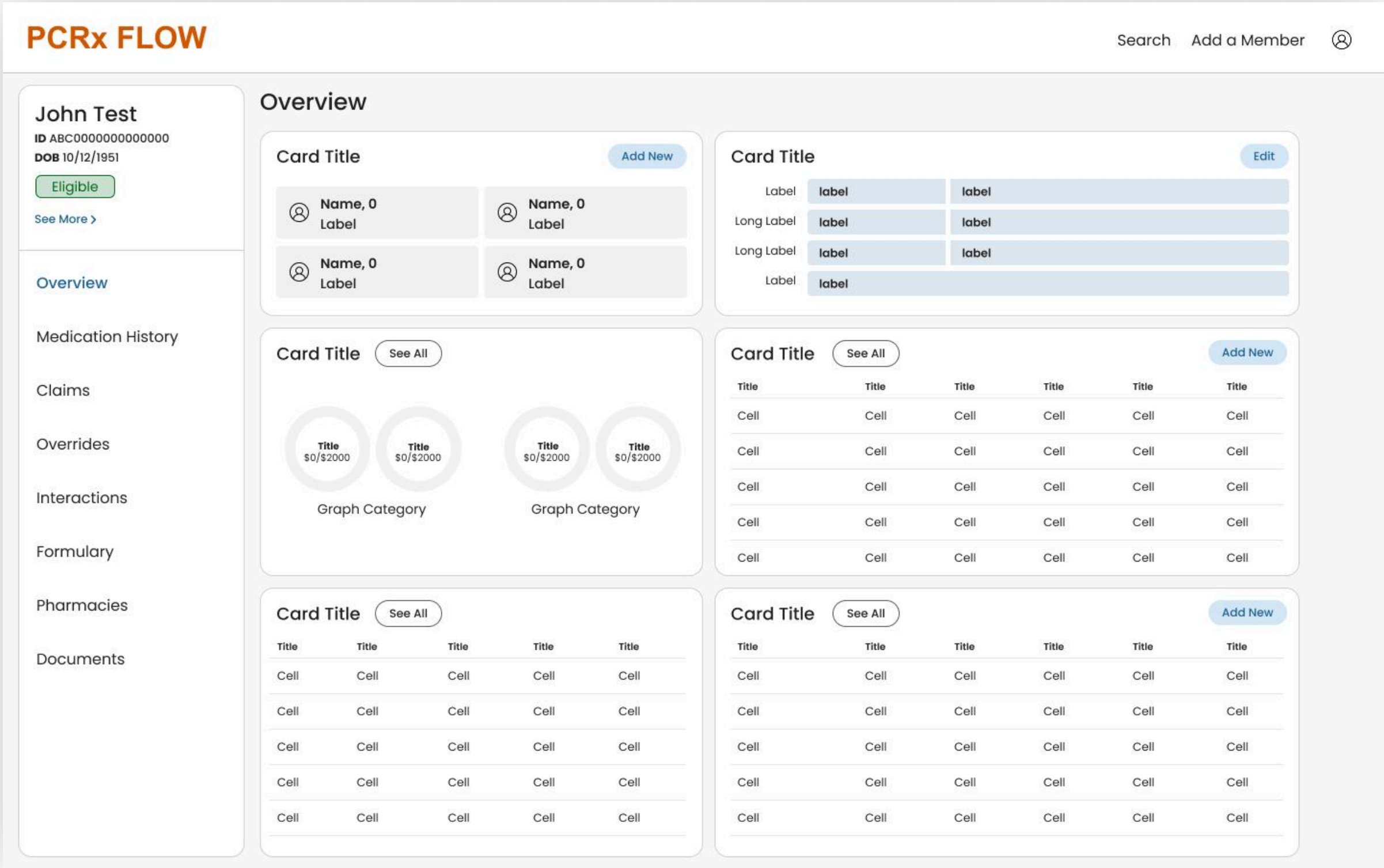
- Large fonts and components make the styling feel like a toy instead of a professional tool



# Journey Map: Member Profile & Navigation



# Member Profile future state



## Scanability

- Background, cards, font sizes and styles, and data display are consistent with brand standards, and reduced complexity to let the information stand out instead of just the visual elements

## Information Architecture

- All task flows that are associated with a member profile are included in a member profile-specific navigation menu
- A Member Information panel at the left persists across all flows within the member profile, to reduce cognitive load on the user

## Consistency

- Use of a single pattern for each interaction with a section of the profile: i.e. an “Add” or “Edit” button to manipulate or add to the records on the card



# Test Claims

JOHN TEST Eligible

ID: ABC0000000000\*PCMUC

DOB: 10-12-1951, 73 years

Gender: M

Member Options

Test Claim

Cancel

Submit

Member Information

JOHN TEST Eligible

ID: ABC0000000000\*PCMUC

Group Number: GRPNM00002

Date of Birth: 10/12/1951

Gender: Male

Other Coverage: 0: Not Specified

Place of Service: 1: Pharmacy

Level of Service: 0: Not Specified

Patient Residence: 1: Home

Submission Clarification Codes

Add Code

Pharmacy

CVS PHARMACY #05011

1 CENTER ST

PITTSBURGH, PA 16901

Phone: 555-777-6666

Fax: 400-777-6667

NPI: 0552485591

NCPDP: 6552144

Show Details

Edit

Service Type: 1: Community/Retail Pharmacy Services

Rx Number: 0000000000

Rx Date: 01/27/2026

Medication

ATORVASTATIN

NDC: 0378395005

GPI: 0002503030366530

Show Details

Edit

Qty: 90

Days Supply: 90

Submitted Ingr. Cost: Default

Gross Amt. Due: Default

DUR Information

Add DUR

Prescriber

John Johnson

5 WATER ST

PITTSBURGH, PA 16901

Phone: 777-555-3333

Show Details

Edit

DAW:

Qty Prescribed: 90.000

Diagnosis Codes

Add Code

PCR<sub>x</sub> FLOW

Member Search

Drug Search

Claims Search

Formulary Search

Prescriber Search

Add a Member

Logout

JOHN TEST Eligible

ID: ABC0000000000\*PCMUC

DOB: 10-12-1951, 73 years

Gender: M

Member Options

Test Claim

Cancel

Submit



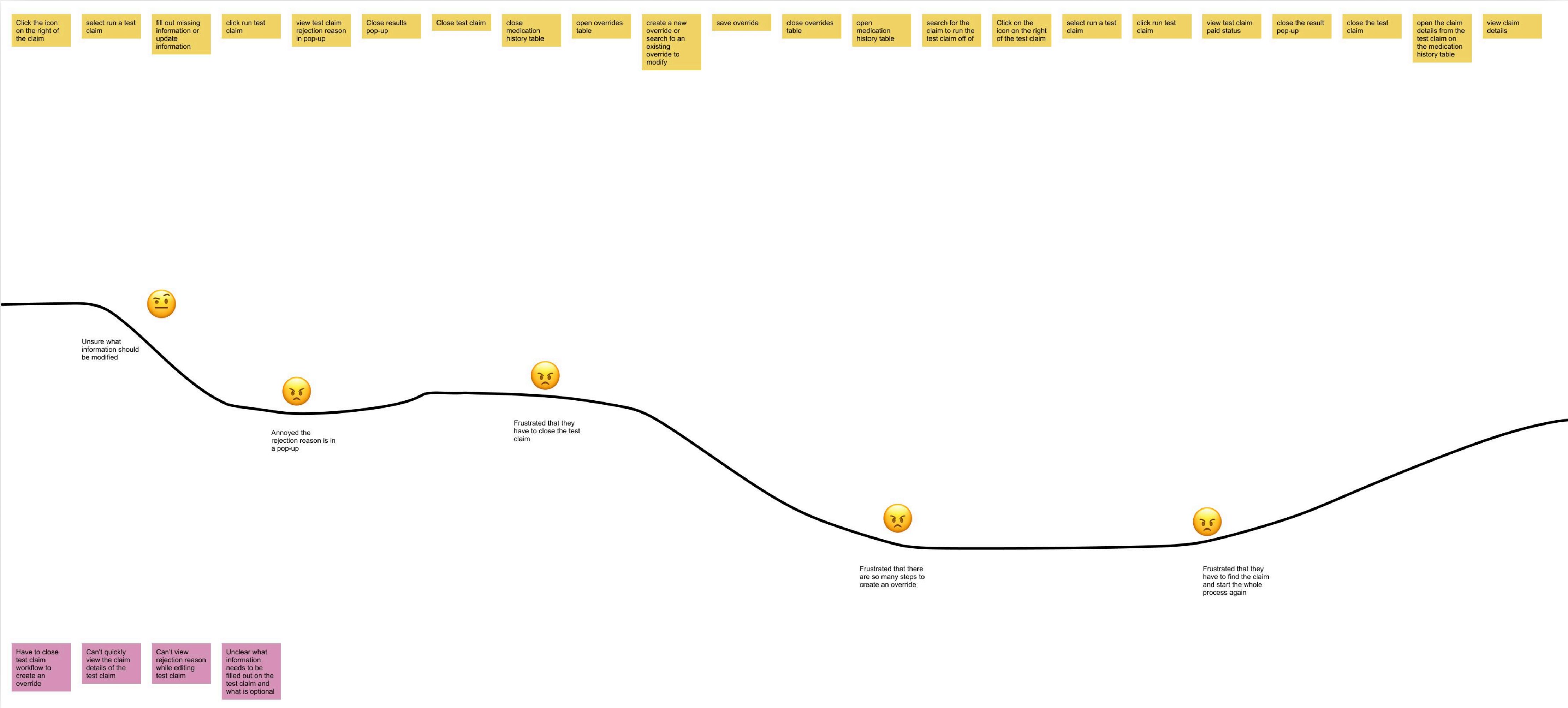
## Usability

- I have to close my test claim to go look at the original claim response, and then find and reload my test claim
- Rejection decision and additional message are not grouped together
- Screen is somewhat organized, but feels like it has had multiple bandaids additions
- I have to close my test claim to create an override, and then find and reload my test claim

## User Feedback

- Want to easily see previous claim response
- Have to leave flow to create override

# Journey Map: Test Claims





# Test Claims future state

- Supporting task flows are accessible from inside the Test Claim flow

PCRx FLOW

Search Add a Member

John Test

ID ABC0000000000000000

DOB 10/12/1951

Eligible

See More

Overview

Medication History

Claims

Overrides

Interactions

Formulary

Pharmacies

Documents

Medication History > Rx#12345678 > Create Test Claim

Create Test Claim from existing claim

Medication

DUR

PA

Overrides

Pharmacy

Prescriber

Test Claim Response

Original Claim Response

Rejected

10: Refill Too Soon

Additional Message

Refill Too Soon override required. DUR reject on NDC — PA denied at PBM level, need a DAW-1 override with valid ICD-10 dx to adjudicate the claim through the formulary exception process.

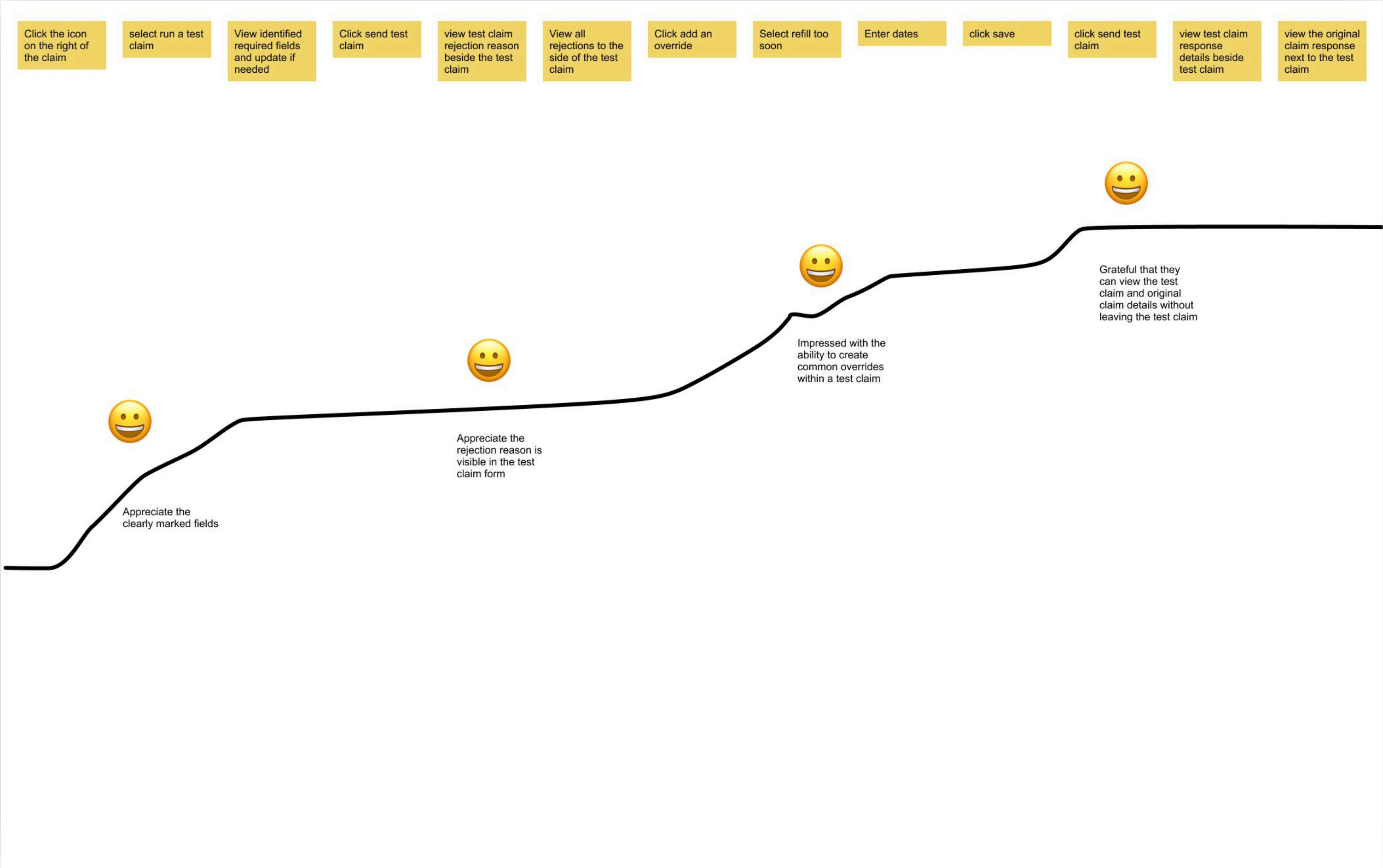
Override creation accessible from the Test Claim form

Original claim response is visible at anytime throughout the Test Claim creation flow

Rejection decision, reason, and message all display together next to the test claim form

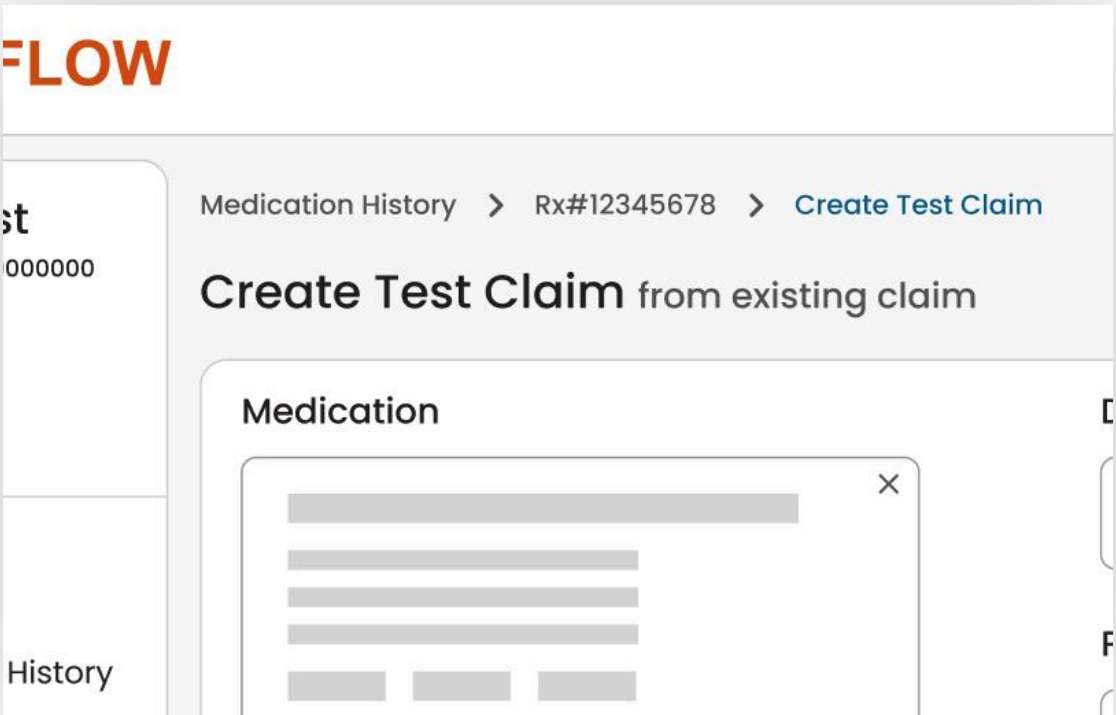
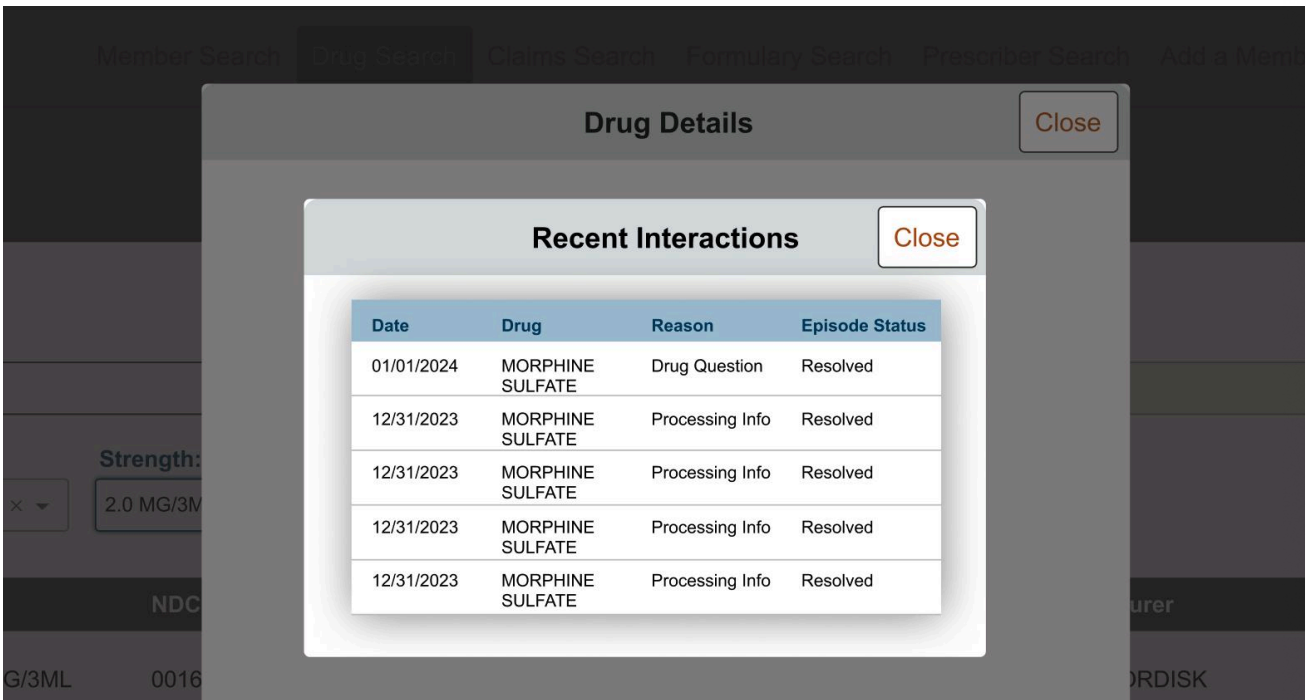
This presentation has been recreated from scratch and the product anonymized

# Journey Map: Test Claims future state





# Additional Recommendations



| Recent Interactions |                  |                 |                |
|---------------------|------------------|-----------------|----------------|
| Date                | Drug             | Reason          | Episode Status |
| 01/01/2024          | MORPHINE SULFATE | Drug Question   | Resolved       |
| 12/31/2023          | MORPHINE SULFATE | Processing Info | Resolved       |
| 12/31/2023          | MORPHINE SULFATE | Processing Info | Resolved       |

| Overrides                           |                      |
|-------------------------------------|----------------------|
| <input type="text" value="Search"/> |                      |
| MPA Number                          | Medication           |
| 000000000000000000000000            | LISDEXAMFETAMINE DIM |
| 000000000000000000000000            | VYVANSE              |

|                                                 |                                                 |
|-------------------------------------------------|-------------------------------------------------|
| <b>Family ID</b>                                | <b>Unique ID</b>                                |
| <input type="text" value="ABC000000112*PCMUC"/> | <input type="text" value="ABC000000117*PCMUC"/> |
| <b>Group Number</b>                             | <b>Carrier</b>                                  |
| <input type="text" value="123456ABC900000001"/> | <input type="text" value="NABP - Healthy"/>     |

|                     |                    |
|---------------------|--------------------|
| <b>Family ID</b>    | <b>Unique ID</b>   |
| ABC000000112*PCMUC  | ABC000000117*PCMUC |
| <b>Group Number</b> | <b>Carrier</b>     |
| 123456ABC900000001  | NABP - Healthy     |

## Dedicated Pages

- PCRx Flow handles most navigation through modals today
- Dedicated pages with breadcrumbs will allow for better way-finding

## Tables

- Tables in Flow suffer from the same styling issues as the Member Profile (distracting, bold styling)
- Minimalist, clean design will allow the data to stand out more than the design elements

## Read-only Fields

- Flow uses form fields to display read-only data, which sends mixed messages and hinders scanability
- Use a dedicated read-only pattern to display non-interactive field values

**“We need to get this in  
front of the CTO”**

-Jenny's response



**Present for Buy-In**

## **This is Rick, the CTO**

- A founding technical member of the enterprise
- Personally built a lot of the original digital tools
- Enterprise had taken a multimillion dollar profit reinvestment for 2026 and he helped set strategy for which projects were prioritized for that investment
  - I was careful to present this tactfully so as to not throw the original technology under the bus, but present recommended improvements



**“Yeah, this is obviously  
the direction we need  
to go.”**

-Rick's response

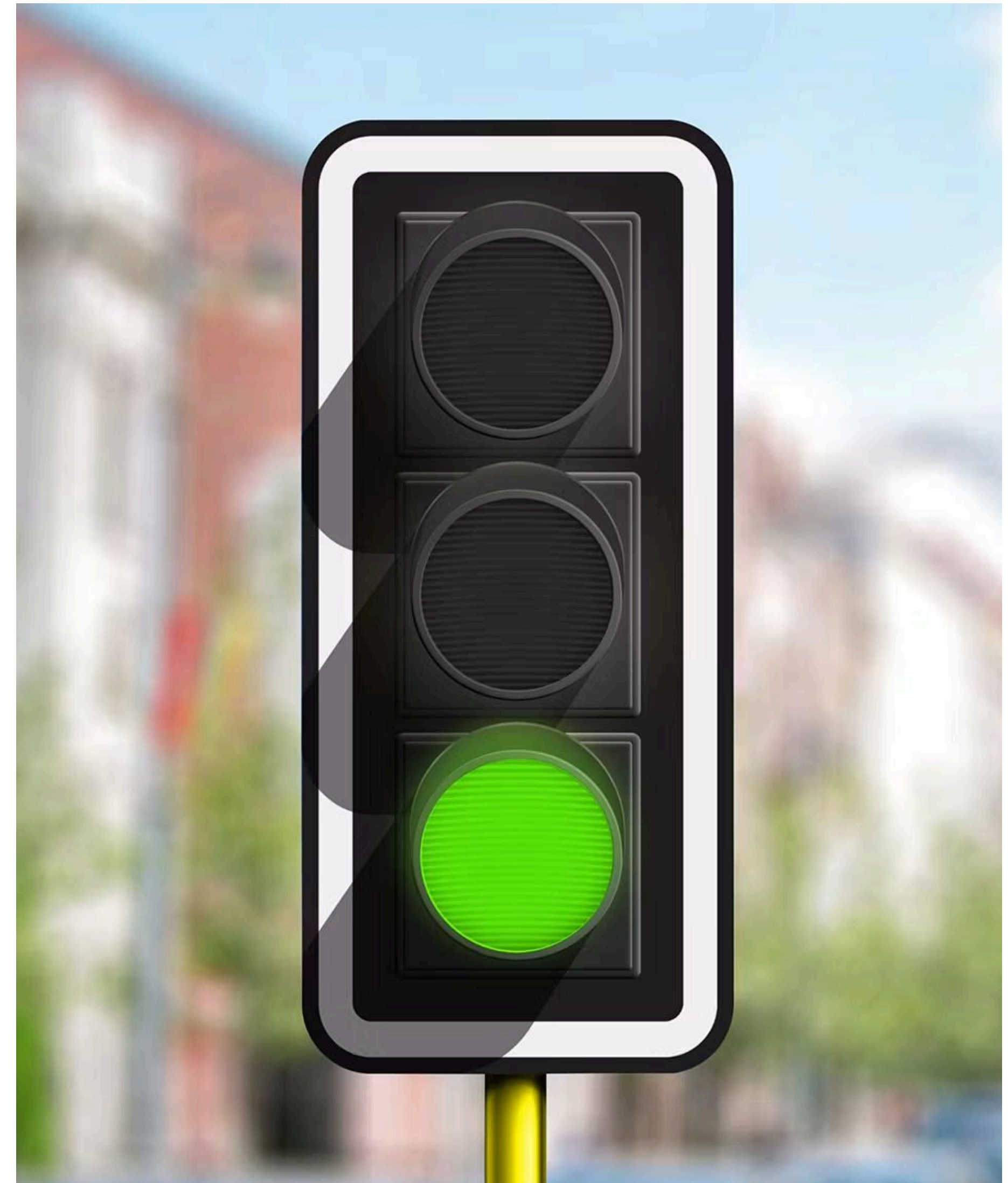


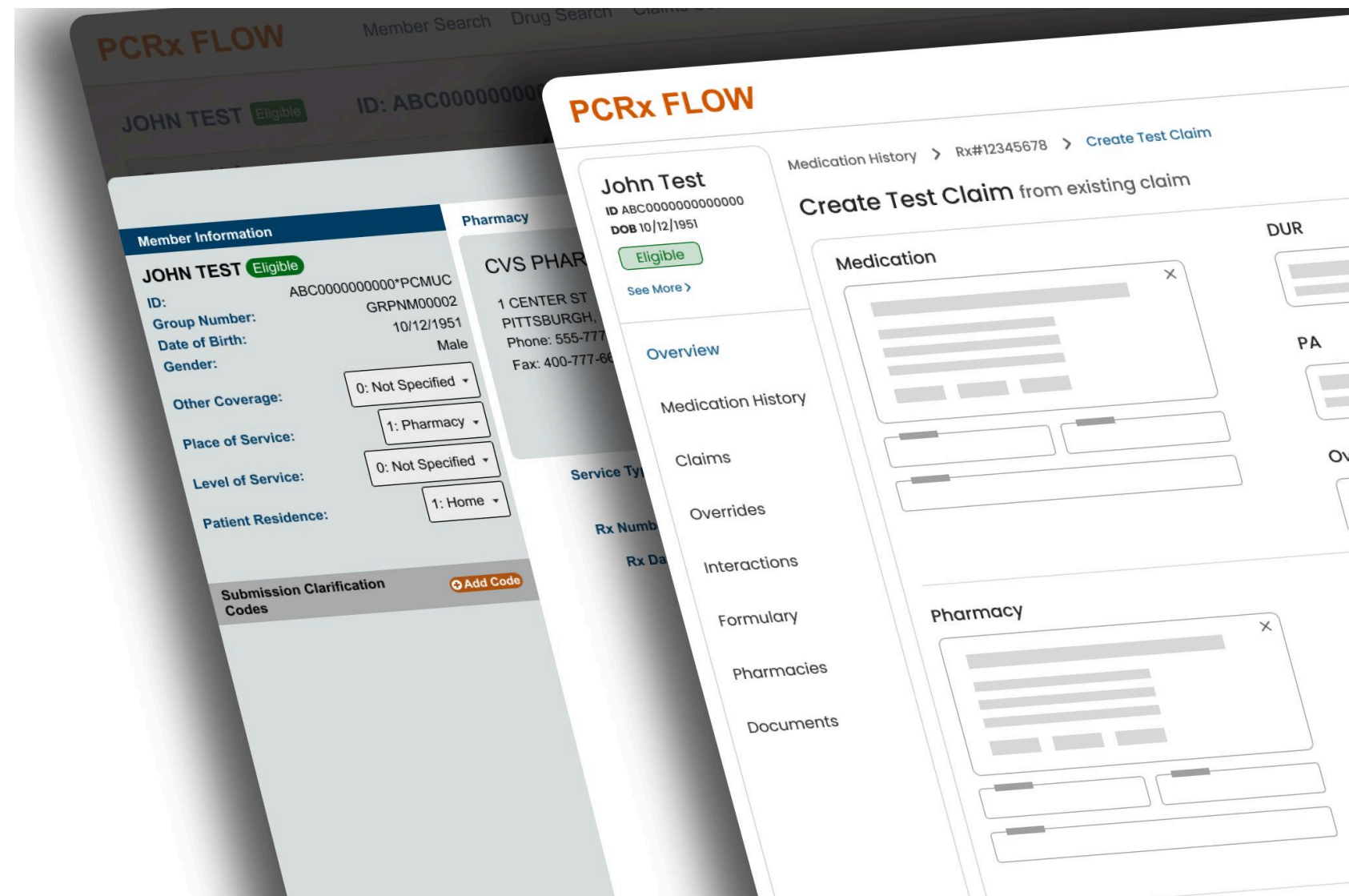
## Outcomes

# PCRx Flow Redesign Prioritized for 2026

Having previously sat on the back burner, PCRx Flow was now slated as a top project for 2026

- Received budget and resources to implement a full redesign and create a roadmap for future enhancements
- Product Manager hired specifically for this initiative
- CX/DX Team was now on the map companywide, due to this initiative, and my sharing the same presentation in front of an onsite planning panel
- I had the green light to flesh out the concepts for a full end-to-end redesign. See my case study **Redesigning Test Claims: Adapt & Deliver**





# Redesigning Test Claims: Adapt & Deliver

How I worked cross-functionally to resolve Test Claims pain points in an end-to-end redesign of a Member Support application

## Responsibilities

Qualitative Research

Prototyping

Cross-functional collaboration

## Timeline & Team

1 month, working with a Product Manager and a Business Analyst

## Outcomes

Delivered value despite constraints

Positive User feedback

Efficiency gains being measured

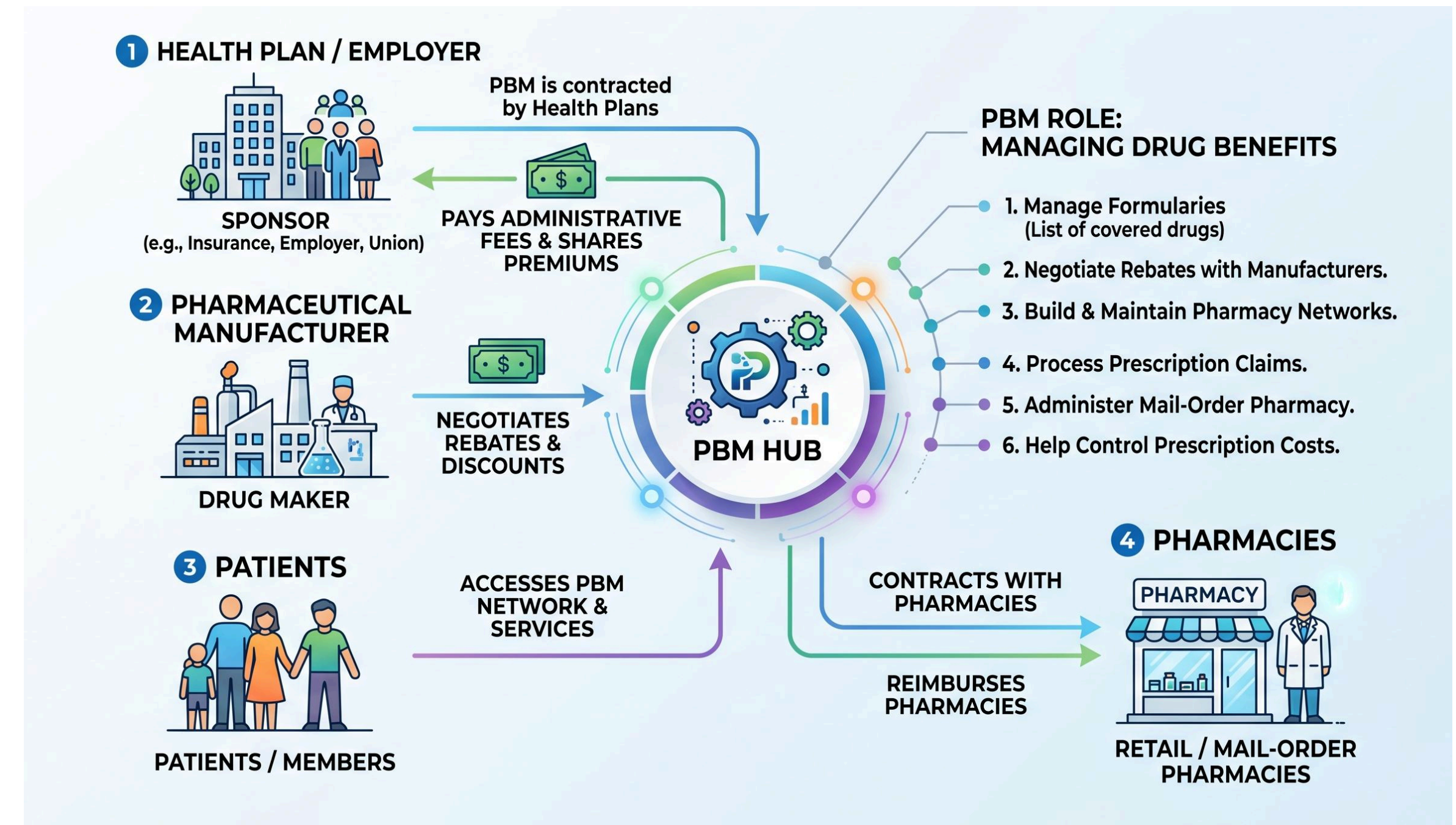
\*Mockups and screenshots in this project have been recreated from scratch and/or anonymized or abstracted to protect confidentiality



## Company Overview

# Pharmacy Benefit Manager, with custom built tools for setting up benefits, processing drug claims, and providing member & client support

Designers were hired to bring user-centered design and consistency across these homegrown apps

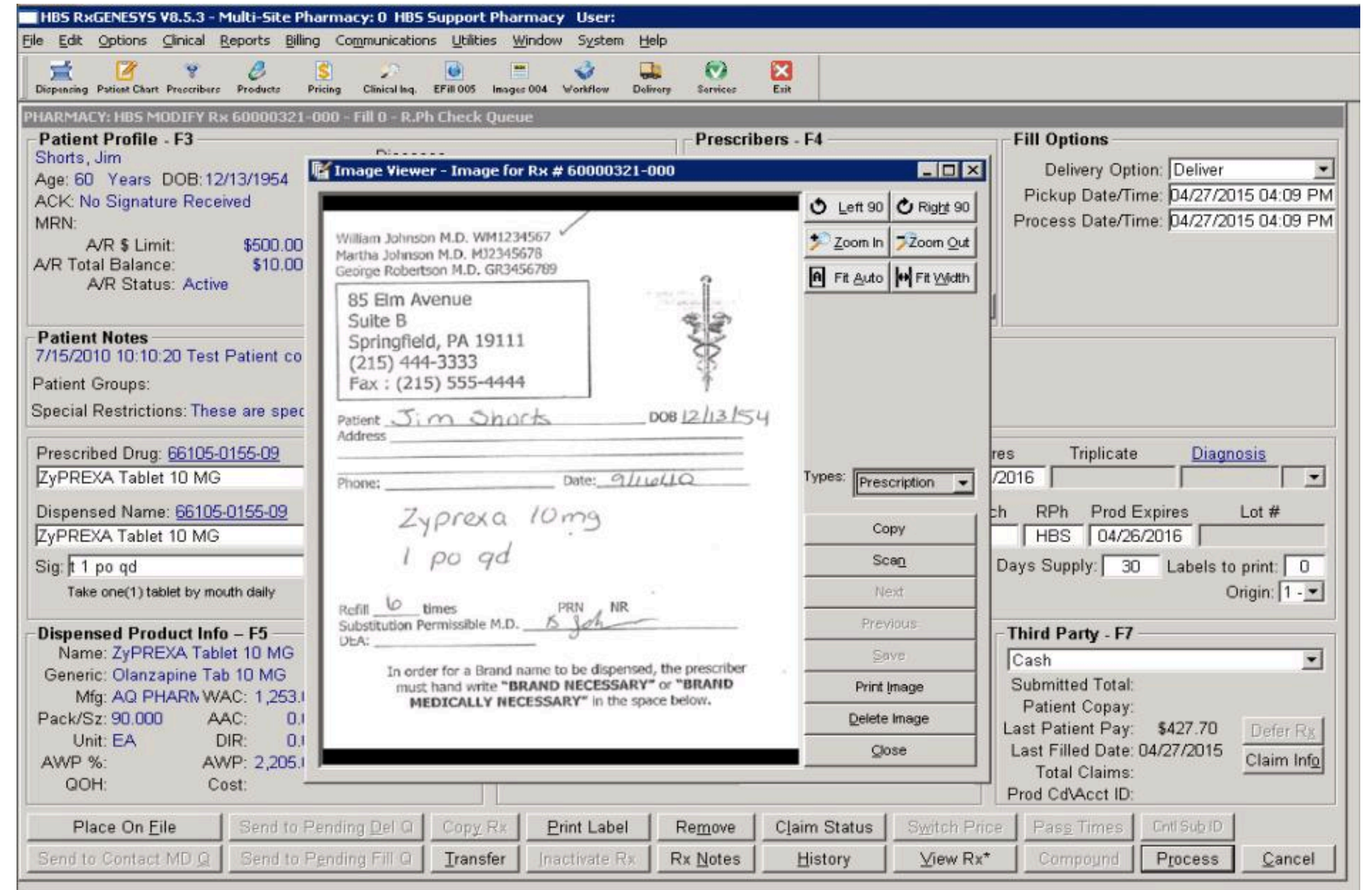




## Project Background

**PCRx is a 20 year old desktop application that runs EVERYTHING at this PBM**

Used internally for everything from benefit configuration to claims adjudication, running test claims, manual claims, and tracking communications with PBM members



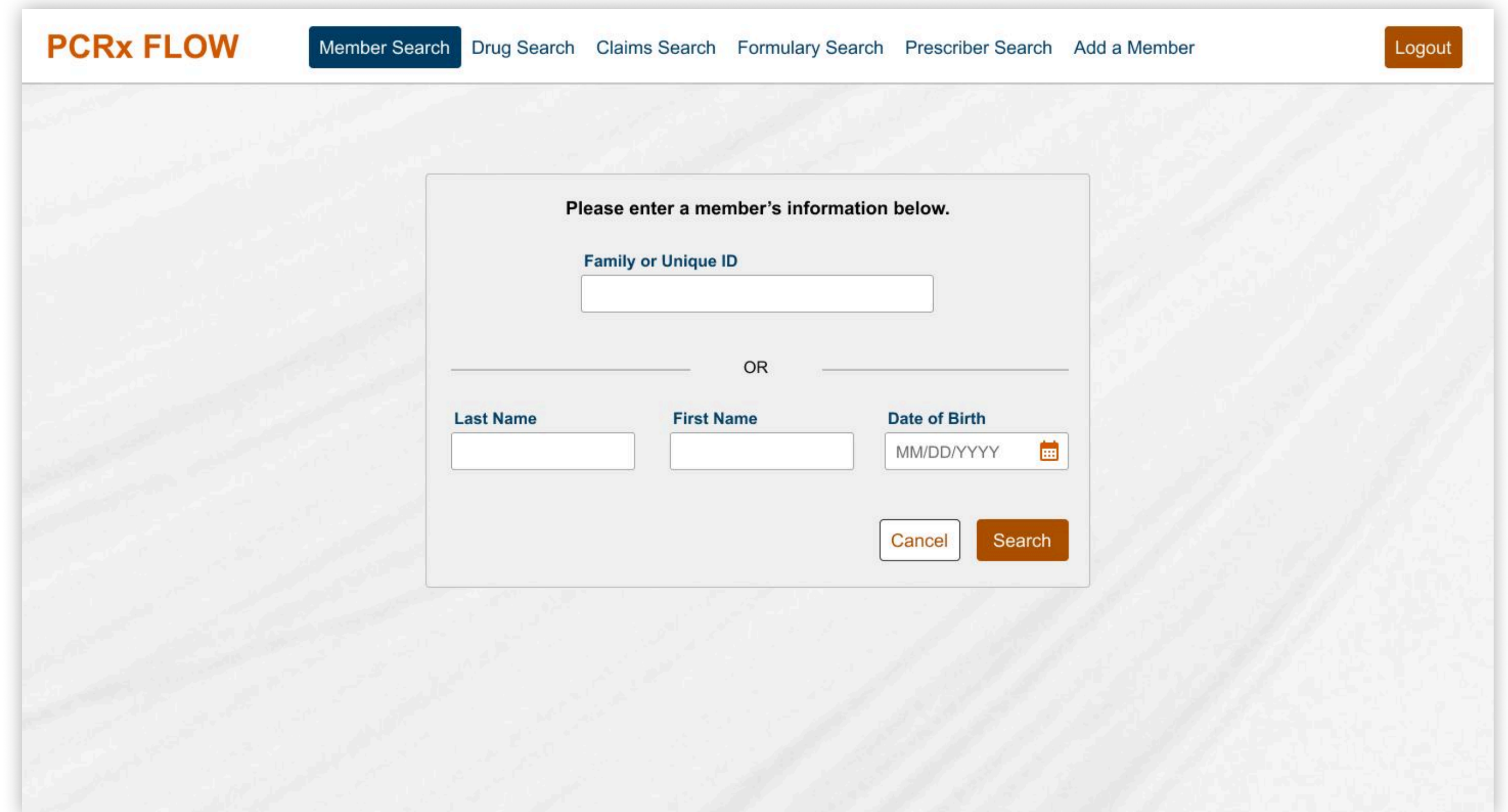
This isn't the real application, but it looks at least this busy and this dated



## Project Background

# PCRx Flow was a modernized version built to surface some of the PCRx data for clients

Built long before design was a practice at the enterprise, this ended up being a patchwork of reactive feature additions based on client requests, built with now aging UI components.



The image shows a web application interface for "PCRx FLOW". The header includes the logo and navigation links: "Member Search" (highlighted), "Drug Search", "Claims Search", "Formulary Search", "Prescriber Search", and "Add a Member". A "Logout" button is in the top right. The main content area features a modal form titled "Please enter a member's information below." with two input options: "Family or Unique ID" and a section separated by "OR" containing "Last Name", "First Name", and "Date of Birth" (with a calendar icon). "Cancel" and "Search" buttons are at the bottom right of the form.

Anonymized recreation

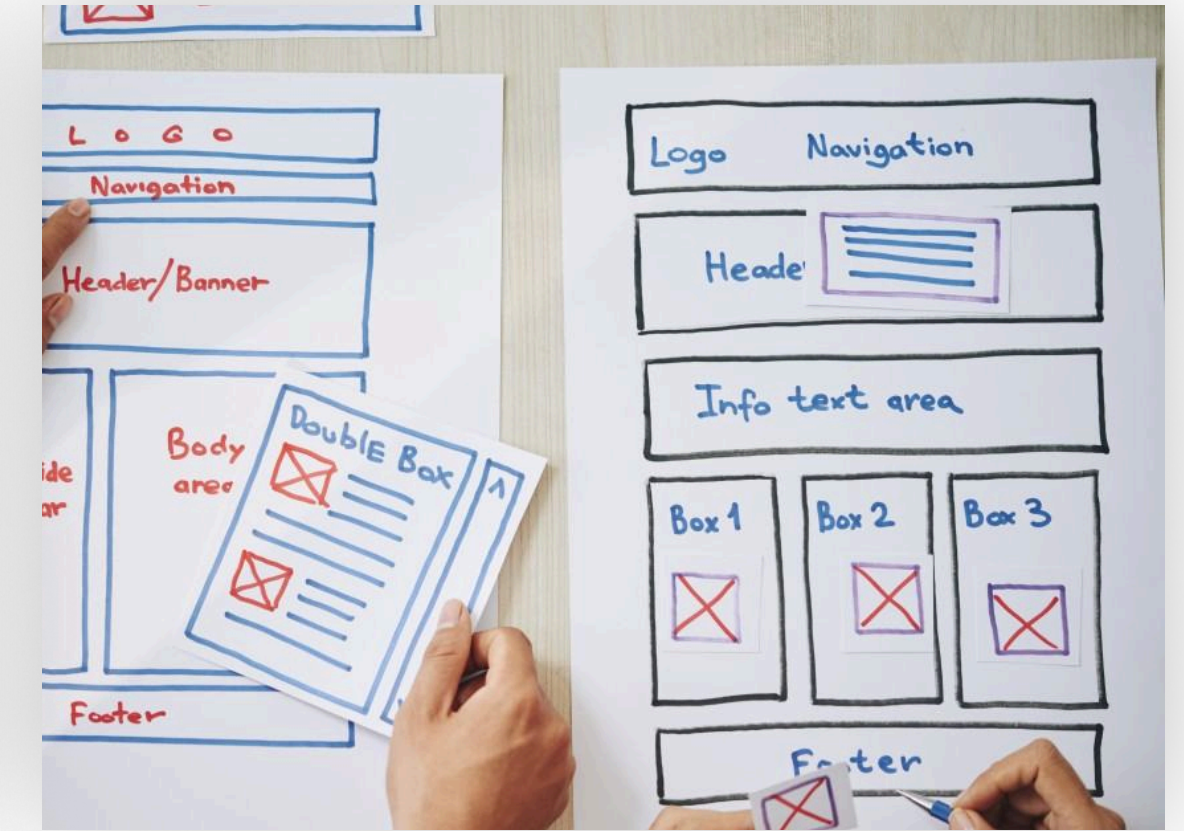
In my other case study, **Resurrecting PCRx Flow: Research, Rationale & Leadership Buy-In**, I told the story of how my user research and communication with stakeholders brought this app from the back burner to a top priority in 2026.



## Project Background

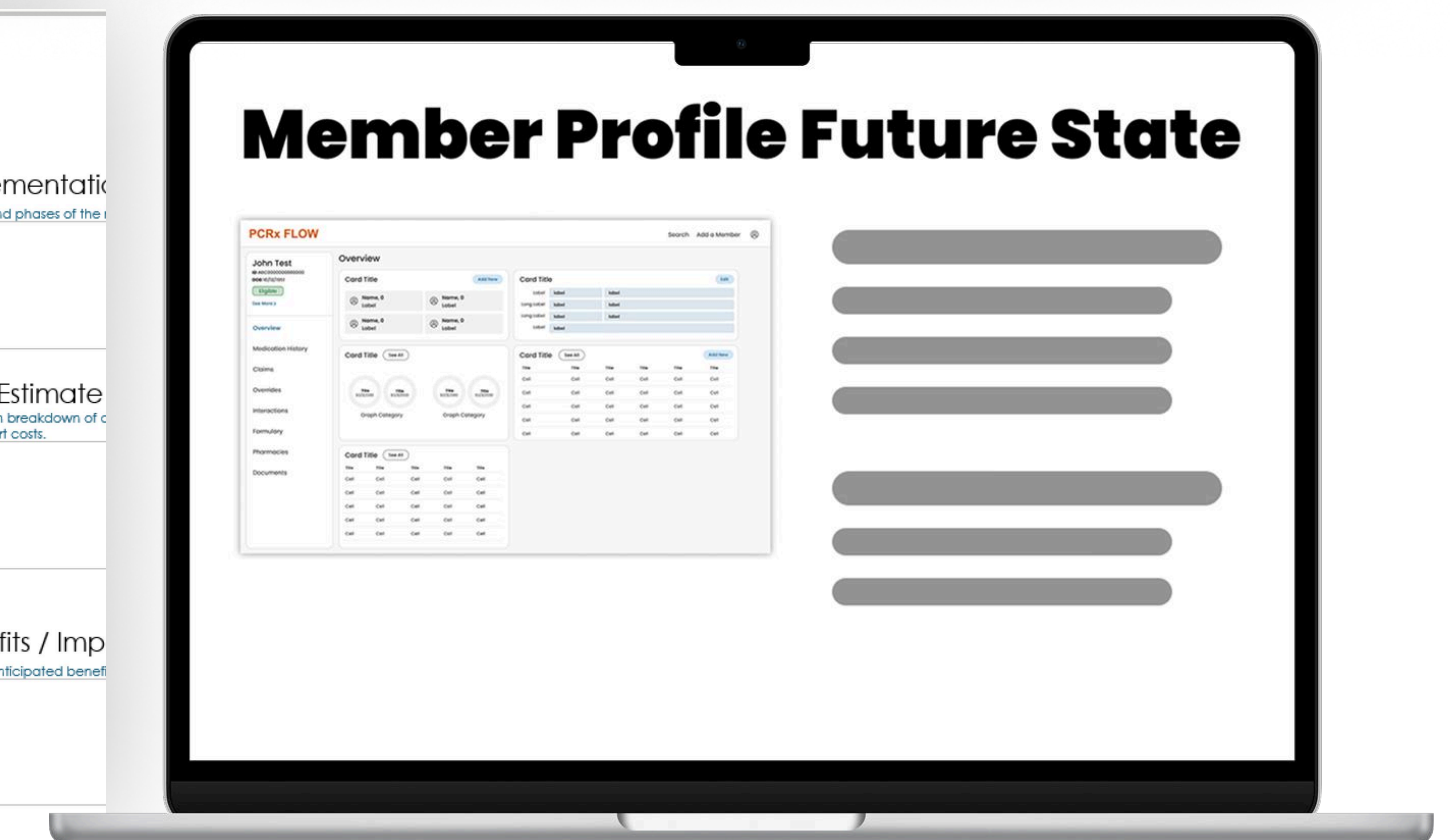
# The end-to-end redesign was given special priority and funding for 2026

- My user interviews and UI/UX analysis surfaced 4 core opportunities to provide value to our users
- I contributed to the creation of a Business Case for investing in a redesign of PCRx Flow
- I collected user validation and feedback on my conceptual prototypes
- And presented my recommendations with grounded rationale to Senior Leadership



### Simple Business Case Template

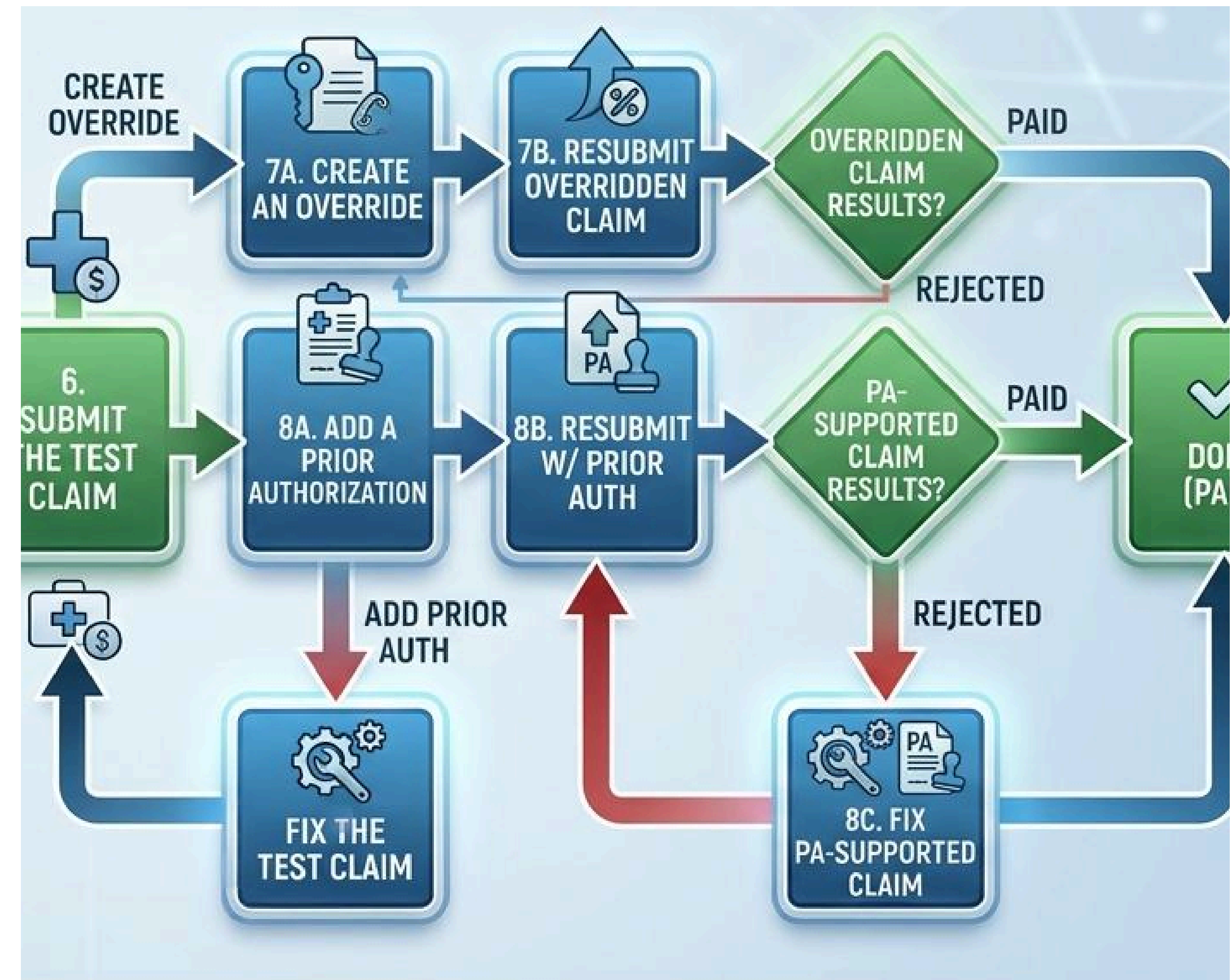
|                                                                                                                                                          |                                                                                                                            |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| <b>1. Project Overview</b><br><small>Briefly describe the problem this project aims to solve or the opportunity it aims to address.</small>              | <b>6. Implementation</b><br><small>List key steps and phases of the implementation.</small>                                |
| <b>2. Background / Current Situation</b><br><small>Summarize the current context or environment related to the problem or opportunity.</small>           | <b>7. Cost Estimate</b><br><small>Provide a rough breakdown of the project costs, including ongoing support costs.</small> |
| <b>3. Proposed Solution</b><br><small>Outline the recommended solution, including a summary of what it will do and how it addresses the problem.</small> | <b>8. Benefits / Impact</b><br><small>Describe the anticipated benefits and impact of the solution.</small>                |
| <b>4. Technical Requirements and Integration</b>                                                                                                         |                                                                                                                            |



## A focus on Test Claims

As part of the resulting end-to-end redesign, one big focus I had was the Test Claim creation workflow

This was both a core workflow and a significant area of friction for users





## Project Background

# What are Test Claims?

When users get calls from members about drug claims that didn't go through, they create mock claims to simulate the real thing and investigate the issue(s)

Sometimes they have to work through several issues - or rejections - to get the claim to pay

- **Helpful existing feature: they could populate a test claim form with info from an existing claim**



Test Claims are like crash tests for drug claims

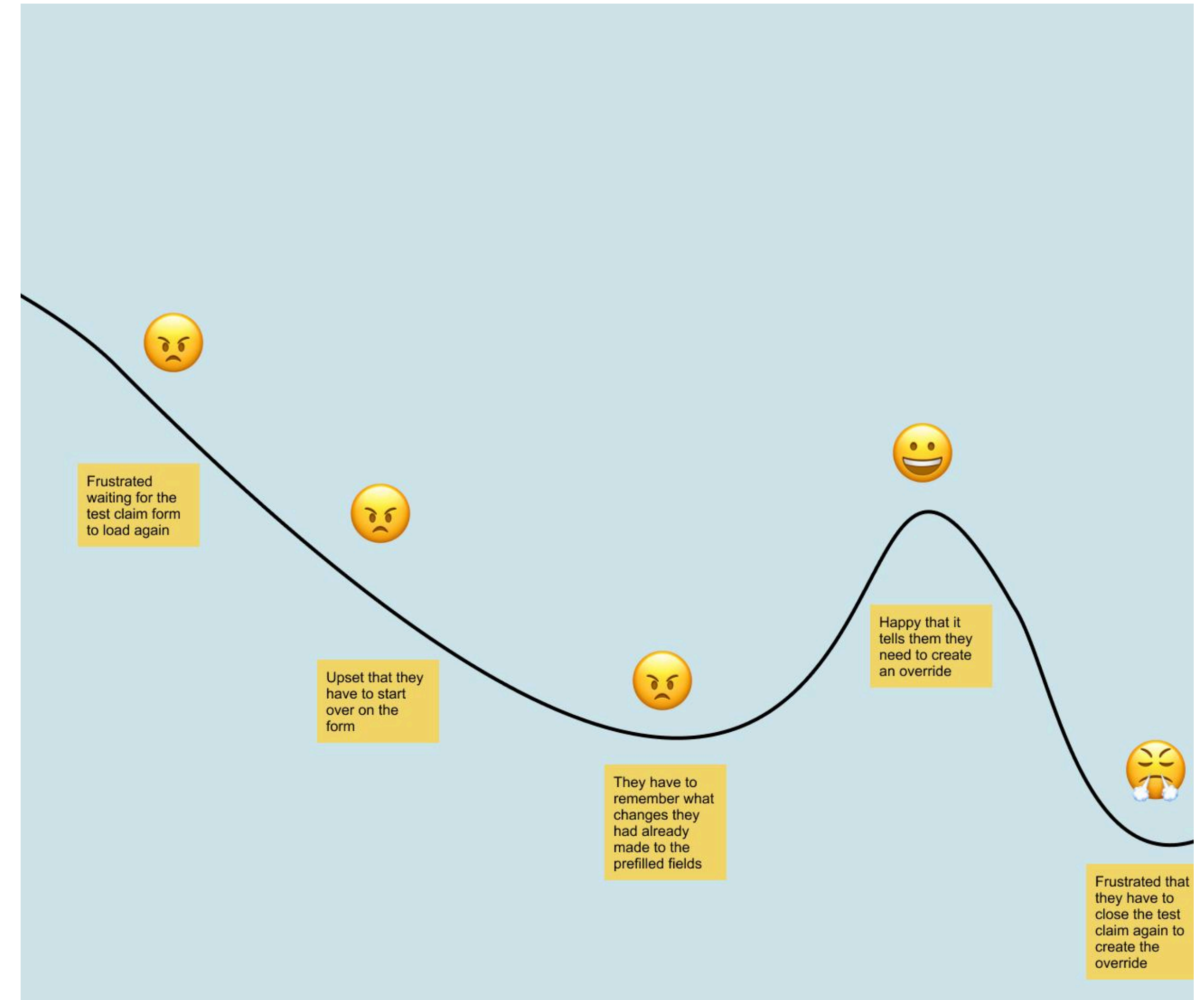


## User Research

# Points of Frustration

When I met with users about Test Claims, they had significant pain points

- When a Test Claim was created from an existing claim, it was impossible to view the original claim response to inform submission of the Test Claim, without abandoning the Test Claim form
  - Time spent navigating away and coming back
  - Cognitive load of remembering what they went to look at
- If a Test Claim was rejected because it needed an override, it was impossible to add the override without abandoning the Test Claim flow and starting over again upon returning.





## Design & Prototyping

# Bringing the Original Claim Response to the Test Claim flow

I rearranged the form to allow the original claim response to display on the page and be accessible at any time during test claim creation.

But was it okay to introduce some scrolling?

- The existing Test Claim form required no scrolling
- My redesigned version would add vertical scroll
  - During feedback sessions users were completely okay with that trade-off
  - This also made it more scalable in case this form had to grow to accommodate other cases in the future, like manual claims

The original form is titled "PCRx FLOW" and includes a top navigation bar with links for Member Search, Drug Search, Claims Search, Formulary Search, Prescriber Search, and Add a Member. Below this is a header section for "JOHN TEST" (Eligible), ID: ABC0000000000\*PCMUC, DOB: 10-12-1951, 73 years, Gender: M, and a Member Options dropdown. The main form is titled "Test Claim" and has "Cancel" and "Submit" buttons. It is divided into several sections: Member Information (JOHN TEST, Eligible, ID, Group Number, Date of Birth, Gender, Other Coverage, Place of Service, Level of Service, Patient Residence), Pharmacy (CVS PHARMACY #05011, address, phone, fax, NPI, NCPDP), Medication (ATORVASTATIN, NDC, GPI, Qty, Days Supply, Submitted Ingr. Cost, Gross Amt. Due), Prescriber (John Johnson, address, phone), DUR Information, Diagnosis Codes, and Prior Auth Info. Each section has an "Add Code" or "Add PA" button. The form is labeled "Original" in the bottom left corner.

The redesigned form is titled "Create Test Claim from existing claim" and has "Close" and "Send Test Claim" buttons. It is divided into three main sections: Medication, Pharmacy, and Prescriber. Each section has a "Redesign" button. The Medication section includes fields for Medication, DUR, PA, Overrides, and Pharmacy. The Pharmacy section includes fields for Pharmacy, DUR, PA, Overrides, and Prescriber. The Prescriber section includes fields for Prescriber, DUR, PA, Overrides, and Pharmacy. The form is labeled "Redesign" in the bottom left corner.

## Design & Prototyping

# Bringing Overrides into the Test Claim flow

I added an Overrides section to the form to allow creation of two of the most common types of overrides within a Test Claim

- Refill Too Soon was 5X more common than others, according to data from the analytics tool Grafana
- Users interviewed mentioned Refill To Soon more than any other type of override, and anecdotally considered it was used “99% of the time”
- I verified in user interviews that Quantity Limit Overrides often accompanied Refill Too Soon Overrides

**Create Override**

Type  
Refill Too Soon

Start Date  
MM/DD/YYYY

End Date  
MM/DD/YYYY

Reason

MONEY  
M -

☐ Include Quantity Limit Override

Cancel Create Override

**PA**

**Overrides**

**Rejected**  
13: PA Required

**Rejected**  
76: DUR

**Rejected**  
124: DAW

**Rejected**  
10: Refill Too Soon

**Additional Message**  
Refill Too Soon override requires a DAW-1 over the formulary exception



**But then I spent 2 days locked in a virtual room with the PM, the BA, and the Lead Developer**

We discovered a few constraints that would require adapting the design

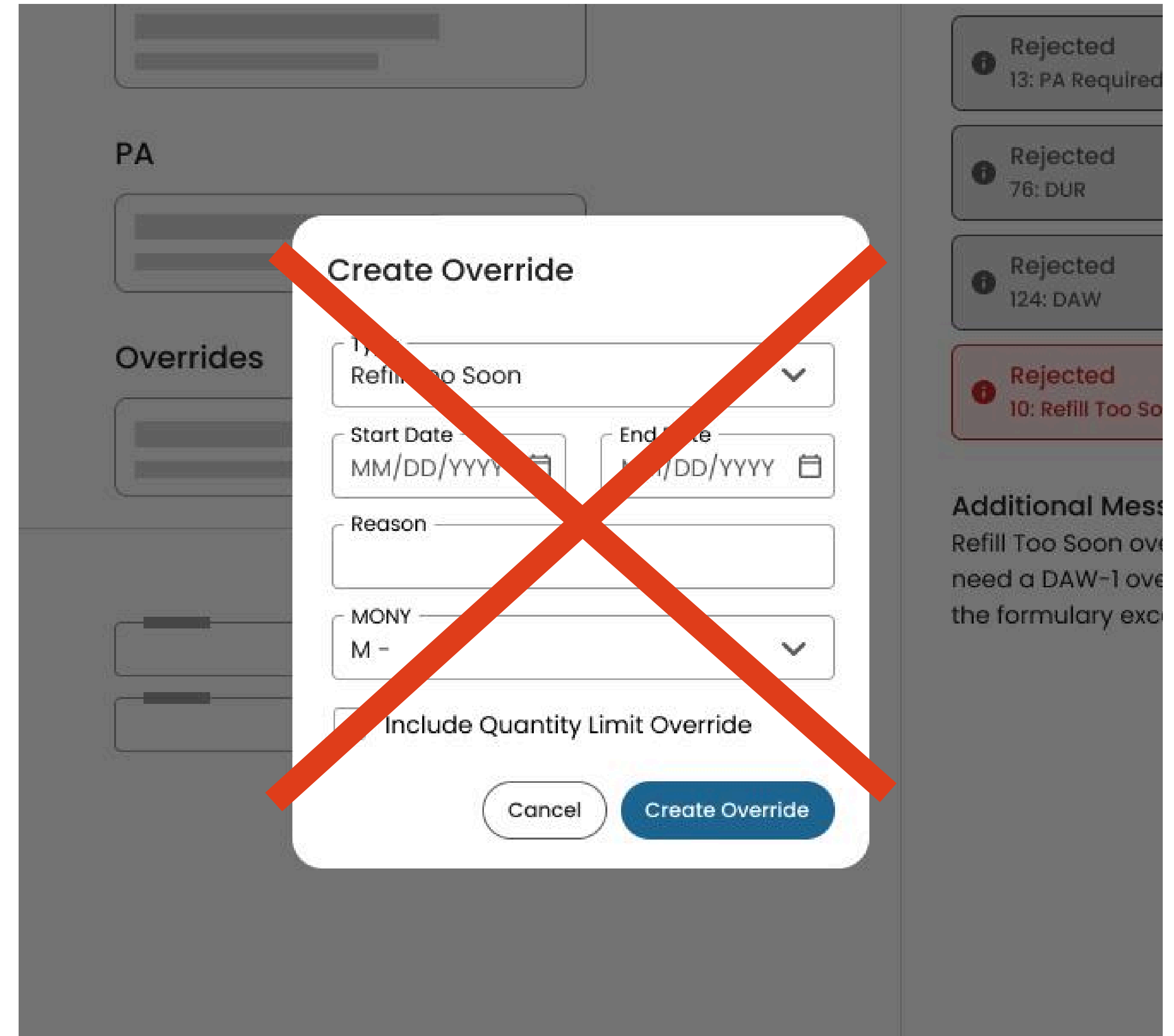
## Design & Prototyping

# My design for integrated overrides was technically Impossible

There wasn't a viable way to have a fully integrated sub-flow, at least the way I designed it, for adding an override within the Test Claims form

- Complex upstream logic rules for detecting duplicate overrides
- In some cases Refill Too Soon overrides had to be created by editing active overrides rather than creating new ones

I would have to adapt my design to deliver value to the users within this constraint



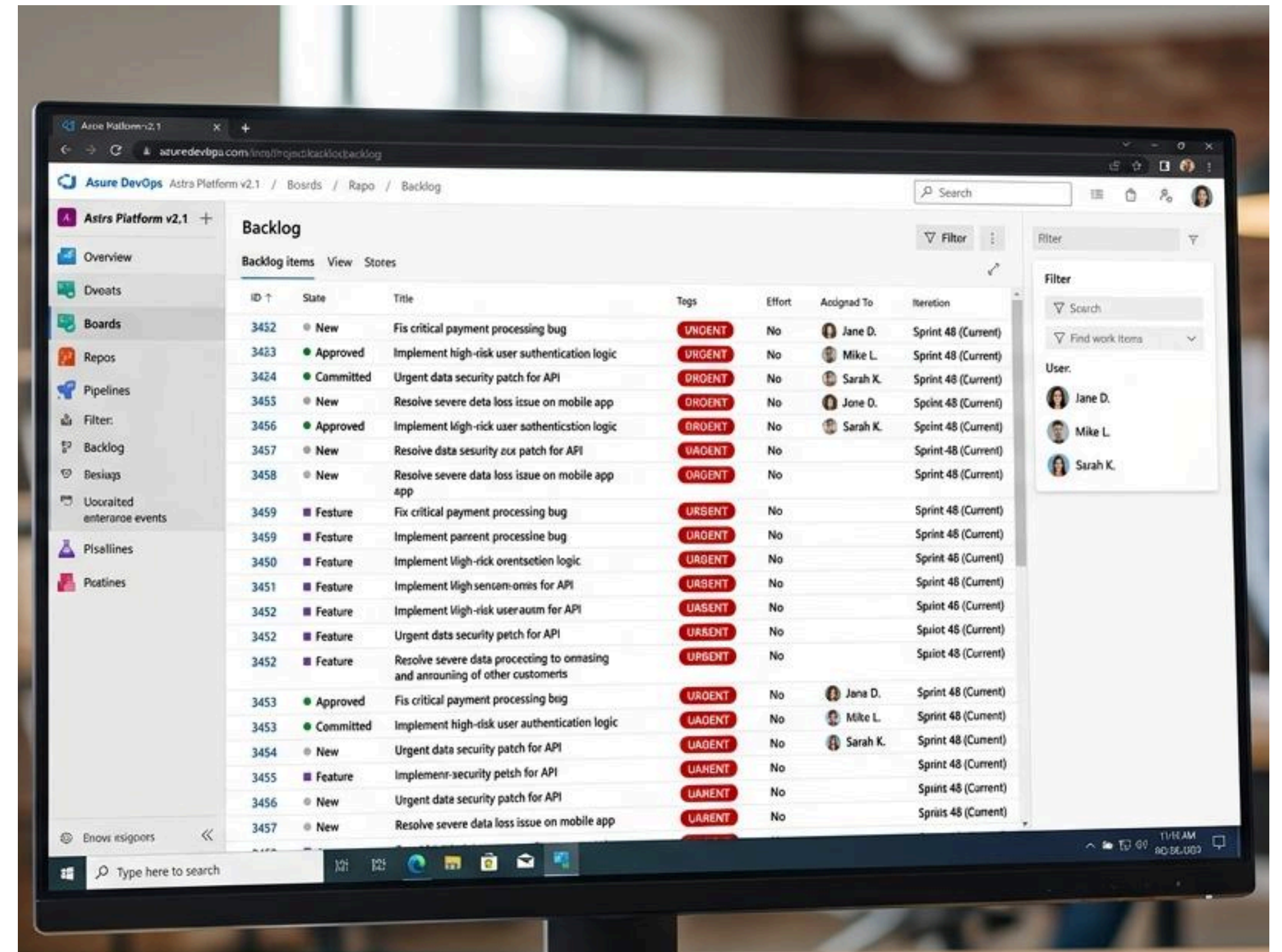


## Design & Prototyping

# Business Pressure

At the same time, the enterprise was accelerating this project

- As the sole designer, I was responsible for preparing end-to-end designs in a very short time frame, so there was a big time constraint on this feature
- I had to deliver something quickly without giving up the value this feature was intended to provide to the users.



**So I had to design the next best thing under the circumstances**



Design & Prototyping

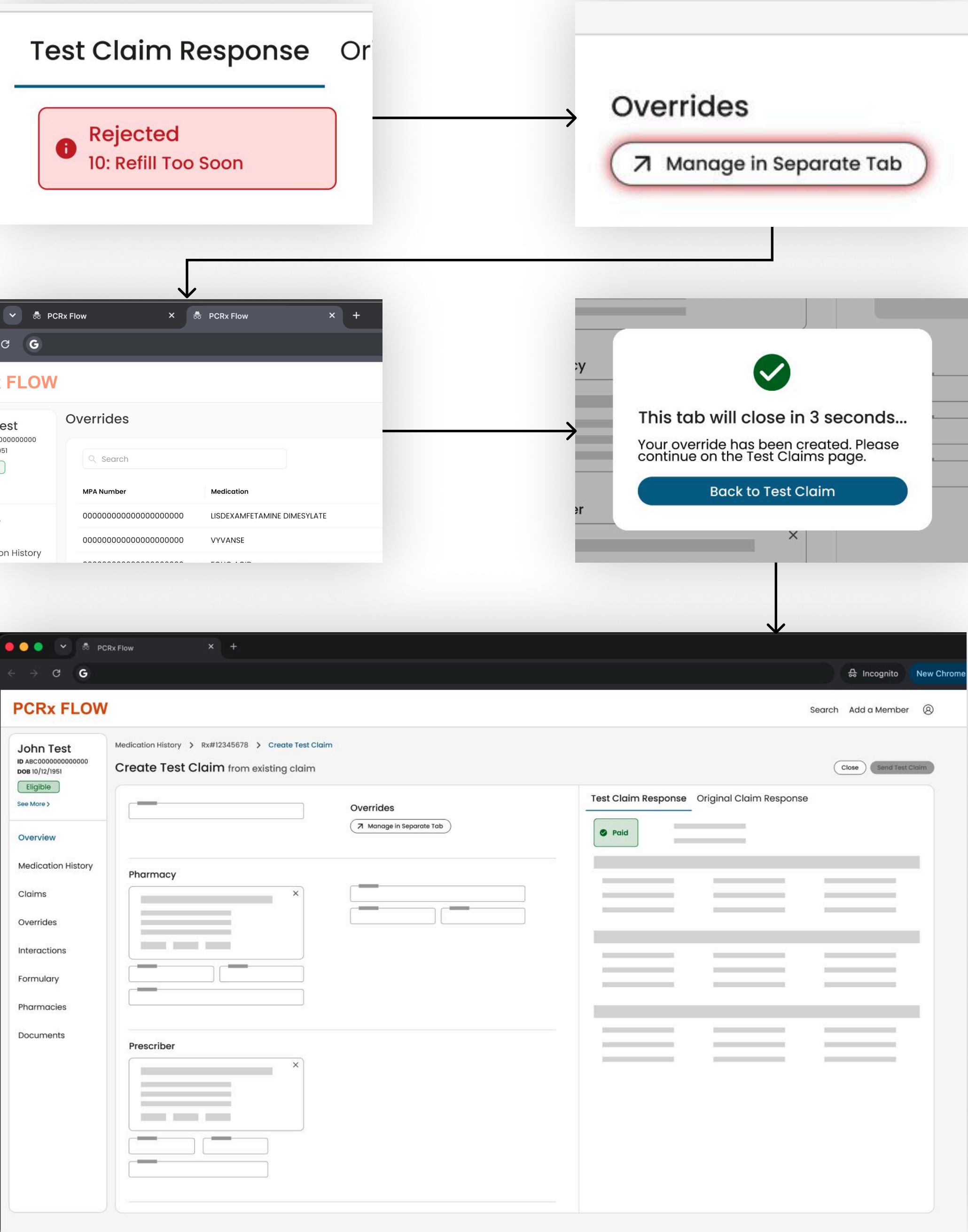
Adapted Design

When a rejection came in requiring a Refill Too Soon override (or any other rejection), the form would scroll to that field or section and highlight it

The overrides button, when clicked, would open the overrides page in a separate browser tab

Via a deep link, the application would know that the user came from the Test Claim flow, and would automatically close the tab once they saved, so that they would return to the test claim flow

The user could then resubmit the test claim



**Although not ideal, this design  
preserved the main goal of the Test  
Claims update:** Avoid making the user  
abandon the flow to manage Overrides



## Outcomes

# Feature is in Development

Users are excited to get an update to this core (but sometimes troublesome) workflow

- They responded very positively to the prototypes

Continuous Improvement team is measuring efficiency gains

- Taking baseline timings on the current workflow
- Will be taking timings on the new flow to measure improvement

Having seen just how much the task flow interruptions currently bog down this flow in the current app, I expect significant improvement.



## Outcomes

# Successful Delivery of Value

Despite project acceleration and technical limitations, I delivered a design that:

- Did not compromise on the core value intended to deliver to users: **complete a Test Claim more efficiently by eliminating cause to abandon the creation form to complete supporting tasks**

