Product and UX Design Exercise

J11

Health Haven
App Registration

Overview

The goal of this example exercise was to create a mobile app patient registration flow for a telehealth company, Health Haven. Requirements emphasized efforts toward branding and core, information-gathering flows needed to establish a "version one" app.

I applied my typical design process — discover, define, design, discuss — to create a first working version of this registration flow. Being a sample exercise completed in one day, I showed truncated versions of each process step and noted where I'd continue research, testing, or design rounds.

In this document, I discuss each of the four design process steps I followed.

Discover

First, I collected some information to supplement the exercise prompt.

Competitive Analysis

This quick review of other services' registration flows helped me identify good ideas to use in my own designs for Health Haven. It also helped me identify where this flow could stand apart from them.

Service	Thoughts	Good ideas	Ideas to avoid
CityMD	Ubiquitous in the city, but fairly impersonal	— Progressive disclosure when choosing insurance information — Only two pages of questions (again, with conditional sections depending on patient responses)	— Too many fields at once? — Accessibility failures… — Terms may not be friendly for a novice — Vertical centering of the form, which causes jumps
One Medical	Premium service with a premium charge	— Copy is personalized as info is provided — Focused sign-up flow with understandable IA — Progress bar	— Misplaced branding in spots (e.g., "our appts start on time! Anyway what's your birthday") — Some questions seem split up unnecessarily (like first name and last name) — Can't go back the whole way in the flow

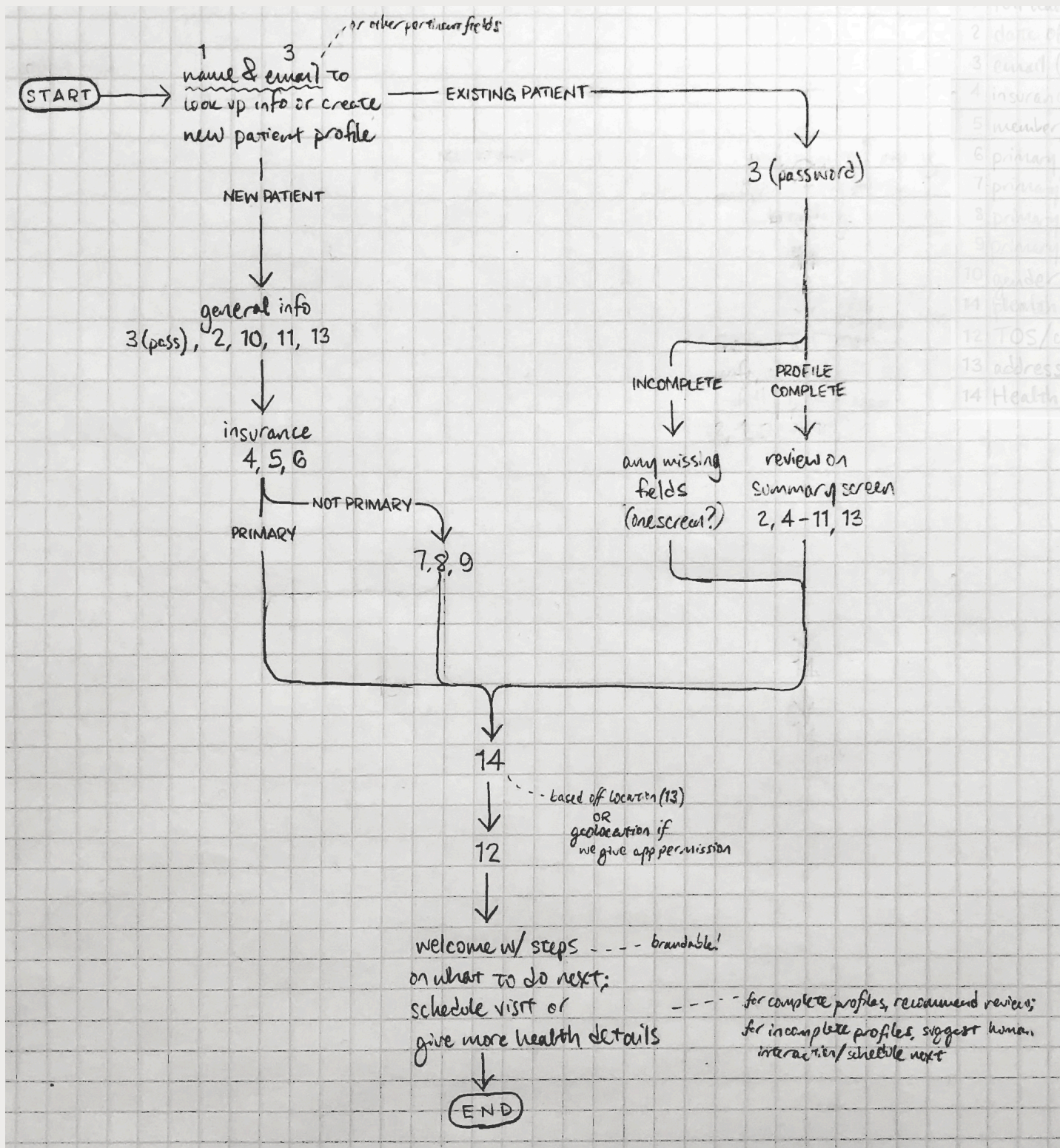| Service	Thoughts	Good ideas	Ideas to avoid
Teladoc	Service that allows for direct sign up or for whitelabeled service via other providers	— Escape hatch: phone number to call with questions in the flow — Clear options for accessible access — Clear post-reg options, distinct from a general dashboard/home page	— Some info is repeated in the sign-up process due to step flow (profile, then insurance, then back to more profile things) — Progress is too broad to be meaningful

Takeaways

Based off of these quick comparisons, I identified these areas in which our product could stand out:

- Use a natural progression when collecting info, aiming for logical groups that should help us balance too few and too many fields on screen

    - Whenever possible, allow previous decisions to inform later ones

- Use proper progressive disclosure throughout when more info can't be avoided

- Allow branding to shine through when appropriate, especially at the start and end of the flow

- Make "next steps" conditional based on how much time the patient spent filling out the form

    - Two basic personas, "new patient" and "existing patient" can be useful when discussing design decisions with others

Define

From that competitive analysis, I combined the parts that seemed to work best and tried a few groupings of fields to dictate necessary screens.

The most promising combination of fields and steps is in the (cleaned up) user flow on the following page. The 14 captured fields are an assumption based off of my knowledge and what I learned from competitor products; product requirements would hold more detailed field info and constraints.
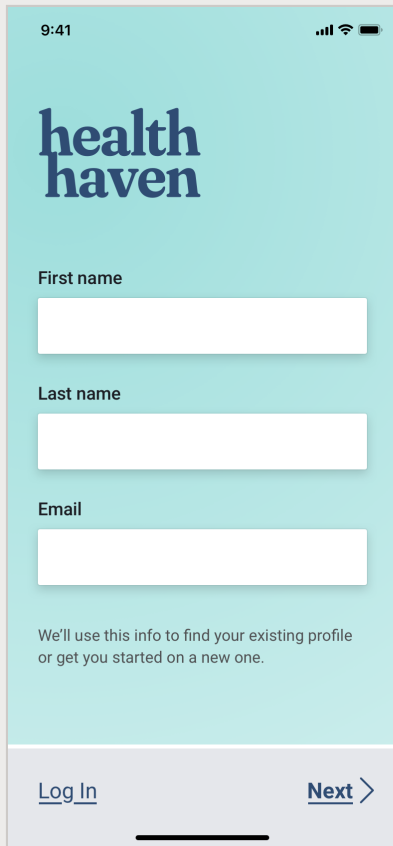
Flowchart (hand-drawn):

- **START** → name & email to look up info or create new patient profile ¹ ³ *(... or other pertinent fields)*

- **EXISTING PATIENT** → 3 (password)
  - **INCOMPLETE** → any missing fields (one screen?)
  - **PROFILE COMPLETE** → review on summary screen 2, 4–11, 13

- **NEW PATIENT** →
  - general info 3 (pass), 2, 10, 11, 13
  - insurance 4, 5, 6
    - **PRIMARY**
    - **NOT PRIMARY** → 7, 8, 9

- → **14** ---- based off location (13) OR geolocation if we give app permission
- → **12**
- → welcome w/ steps on what to do next: schedule visit or give more health details ---- brandable!
  ---- for complete profiles, recommend review; for incomplete profiles, suggest human interaction/schedule next
- → **END**

Legend:

#	Field	#	Field	#	Field
1	full name	6	primary patient or not?	11	phone
2	date of birth	7	primary's full name	12	agreements/consent
3	email	8	primary's date of birth	13	address, city, state, ZIP
4	insurance provider	9	primary's relationship	14	preferred doc location
5	member/group IDs	10	gender		

Design

I decided to sketch for an iOS app, although this could easily be a responsive web app.
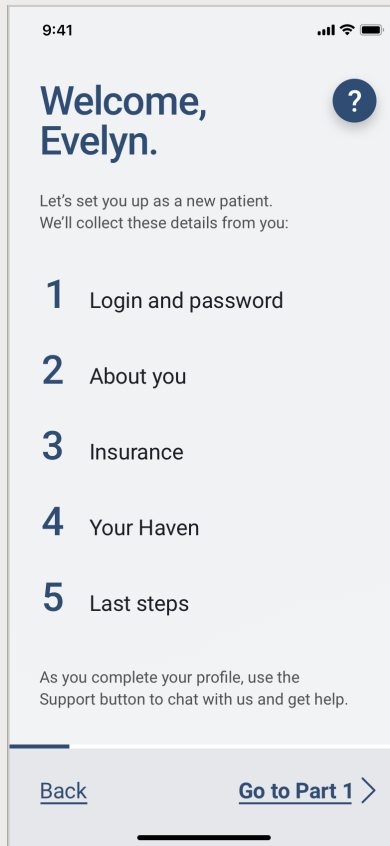After lo-fi sketches (below), I created hi-fi mockups (following two pages).

Landing/start

health haven (?)

Get started

first

last

email

We'll use this info to find your info or to set up your new profile.

Log in   Next >

Existing patient (lookup worked)

health haven (?)

Hi, Francisco.

Your physician has already added most of your health information. We have a few final steps:

1 Create a password

2 Review your information

3 Pick your haven

4 Last steps

Set up as new patient >

Back   Next >

Main office selection

health haven (?)

Pick your haven

Manhattan	Brooklyn
45 Vesey St	306 Water St
1.7 miles away	0.37 miles away

use provided address for distance

auto-select closer clinic

Back   Next >

New patient

health haven (?)

Welcome, Denise.

Let's set you up as a new patient. We'll collect these details from you:

1 Login and password

2 About you

3 Insurance

4 Your haven

5 Last steps

Back   Next >

progress bar (segmented?)

screens are divided by the listed section headers and scroll when needed

Credentials

matches whichever persona

health haven (?)

Login and password

Email (prefilled from 1st screen)

Password

Your password needs to meet these:

Back   Next >

Help tapped

health haven (?)

Support   Close

We're happy to answer your questions about creating your profile or anything Haven related.

Call 1 (800) 55-HAVEN

Email hello@healthhaven.co

iMessage live support

Screen 1 (Health Haven login)

health haven

First name

[ ]

Last name

[ ]

Email

[ ]

We'll use this info to find your existing profile or get you started on a new one.

Log In   Next ›

Screen 2 (Welcome)

Welcome, Evelyn.   ?

Let's set you up as a new patient. We'll collect these details from you:

1   Login and password

2   About you

3   Insurance

4   Your Haven

5   Last steps

As you complete your profile, use the Support button to chat with us and get help.

Back   Go to Part 1 ›

Annotations (right column)
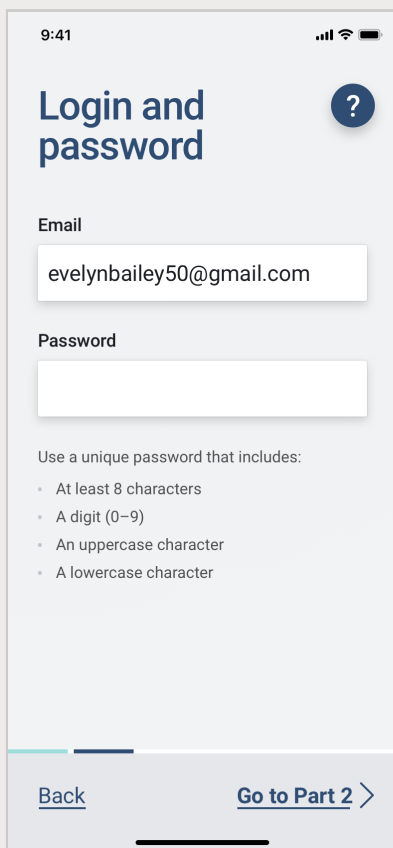
Top row:

— Unified log in screen on app launch

— Greeting screen, in the case where no existing info for the patient was found

Bottom row:

— Part 1, in progress, where email is filled in

— Part 1, in progress, where password does not meet criteria

— Part 1, after tapping the "?" help button

Screen 3 (Login and password)

Login and password   ?
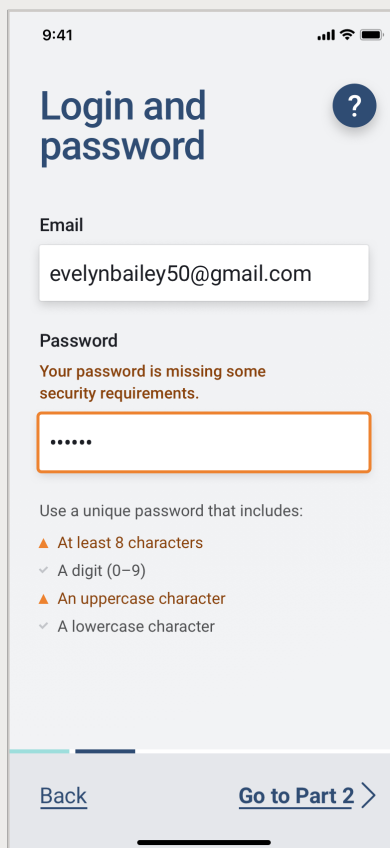
Email

evelynbailey50@gmail.com

Password

[ ]

Use a unique password that includes:
· At least 8 characters
· A digit (0–9)
· An uppercase character
· A lowercase character

Back   Go to Part 2 ›

Screen 4 (Login and password — error)

Login and password   ?
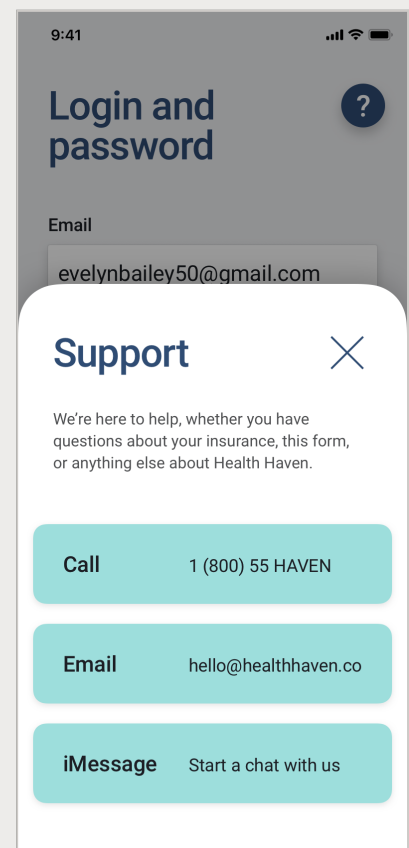
Email

evelynbailey50@gmail.com

Password

Your password is missing some security requirements.

••••••

Use a unique password that includes:
▲ At least 8 characters
✓ A digit (0–9)
▲ An uppercase character
✓ A lowercase character

Back   Go to Part 2 ›

Screen 5 (Support overlay)

Login and password   ?

Email

evelynbailey50@gmail.com

Support   ✕

We're here to help, whether you have questions about your insurance, this form, or anything else about Health Haven.

Call   1 (800) 55 HAVEN

Email   hello@healthhaven.co

iMessage   Start a chat with us

Top row:

— Part 2, demographic information (software keyboard causes content to scroll)

— Part 3, insurance information

Bottom row:

— Part 4, choosing one of the two "home" doctor office locations

— Part 5, last agreements

— Finish screen, showing "get help right away" set of call-to-action buttons at bottom

---

9:41

About you ❓

Birthday

Month	Day	Year

Gender

Select…

Phone

☑ This phone can receive text messages

Address

Street	Apt, Unit, Floor
City	State	ZIP Code

Back   Go to Part 3 ›

9:41

Insurance ❓

Insurance provider

Select…

Member ID

Group ID

☑ I am the primary cardholder
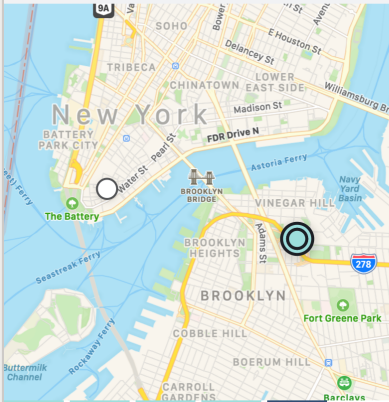
Back   Go to Part 4 ›

9:41

Your Haven ❓

Manhattan	Brooklyn ✓
35 Water St	45 Vesey St
1.7 miles away	0.4 miles away

Back   Go to Last Steps ›

9:41

Last steps ❓

Almost done — review these policies and agreements to complete your profile.

☑ I agree to the Terms of Service

☑ I agree to the Privacy Policy

☑ I consent to electronic delivery of my health data

You can also subscribe to receive updates when new services are available for you.

☑ Send me occasional updates (optional)

Back   Finish ›

9:41

health haven

You're all set, Evelyn!

You can reach out to us right away and visit our clinic whenever you need to.

Start a Video Chat

Schedule a Visit

To reduce the scope for this exercise, I decided to create high-fidelity mockups for the case of a totally new patient (the case where there was no information received when trying to look the patient up). Where the totally new patient must fill in each field, the existing-but-not-yet-established patient sees a summary screen to scroll through and review. If changes are necessary, tapping the section opens a field identical to that of the totally new patient.

I included an error state for the password and the Support sheet to show two examples of handling paths that deviated from the ideal user flow.

One interesting note: a single "full name" field is a better way to capture names from around the world. However, healthcare databases have strict requirements, and as such, the login is forced back into a first-last name pattern.

I created the mockups in Sketch. To speed up production, I created components with variants and an interactive prototype to test the flow (right).
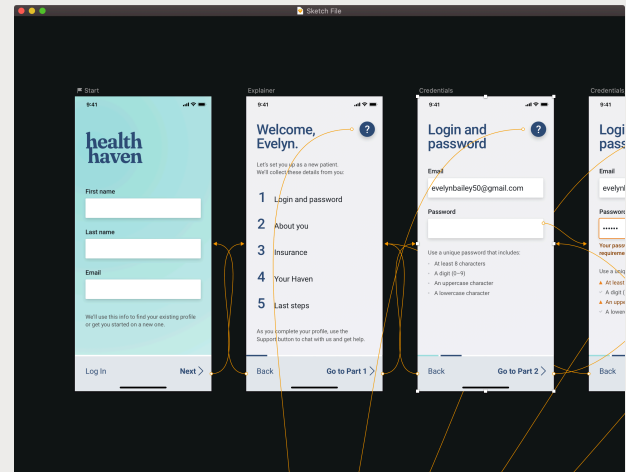
Discuss

Normally, my design process would include stakeholder feedback discussions and user testing with key personas. It'd be an iterative approach along the way as well as a final checkpoint before launching a first version. For this condensed exercise, I relied more heavily on competitive analysis.

Assumptions

For the purposes of this exercise, I made several assumptions that are excellent things to test and verify during and after the design process.

- There is an equal chance that someone is either a brand new patient or an existing patient that is setting up their profile for the first time.

- The data that the primary care practice collected includes a unique email that can be used for patient lookup. When looking up data, the process is completed in a secure way so that someone can't just guess an email and receive access to sensitive information.

- A patient's username is the email they used during sign up.

- The patient who is seeking care lives in the United States.

- Some basic security requirements are used for the password.

Additional Details

Timeline

This was a condensed, single-day exercise. It took about 7 hours to complete.

Time	Task
1 hr	Warm up and competitive analysis
45 min	User flow and key information
1 hr	Lo-fi sketches
30 min	Hi-fi mockups: mini design system work
2 hr 30 min	Hi-fi mockups and prototype generation
1 hr 30 min	Writing this document

References

— CityMD landing page (https://www.citymd.com/virtualcare) and registration flow (https://citymdnow.com/)

— Data capture best practices (https://www.healthit.gov/playbook/registrar/chapter-3/)

— List of possible fields for looking up existing patients (http://www.riverscomputers.com/webhelp/Patients/Patient_Lookup.htm)

— One Medical landing page (https://www.onemedical.com) and registration flow (https://members.onemedical.com/pt/registration/register)

— Teladoc registration flow (https://member.teladoc.com/registrations/get_started)

Acknowledgments

The original requirements, constraints, and the invented Health Haven brand were created as an exercise by Kimberly Li, Director of Product Design at Eden Health. Thank you, Kim!