

UX Case Study

Time period 2023

Cigna Dental Claim Form

Web based form design for claim submission



This project was driven by a client-specific goal, and the team was tasked with fulfill the objectives set forth by the stakeholders.

- Conduct a heuristic evaluation of the existing application to identify areas for improvement.
- Map the user journey of the current process to pinpoint areas of friction and frustration.
- Redesign the dental claim paper form into a digital format to streamline the process and enhance user experience.

Introduction

Discovery Phase

During the discovery phase, we collaborated with stakeholders to identify the target users of the application. We conducted user interviews to learn more about their needs, goals, and pain points. We then used this information to create user personas and user journeys, which were detailed descriptions of the different types of users and how they interact with the application. We also performed a heuristic evaluation of the application, which is a usability inspection method that involves identifying potential usability issues.

The information gathered during the discovery phase is essential for designing and developing a user-friendly and effective application. By understanding the target users and their needs, we can ensure that the application is designed to meet their expectations and solve their problems.

Design Process



Discover

Requirement Gathering
User Interview & Ecosystem



Define

Finalize Need Statement
Persona Building



Develop

Ideation, Flow Diagram
Wireframe



Deliver

Visual Design, Prototype
Accessibility

Current application

Heuristic evaluation of the data center application

We conducted a heuristic evaluation of the data center to understand how data is stored there, transitioning from paper/PDF forms. We discovered numerous errors in the forms, with data mismatched to patient records. The claim process is divided into six stages, and if an error is found at any stage, the user needs to fill out the form again.

Claim Search




Icon

Side Menu/Navigation

Consider using different icons (non-search) to represent menu items.

SUGGESTION

Use variety of icons aligned with Cigna brand.

-  Claim
-  Claim Correspondence
-  Image

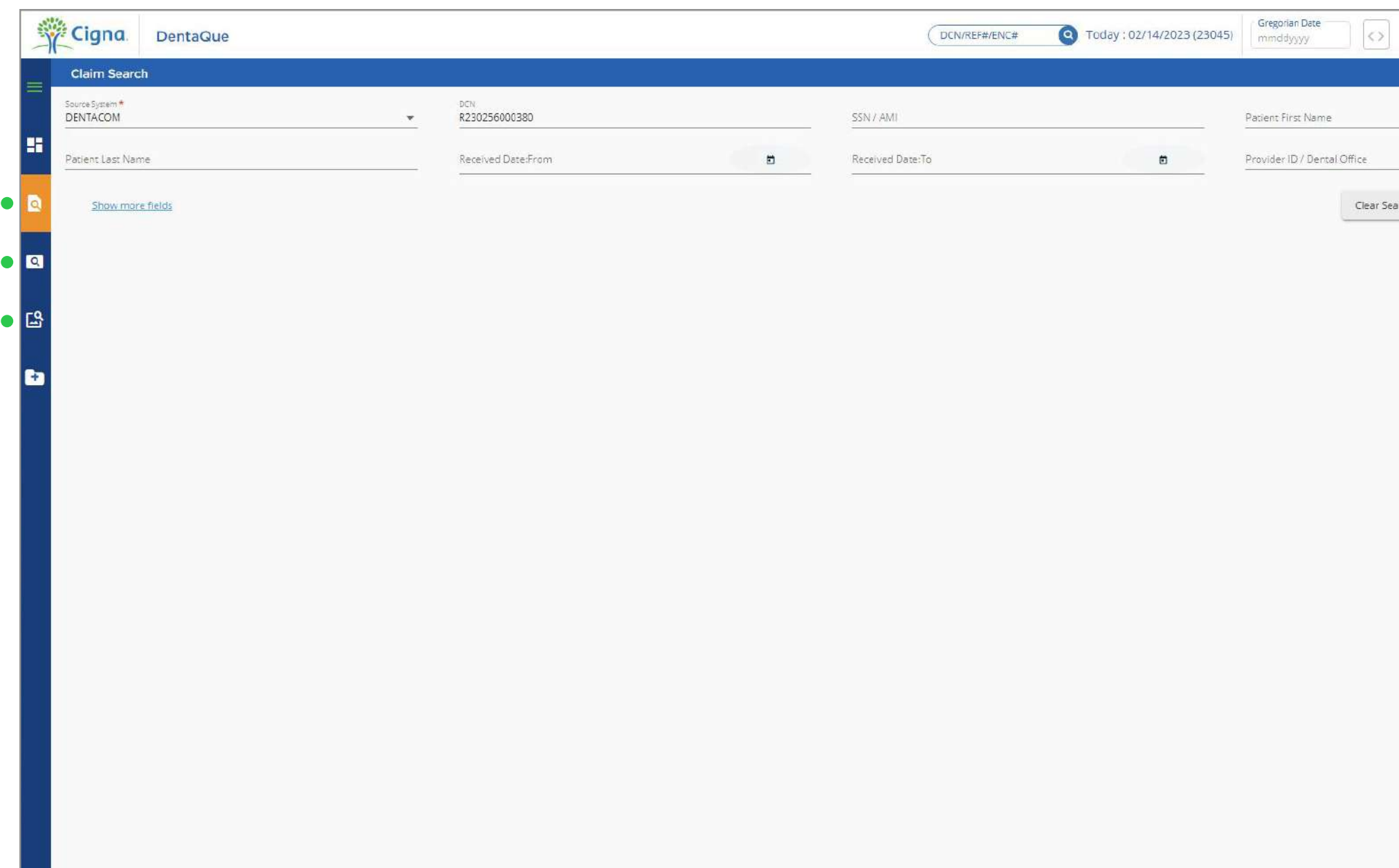
Search Fields

Consider marking required field to focus search effort.

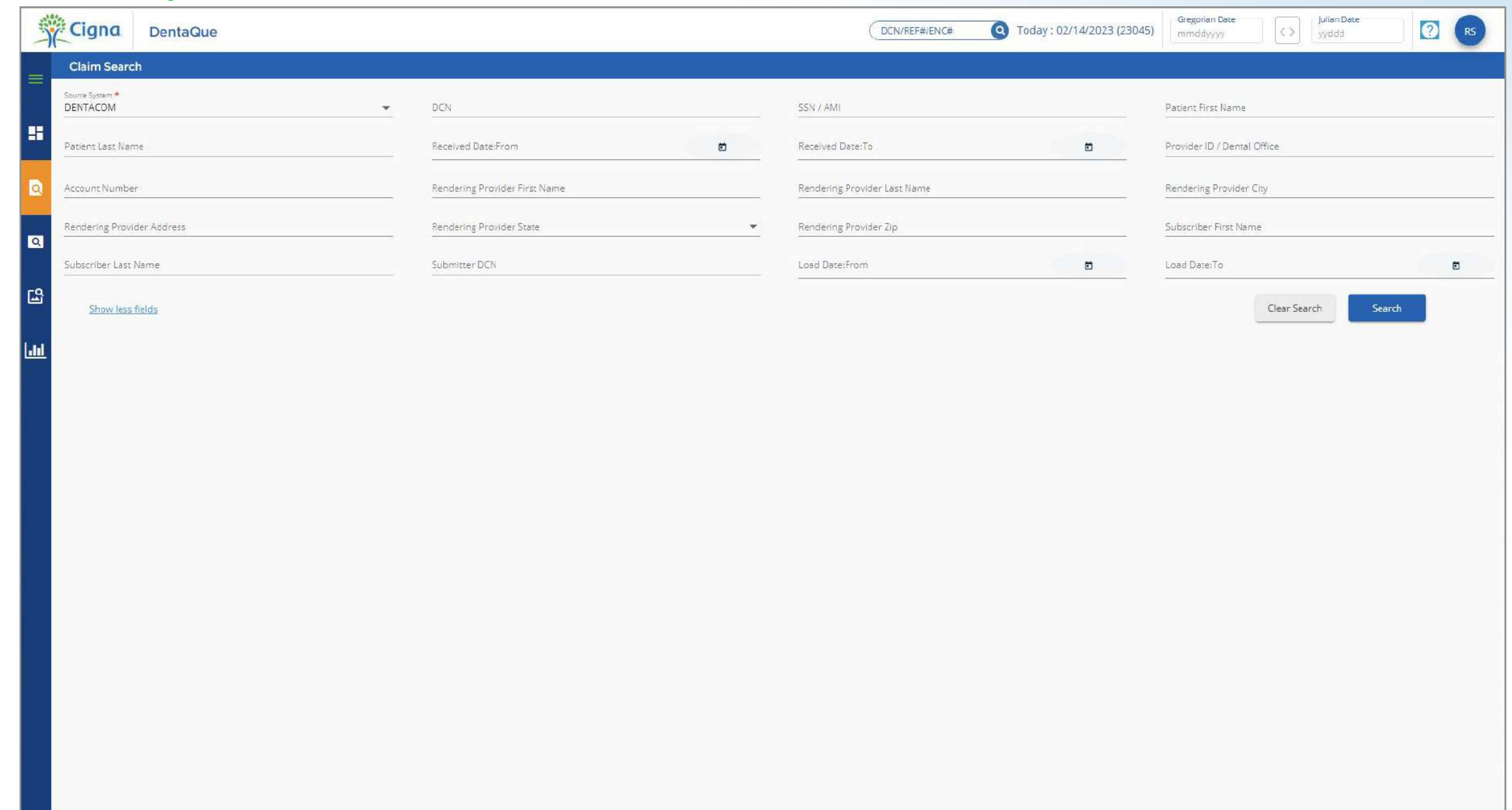
SUGGESTION

Adding asterisk in red for required fields.

DCN *
0200210012020



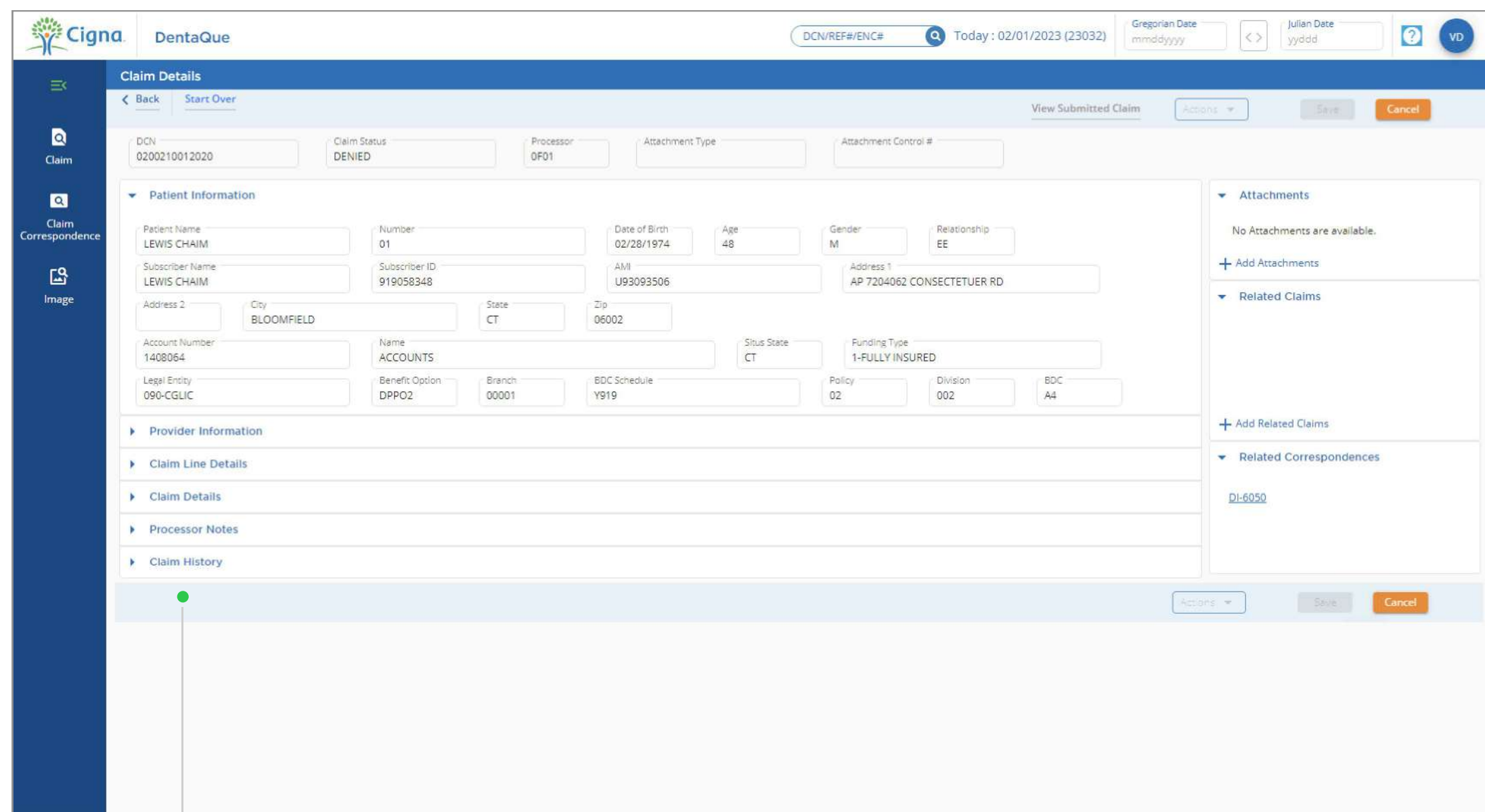
The screenshot shows the 'Claim Search' interface with a side menu on the left. The side menu contains icons for 'Claim', 'Claim Correspondence', and 'Image'. The search fields include 'Source System' (DENTACOM), 'DCN' (R230256000380), 'SSN / AMI', 'Patient First Name', 'Patient Last Name', 'Received Date:From', 'Received Date:To', and 'Provider ID / Dental Office'. A 'Clear Search' button is visible at the bottom right.



The screenshot shows the 'Claim Search' interface with search fields. The 'DCN' field is marked with a red asterisk, indicating it is a required field. The search fields include 'Source System' (DENTACOM), 'DCN', 'SSN / AMI', 'Patient First Name', 'Patient Last Name', 'Received Date:From', 'Received Date:To', 'Provider ID / Dental Office', 'Account Number', 'Rendering Provider First Name', 'Rendering Provider Last Name', 'Rendering Provider City', 'Rendering Provider Address', 'Rendering Provider State', 'Rendering Provider Zip', 'Subscriber First Name', 'Subscriber Last Name', 'Submitter DCN', 'Load Date:From', and 'Load Date:To'. 'Clear Search' and 'Search' buttons are at the bottom right.

Claim Details

Default visibility



Accordions

All information should be visible to speed up viewing.

SUGGESTION

Keep all accordions open in default state, with option to close as needed by user.

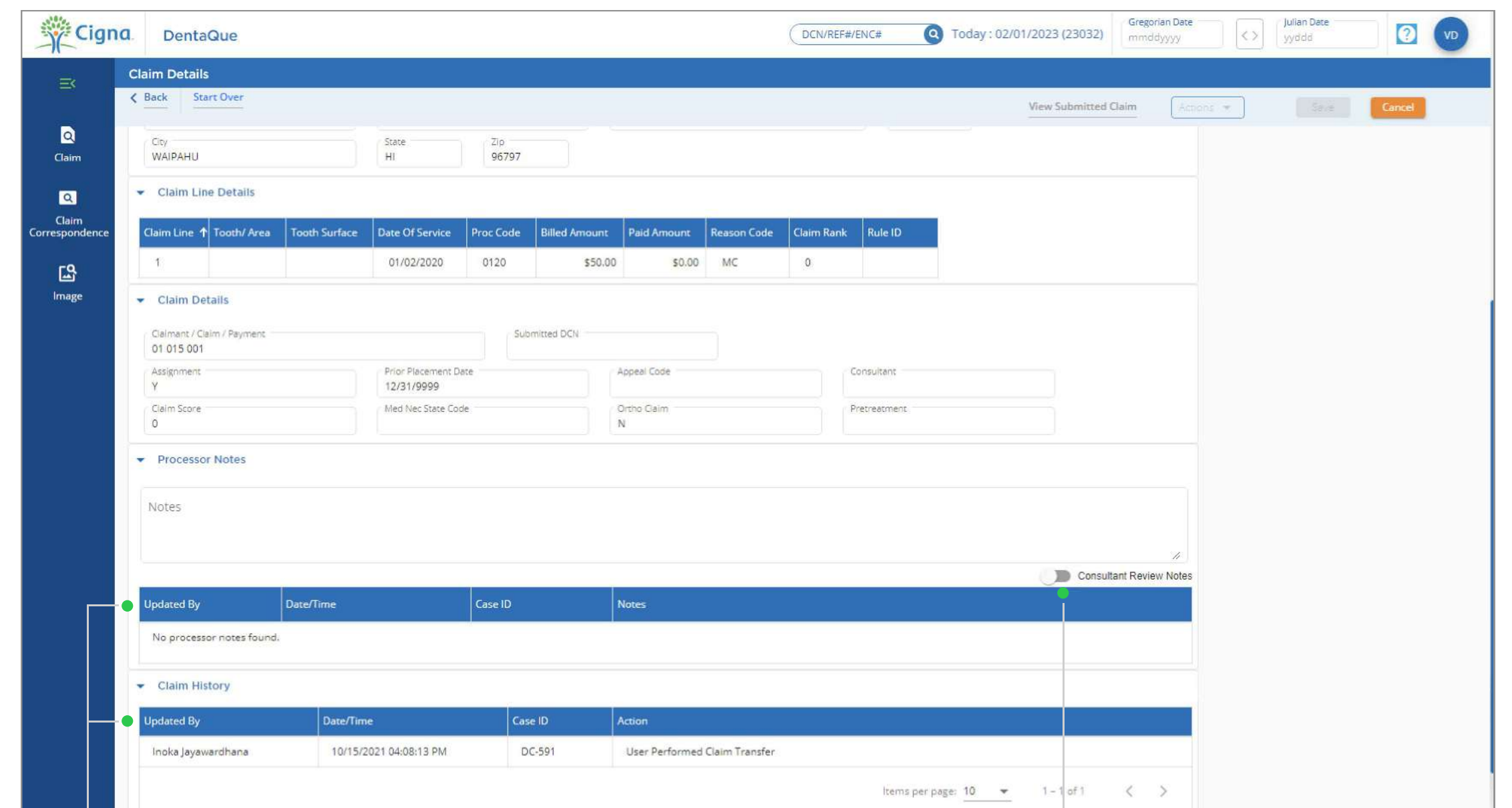


Table alignment

Alignment should be consistent to help reading accurately.

SUGGESTION

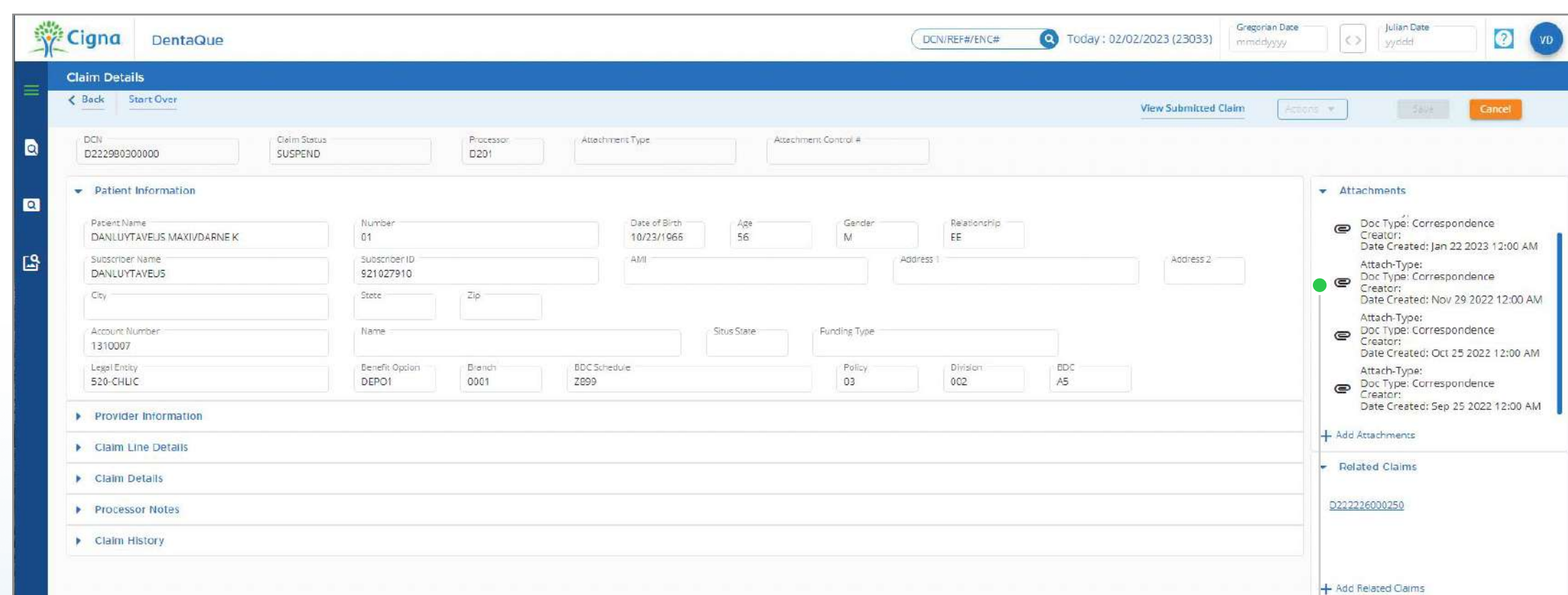
Vertically align table columns.

Toggle

All information should be visible to speed up viewing.

SUGGESTION

Remove toggle to allow Notes to stay visible.

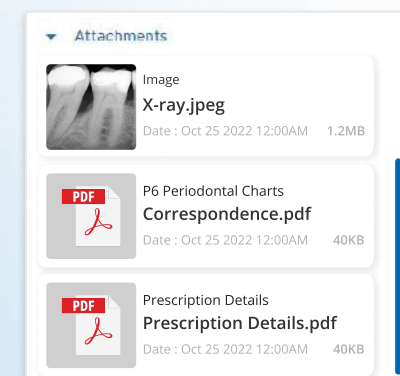


Attachments Detail

Attachments details are not visible on default state, user required to click each link to open and verify.

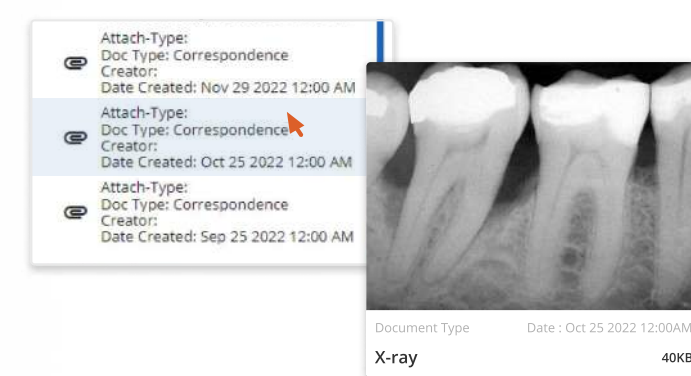
SUGGESTION #1

Each attachment displayed on a single card style, housing more information visible without opening.



SUGGESTION #2

Option 2: Hover state showing row being highlighted, showing image thumbnail.

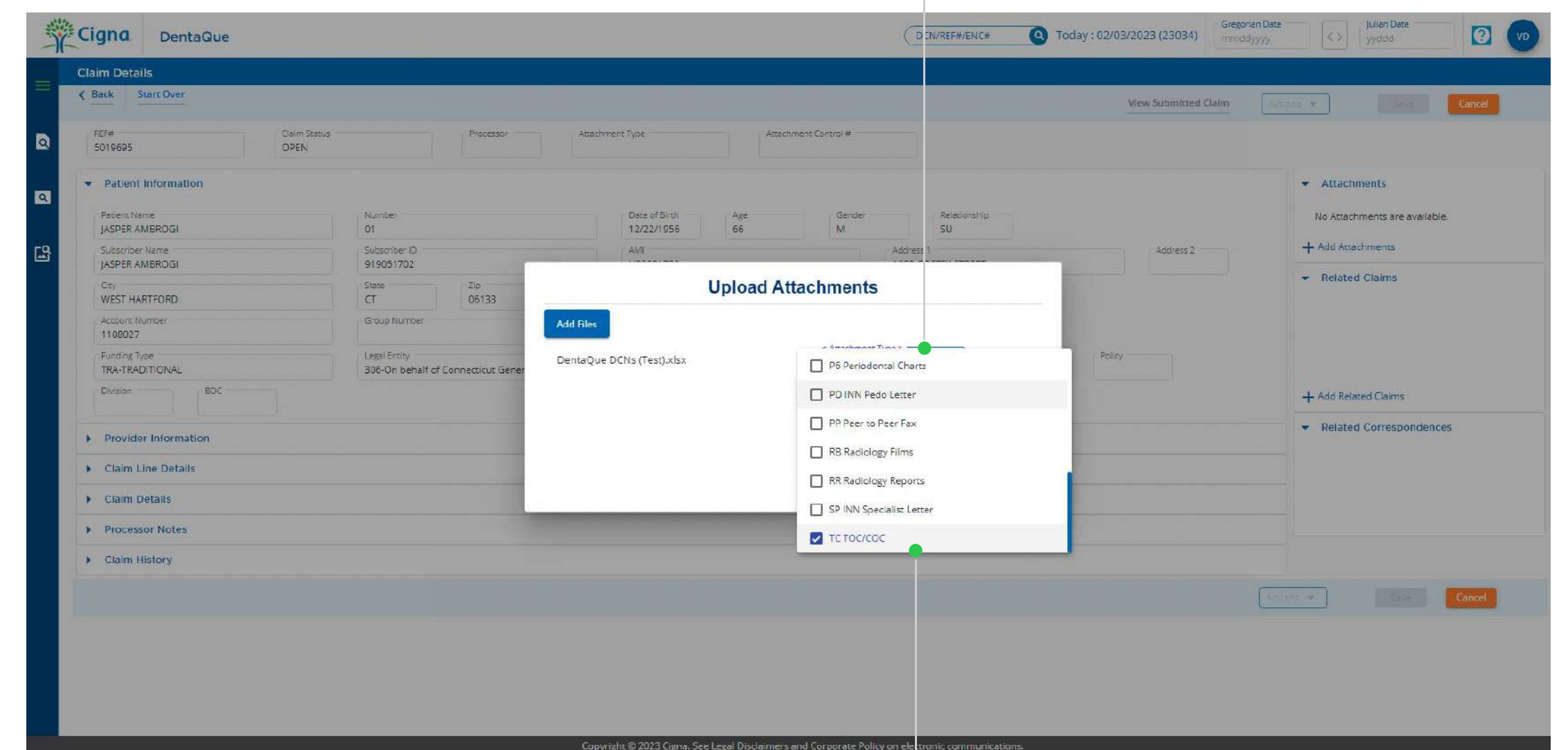
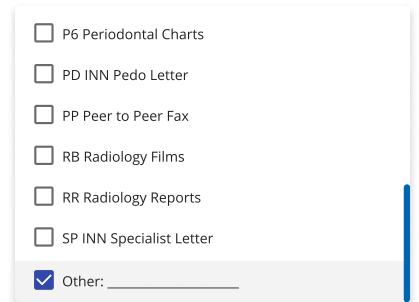


Upload Attachments

There is no option to add custom entry type to attachment.

SUGGESTION

Add "Other" for custom entry type.

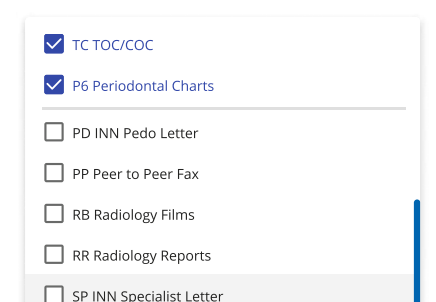


Attachment Type

The dropdown on Attachment type allow user to tag an attachment with multiple "type" entries. The modal size doesn't allow for all type entries to be visible at the same time.

SUGGESTION

The selected attachment type entry(s) should be visible at the top of modal.



Create Claim

Create New Claim

Create Claim

When there is only one item inside a dropdown, considering turning them into a default button in visible state.

SUGGESTION

Adding button like below:

Create Claim

Validate License

To prevent error, Provider License number need to be validated.

SUGGESTION #1

If Provider ID error is a common reoccurrence, there can be added auto-validation function of Provider License number when the claim is loaded by processor.

SUGGESTION #2

If the error are on case-by-case basis, there should be a manual validation function added that can look like a button.

Validate License #

Validated: License # 12345 ✓

Error: License # 12345 ✗

Claim Line	Tooth/Area	Tooth Surface	Date Of Service	Proc Code	Billed Amount	Paid Amount	Reason Code	Claim Rank	Rule ID
1			01/02/2020	0120	\$50.00	\$0.00	MC	0	

Table alignment

Alignment should be consistent to help reading accurately.

SUGGESTION

Vertically align table columns.

Toggle

All information should be visible to speed up viewing.

SUGGESTION

Remove toggle to allow Notes to stay visible.

Case / Claim Created Successfully

Submission confirmation is shown as a disappearing banner on the top right corner.

SUGGESTION

Submission notification should appear as a permanent banner on the page, displaying the reference number for confirmation.

Your Claim has been created successfully!
DCN: R230455200050
Time resolved: 02/14/2023

User Persona

User persona creation to understand user goals and pain points.

Persona



Angela Isaacs

Consultant, Manager

“I am looking for an application that is efficient and quick to help me complete my tasks efficiently.”

🎯 Goals

- All the claim Completion process should be in single screen
- The patient information should be visible on single click.
- There should be preview and edit option for attached document
- All CTA should be properly emphasized

⚠️ Pain Point

- Using multiple screens for checking patient data.
- Data is not matched with the patient
- Multiple search options for patient info.
- No name tagging in the attached document
- Poor X-ray image quality and no image preview.
- Information is not visible in default state
- No Document type.



Kelly A Boswell

BA

“I simply prefer less email engagement.”

🎯 Goals

- She wants the portal to be quick enough to do her things.
- There should be a proper listing of the claim before she proceeds.
- The interaction between mail should be less.
- She wants the information within the portal..

⚠️ Pain Point

- Long waiting time to open and close things.
- Often times before they even start the claim process there will be an invalid provider.
- On Dental Com 2 (DC2), it takes a long time to process the claim.
- She sent N number of claim mail every day.
- She has to run each claim number individually outside the system.

Persona



Leona Reens

Reviewer

“I'd like to simplify my interactions with the system.”

🎯 Goals

- if she can operate the system by using hotkeys.
- If there is a thumbnail preview that would be very helpful.
- If the portal provides the all information in a single click.
- The attached document should be connected with the claim.
- The user/claim history should be connected with DCN Number.
- The code should be recognizable.

⚠️ Pain Point

- Reviewing the form takes too much time.
- Long waiting time to check the attached document.
- To check the claim data she needs to click each section for viewing the data.
- She is not able to complete her task in the given time frame because of too much back and forth.
- Sometimes she needs to add data manually.
- In some cases the documents are missing so she needs to check in the NEA system.
- If she wants to see the user history then she needs to check manually.
- If she needs to change the reason code the system does not recognise the code.



Erica

Ortho, BA

“I want to finish my work efficiently.”

🎯 Goals

- Direct mail is the return correspondence process.
- Reduce the manual process as much as possible.
- Cut down the claim process timing.

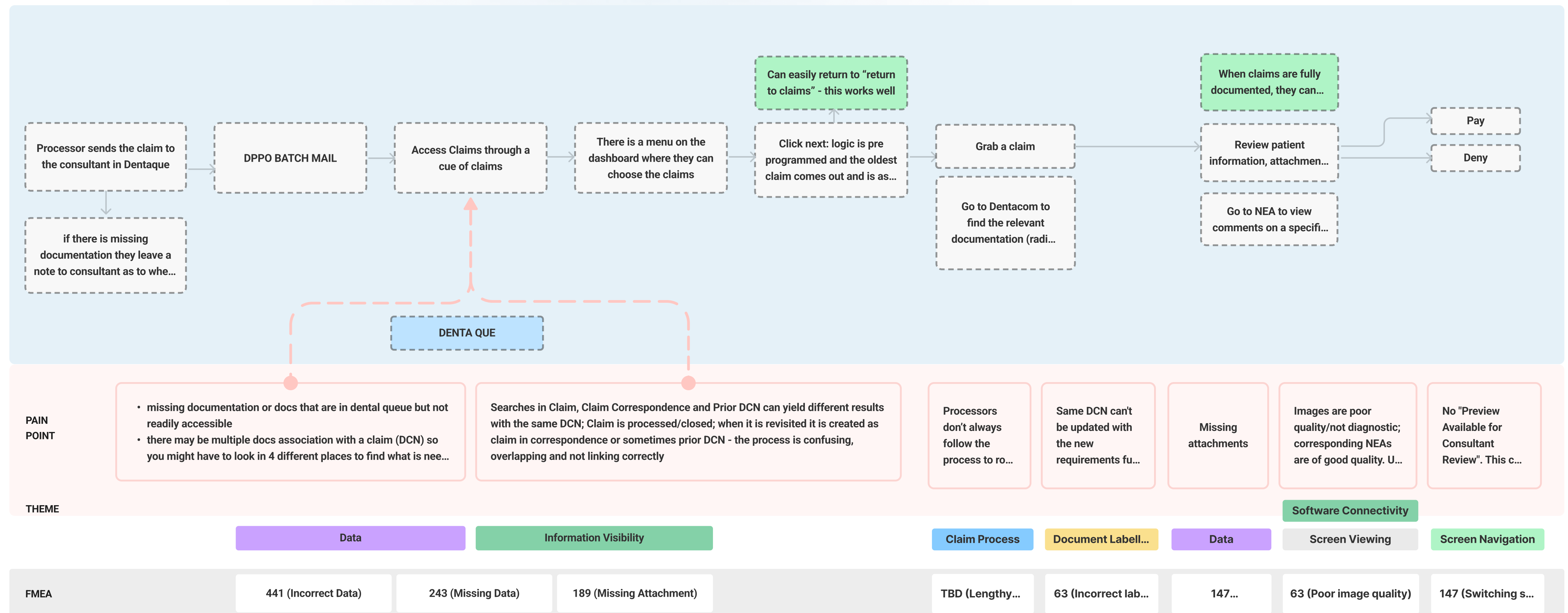
⚠️ Pain Point

- Changing the Code is a very tiring process.
- Calculating pre-treatment estimates is a longer process.
- Disconnected with the information in the pending claim process.
- Manually adjusting the claims, if they are not attached properly.
- Within Cigna, the user often has to send the claim to be whipped due to poor/incorrect data.

User journey

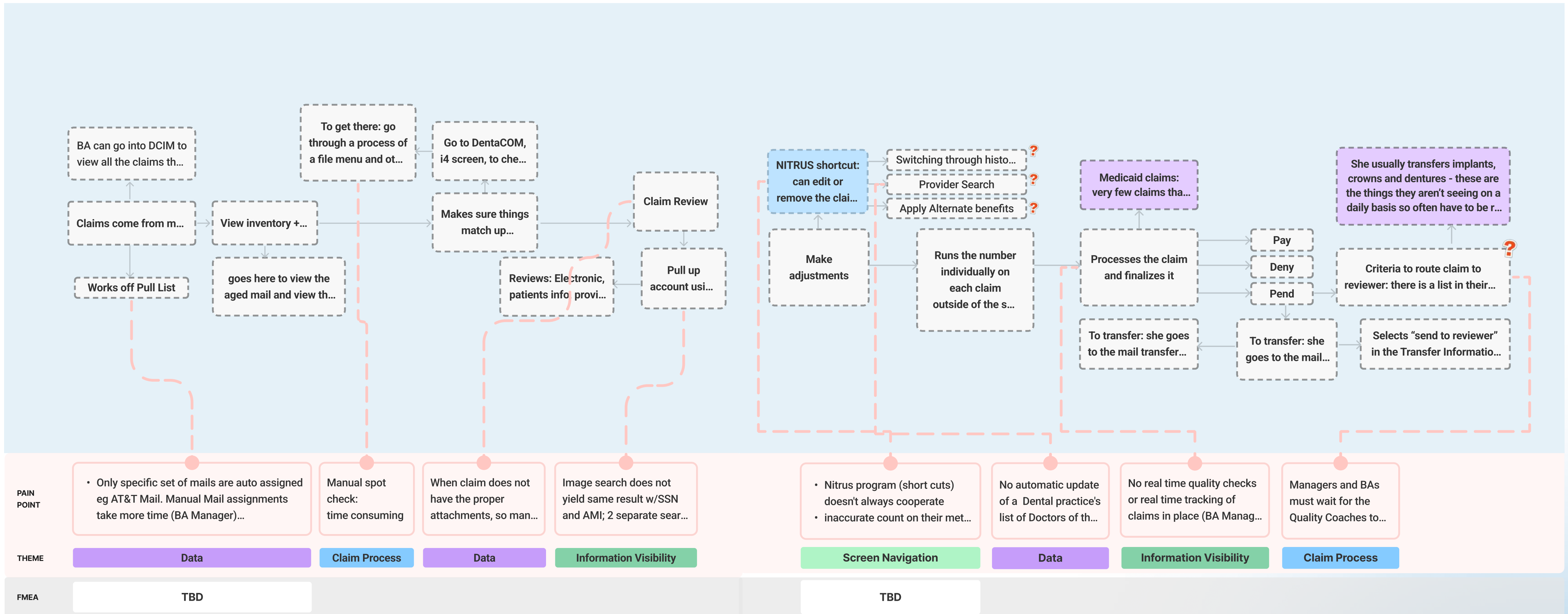
We mapped out all the users' journeys, specifically focusing on the individuals involved in processing the claims. This allowed us to understand each step they take, the challenges they face, and the interactions they have with the system. By doing so, we identified potential areas for improvement and streamlined the entire process for better efficiency and accuracy.

User Journey: Consultant



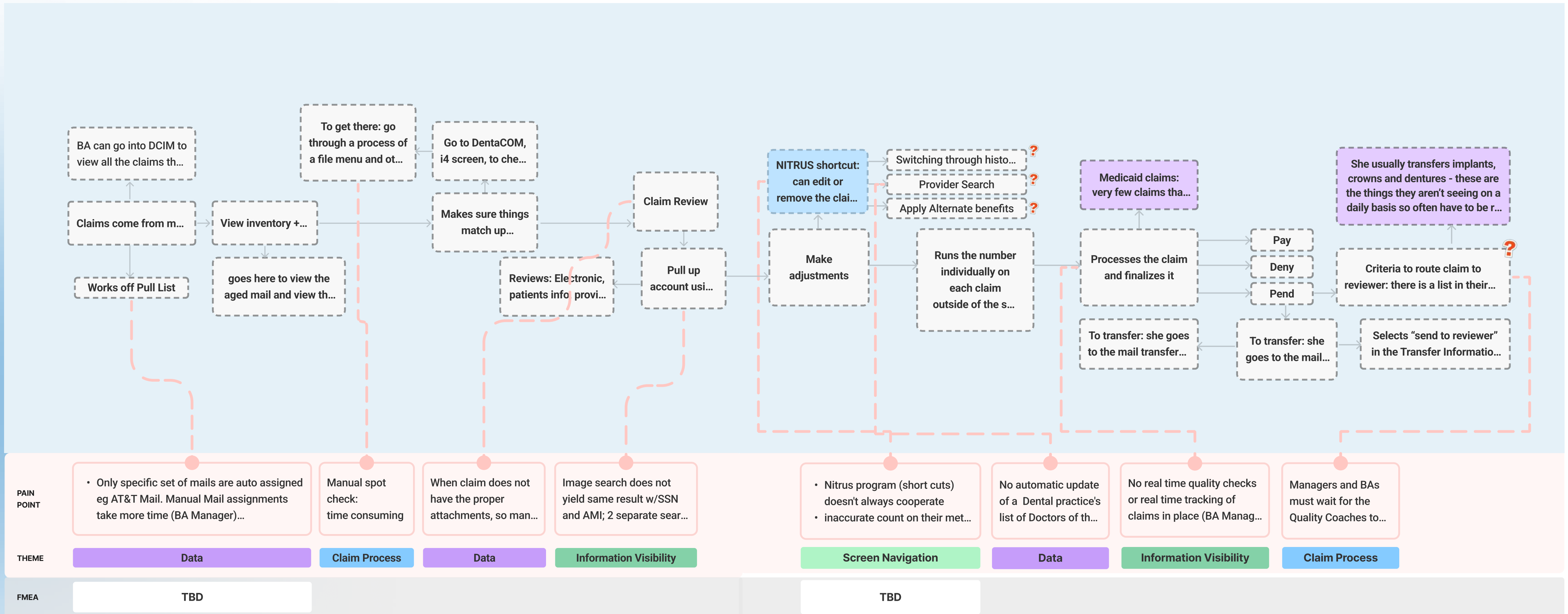
User Journey:

BA / Processor

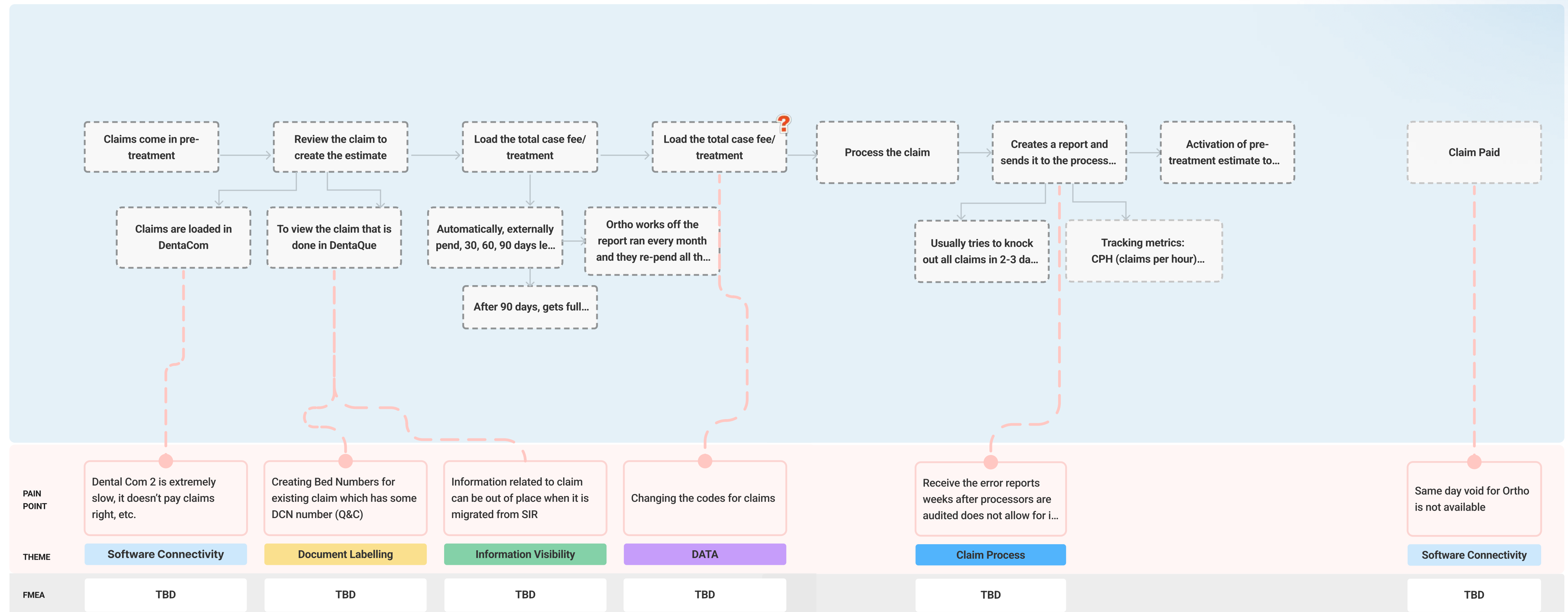


User Journey:

BA / Processor



User Journey: Ortho

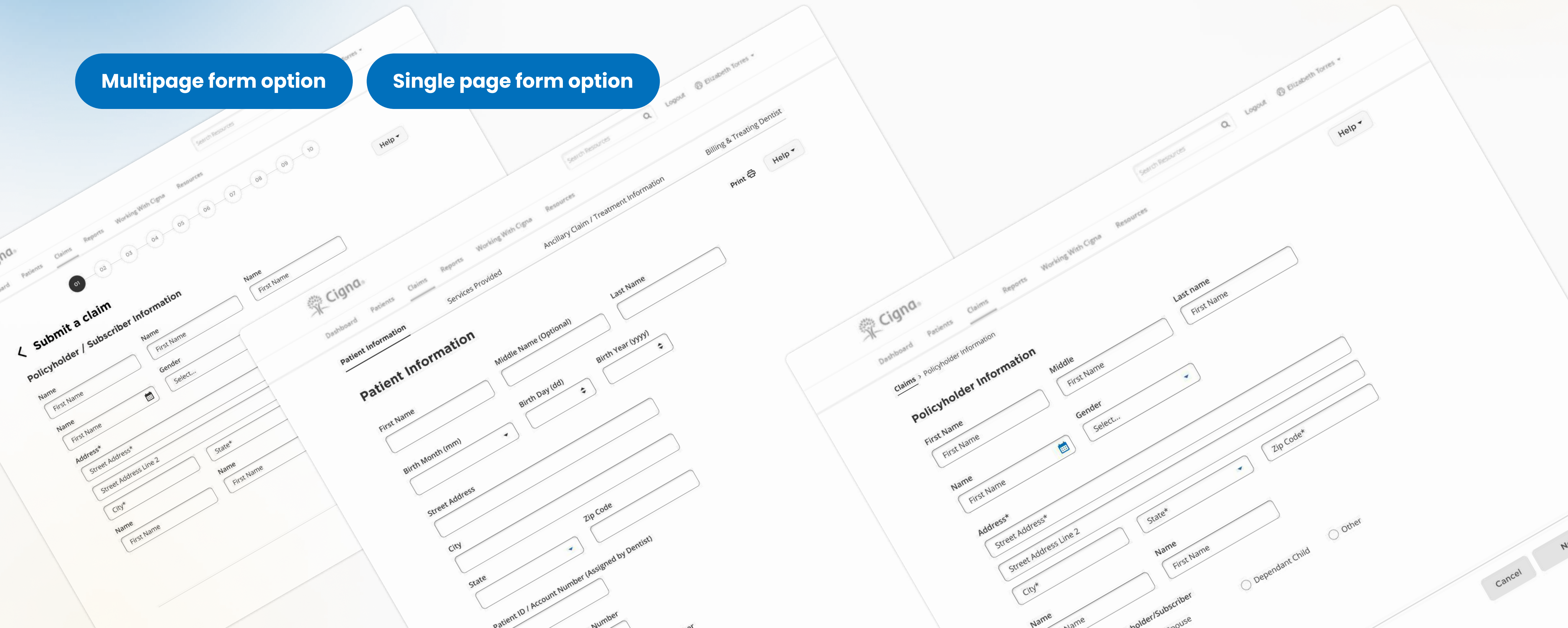


Ideation & Wireframe

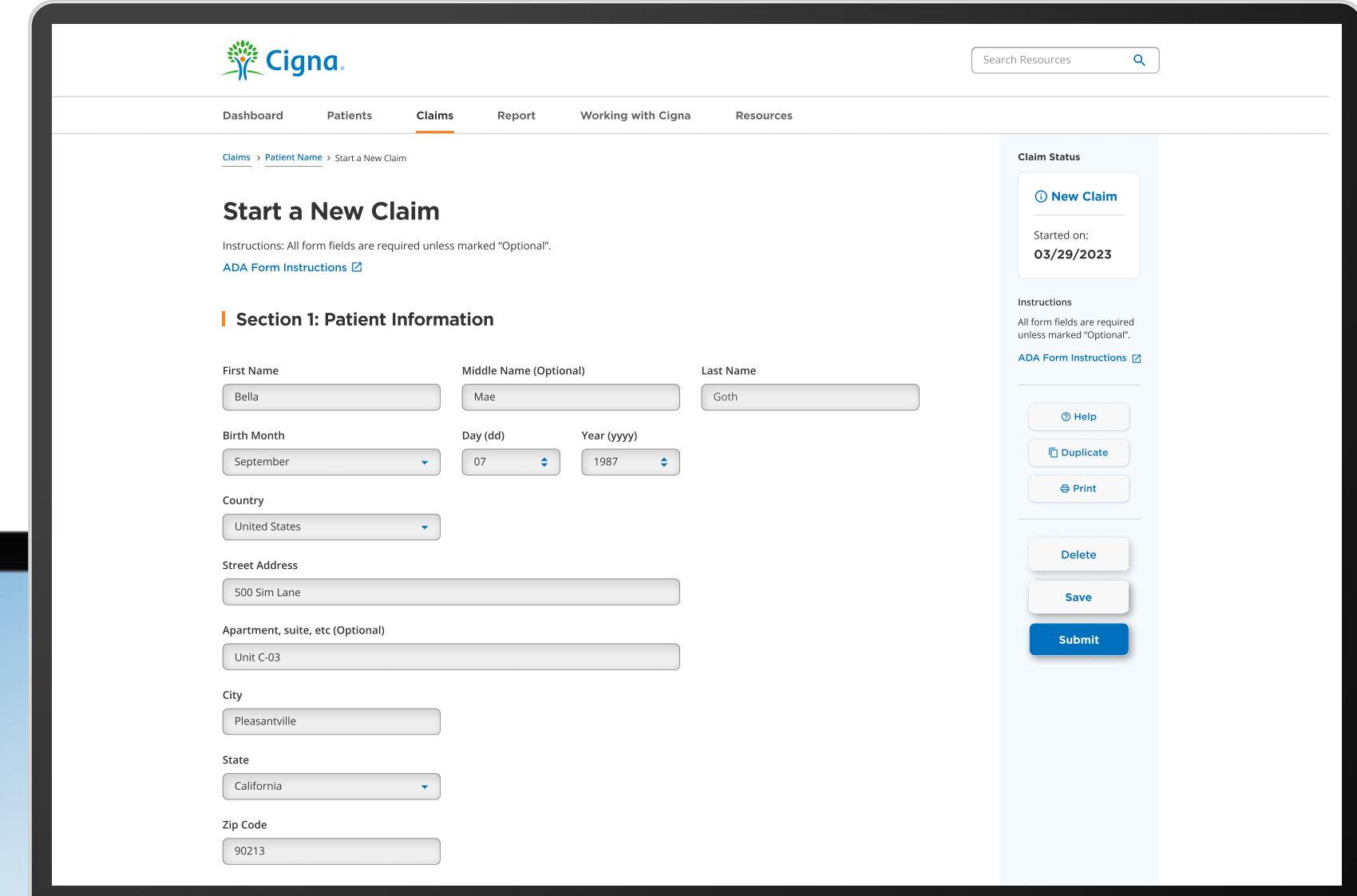
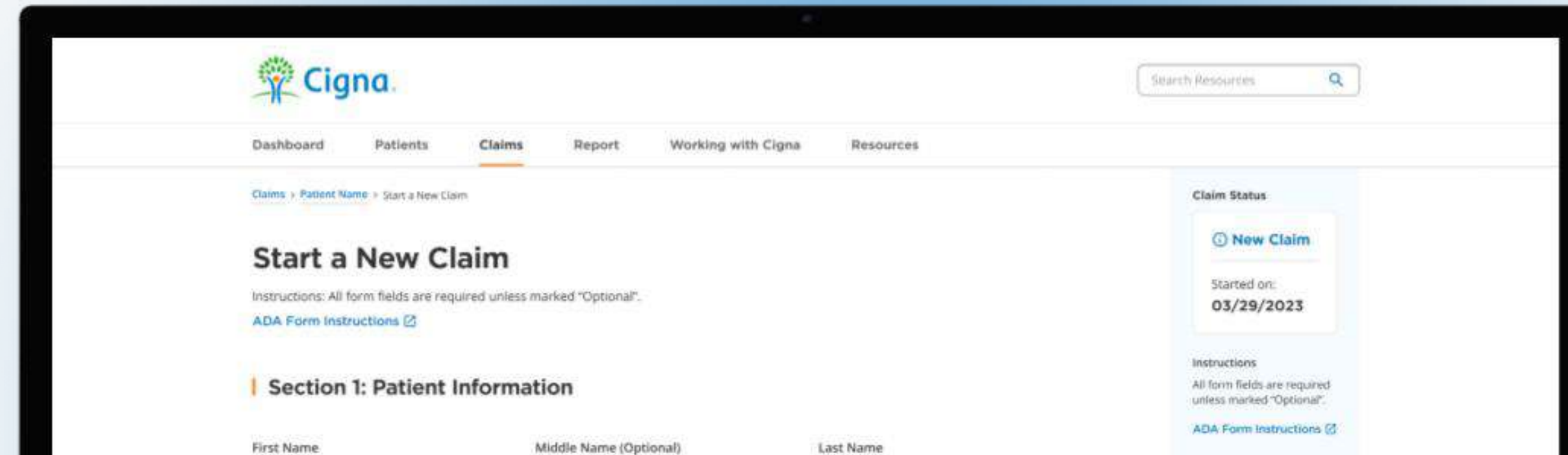
We designed both a multi-page and a single-page form to test which one is more user-friendly for users to fill out the claim form.

Multipage form option

Single page form option



Visual Design



Claim Form

Cigna

Search Resources

Dashboard Patients **Claims** Report Working with Cigna Resources

Claims > Patient Name > Start a New Claim

Start a New Claim

Instructions: All form fields are required unless marked "Optional".
[ADA Form Instructions](#)

Patient Information Services Provided Ancillary Claim / Treatment Information Billing Dentist / Dental Entity Information Treating Dentist Information

Section 1: Patient Information

First Name: Bella Middle Name (Optional): Mae Last Name: Goth

Birth Month: September Day (dd): 07 Year (yyyy): 1987

Country: United States

Street Address: 500 Sim Lane

Apartment, suite, etc (Optional): Unit C-03

City: Pleasantville State: California Zip Code: 90213

Patient ID: U12345678 01

Insurance Plan / Group Number: 7654321

Patient Relationship to Policyholder / Subscriber:
 Self
 Spouse
 Dependents

Claim Status

[New Claim](#)

Started on: **03/29/2023**

Instructions: All form fields are required unless marked "Optional".
[ADA Form Instructions](#)

[Help](#)
[Duplicate](#)
[Print](#)
[Delete](#)
[Save](#)
[Next](#)

If the user doesn't understand something, they can refer to the instruction manual. We also provide information options in specific fields to assist the user directly.

These are the sections of the claim form so the user knows how many sections they need to fill out, which helps reduce cognitive load.

Takeaways

- I worked closely with the concerned team members, engaging them in discussions about their day-to-day challenges with the form. I asked them to share their specific concerns and the difficulties they faced regularly. Additionally, I sought their input on what changes they believed would make their work easier and more efficient. By understanding their needs and incorporating their feedback, we aimed to improve the form and streamline their workflow.
- Provide users with an improved and more intuitive experience for filling out claims easily. This involves streamlining the process, simplifying the interface, and offering clear instructions and support throughout to reduce any potential frustration or confusion.