

TEK Systems - Intelligent Document Processing

# IA and User Flow Final Review

May 22, 2024

## Agenda

**Our goal for today's session is to align on the pages and features that we will need to design for the Sales Prototype.**

**20 min** User Flow Review

**20 min** Review the updated IA and confirm outstanding questions

**05 min** Next Steps

# **User Flow - Medicaid Application & Proof Documents**



# Information Architecture

## IA Goals

**To determine the pages and features within IDP, we will start to buildout the information architecture.**

Once we are aligned on the information architecture we can begin building the user experience and interface for IDP.

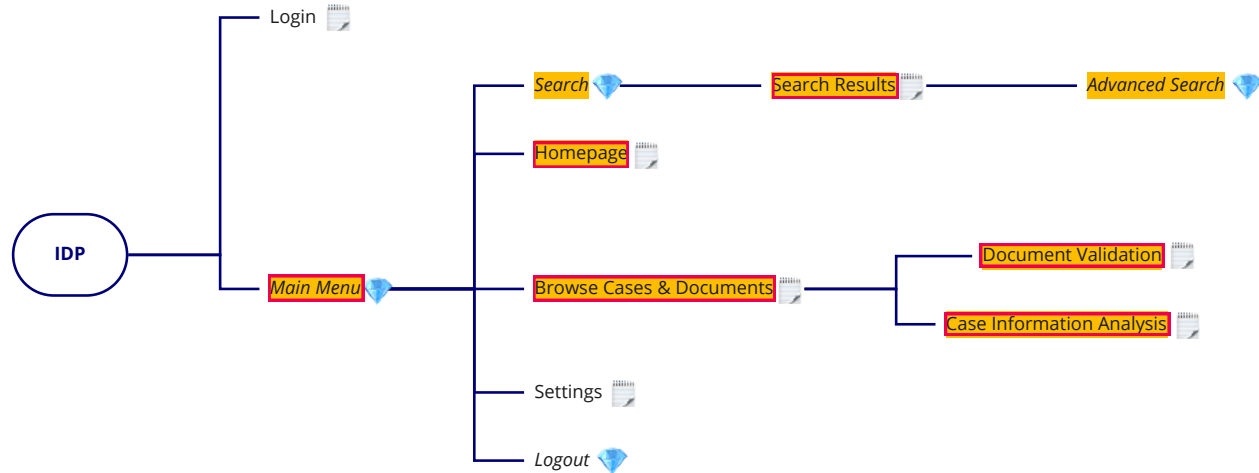
- Information Architecture
  - Page Types
  - Features

***Disclaimer:*** *The Information Architecture, features, and functionalities proposed here are based on our assumptions of the users roles and needs within the IDP.*


## Considerations

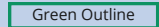
- We're taking an iterative approach to building out the information architecture
- We will continue to make modifications to the product map through working sessions
- We will continue to discuss and align our focus for the Sales Prototype vs MVP
- The UI designs for this phase will focus on the Sales Prototype


## Information Architecture for IDP



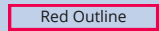
### Key

 = Feature

 = Approved

 = Focus for Sales Prototype

 = Page Type

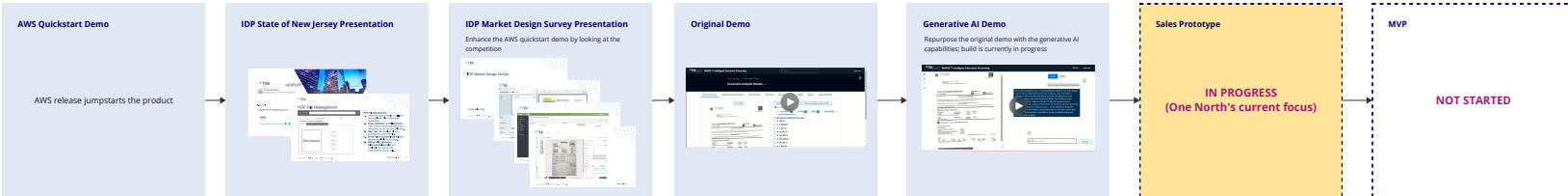
 = Needs Approval



# Appendix

# Recap

## Timeline of the materials



**Our process & deliverables for the Sales Prototype**

Throughout our process and the creation of these deliverables, our goal has been to capture and understand pain points, requirements, and big ideas so that we can prioritize what will makeup the Sales Prototype.



- Informed by:**
- Original Demo
  - GenAI Demo
  - Discussions with TEK stakeholders

- Informed by:**
- Discussions with TEK stakeholders

- Informed by:**
- Discussions with TEK stakeholders

- Informed by:**
- Discussions with TEK stakeholders

- Informed by:**
- Discussions with TEK stakeholders

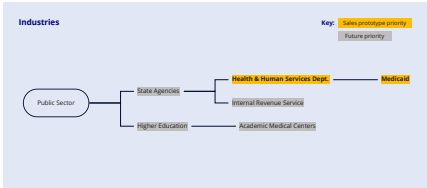
- Informed by:**
- Original Demo
  - GenAI Demo
  - Market Design Survey
  - Discussions with TEK stakeholders

- Informed by:**
- Michael's user flow, informed by feedback from Heidi
  - Discussions with TEK stakeholders

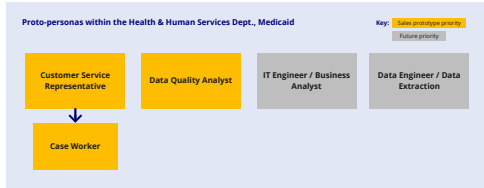
- Informed by:**
- Original Demo
  - GenAI Demo
  - Market Design Survey
  - Medicaid Application Form
  - List of Proof Documents
  - Discussions with TEK stakeholders

# **Top Priorities for the Sales Prototype**

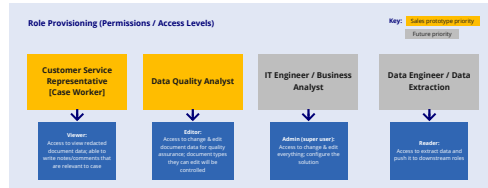
Top Priorities



Industry focus for the Sales prototype (1): Health & Human Services Dept., Medicaid ✔



Proto-persona focus for the Sales prototype (2): Customer Service Representative [Case Worker], Data Quality Analyst ✔



Role provisions focus for the Sales prototype (2): Viewer, Editor ✔

**What will IDP accomplish for the Case Worker?**

**Goal #1**  
Eliminate manual entry of applications and proof documents by automatically processing data from documents into the digital format

**Goal #2**  
Assist with decision making on a case by analyzing information across a policy and eligibility knowledge base to help the case worker make an informed decision