Product Management Internship @ Verana Health

Technology Innovation Concentration

Experiential Component

Norman A. Toro Vega - December 21, 2020

Verana Health is a San Francisco-based startup focused on leveraging clinical databases in medicine to provide powerful analytics and quality reporting applications to providers.

🏥⛑️👨‍⚕️👨‍⚕️👩‍⚕️

10 Things I Learned at Verana Health!

1. Understanding Users
2. Ideation + Requirements
3. Roadmapping
4. Stakeholder Convos
5. Product Design
6. Technical Design
7. Agile Sprint Planning
8. Cross-Team Collaboration
9. How to Pivot!
10. Life at a Startup

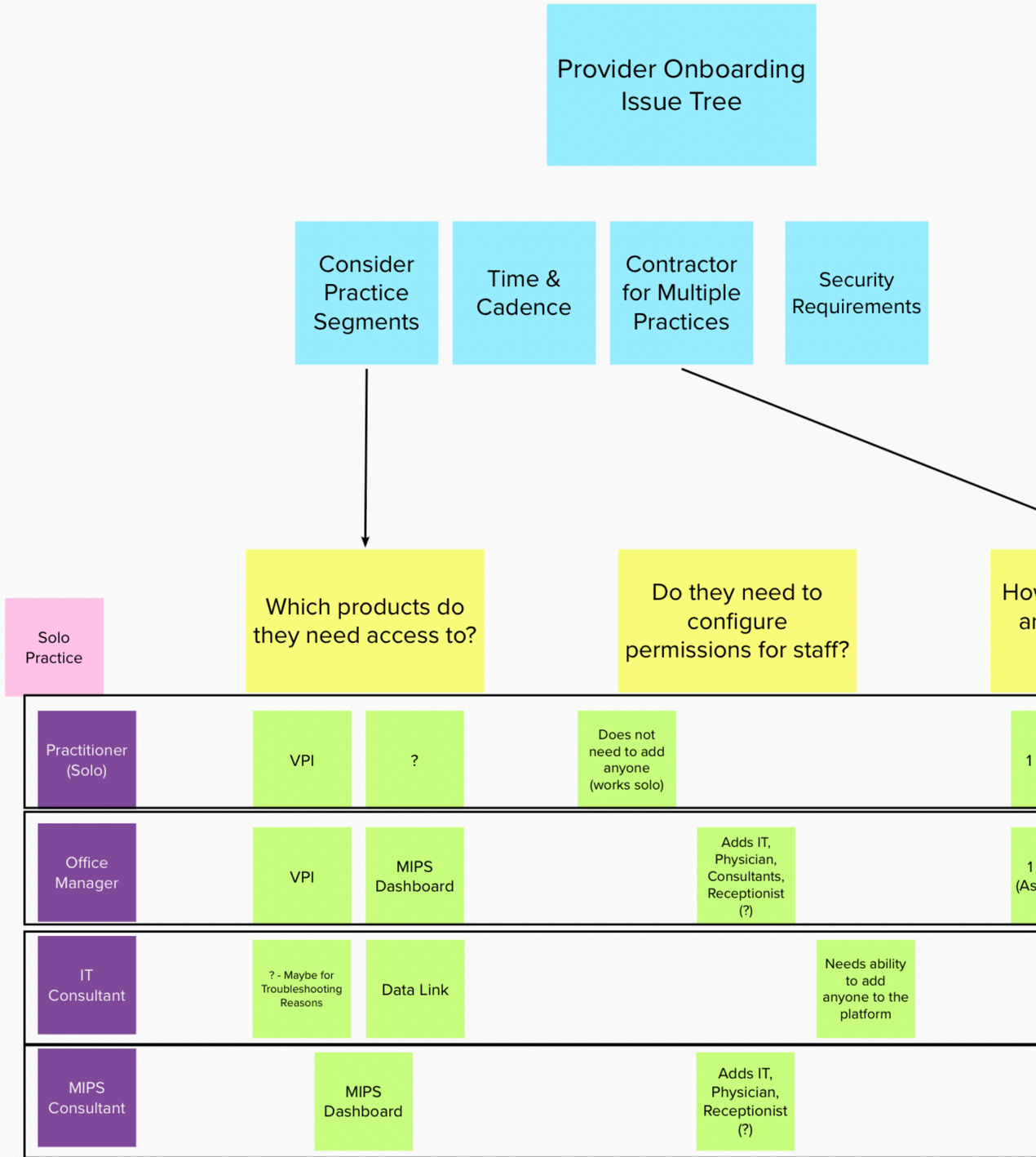
The Task

Creating a single gateway for all types of users to authenticate and access their applications.

User Needs + Ideation

Catering to a Diverse Set of Users

- Physicians, Research Coordinators, and Practice Admins
- A Diverse Set of Applications (MIPS, Trial Connect, Data Link, Support Center, and Practice Insights)
- Multiple User Accounts (Okta, Society SSO, Salesforce, etc.)



Requirements Gathering

Documenting Essentials, Nice-To-Haves, and Wish-To-Haves

Spaces People Apps Templates **Create** Search

Requirements

Login Navigation

- Must be accessible on desktop and mobile
- Navigation for first-time users creating a New Account
- Navigation for existing users with Verana Accounts
- Navigation for existing users with AAO/AAN Credentials
- Navigation for users working in multiple practices and those who carry different roles

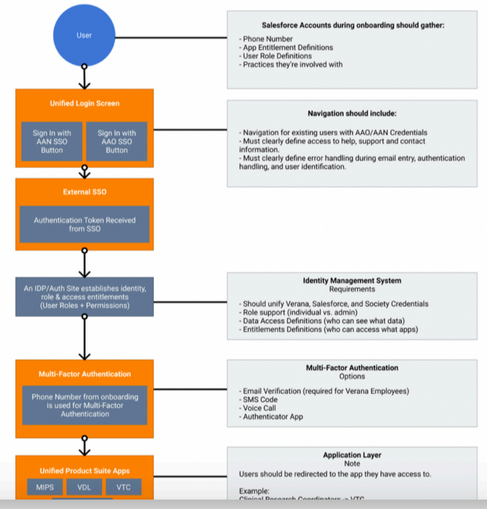
Technical Considerations

- **New Account Activation**
  - Users will be able to sign in with their accounts through the Unified Login (AAO, AAN, Salesforce, Okta) after filling out some additional information fields (Phone Number, Secondary Email) for the Two-Factor Authentication step.
- **Federated Authentication:**
  - Sign in with AAO Credentials (For Physicians, Practice Admins, and Registry Users)
  - Sign in with AAN Credentials (For Physicians, Practice Admins, and Registry Users)
  - Support for Verana Accounts (For Clinical Research Coordinators and IT Managers who don't have AAO/AAN Credentials)
  - Accounts should be integrated with Salesforce, with the possibility of singing in with their Salesforce information.
- **Identity Management System with Identity Provider (IDP) features:**
  - **Accounts Integration**
    - A user's account should be composed of their Verana Credentials, Salesforce Information, and Society Credentials through their practice email
  - **Role support with entitlements definitions**
    - Individual: have access to specific apps (i.e. Physician with access to MIPS)

Spaces People Apps Templates **Create** Search

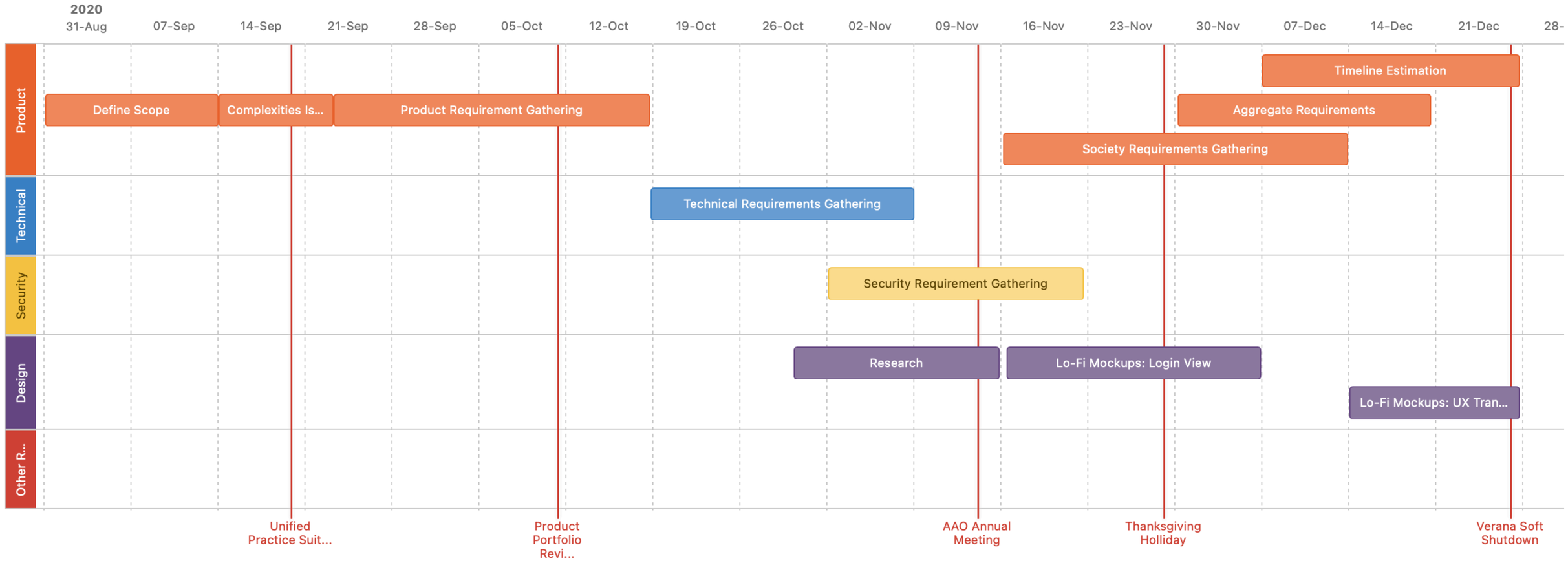
Phase 1 → By mid-Q1

- **Society SSO Login -** Ability for users with society accounts (AAO/AAN) to sign in with their society credentials using SSO or Federated Authentication.
- **Accounts Integration -** During onboarding, user identities should be tied between Salesforce and Society Accounts through their Society Member ID to handle user roles, entitlements, and credential provider information (states which log-in site they use based on their email, i.e. AAO, AAN, Salesforce, Okta). Okta will tie all of these data points together and provide a seamless experience for any user.
- **Two Factor Authentication -** After authenticating, they should go through a Two-Factor authentication step as an additional security step through SMS, email verification, or an authenticator app.



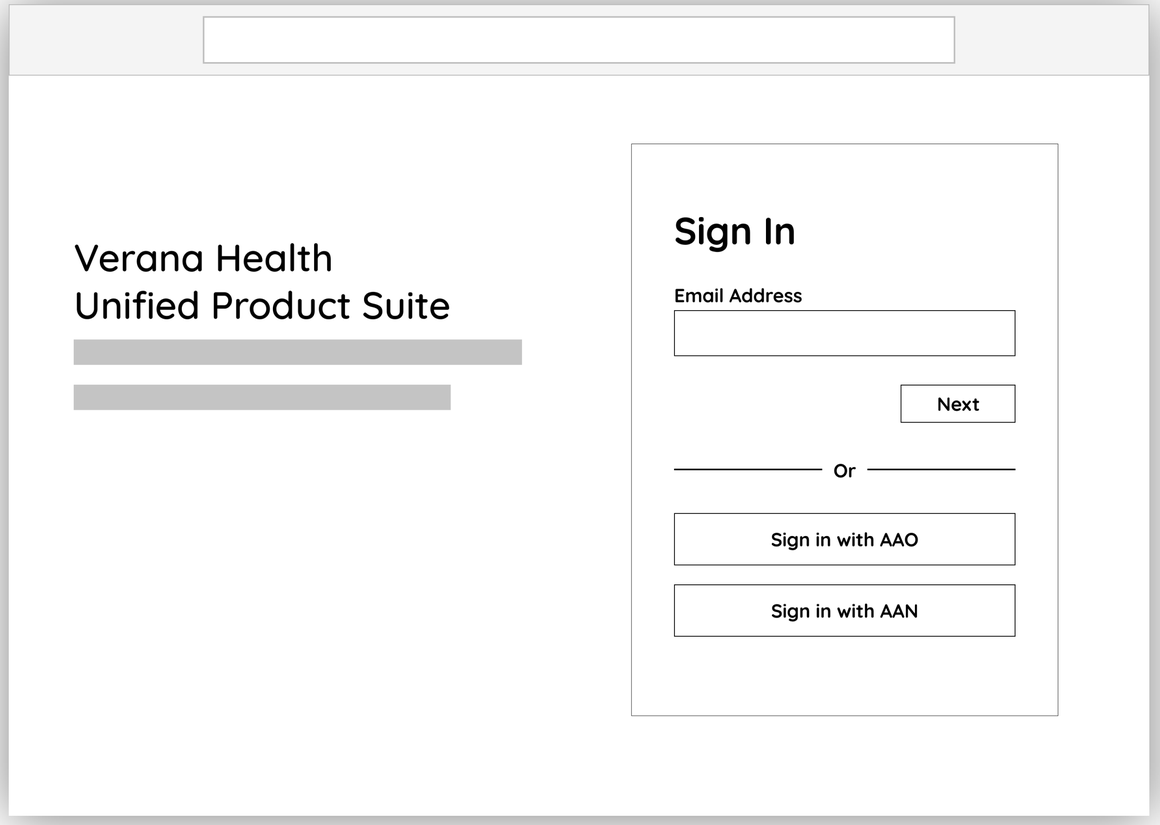
Roadmapping

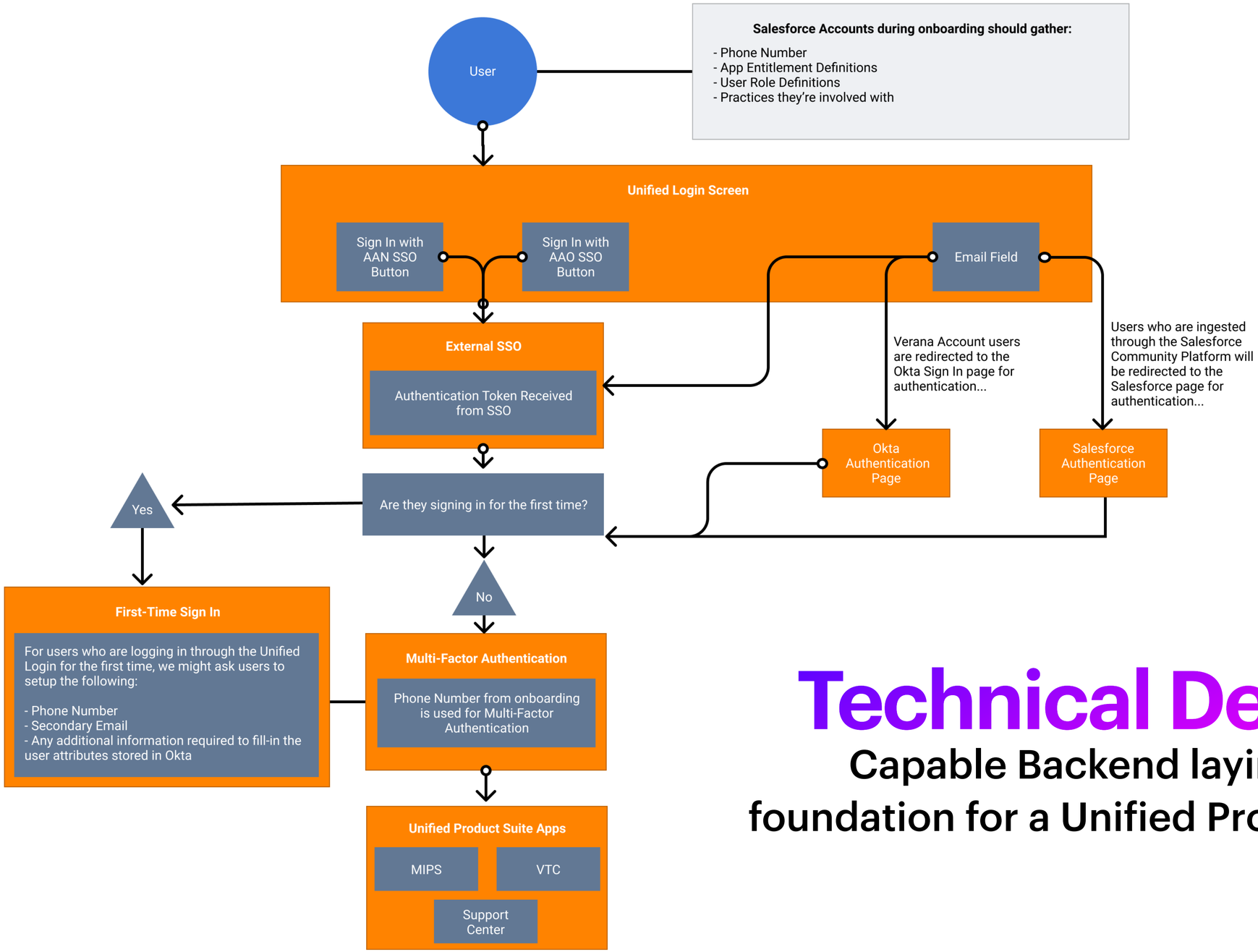
Planning with Stakeholders & the Data Apps Team



Product Design

Simple, Seamless, and Secure





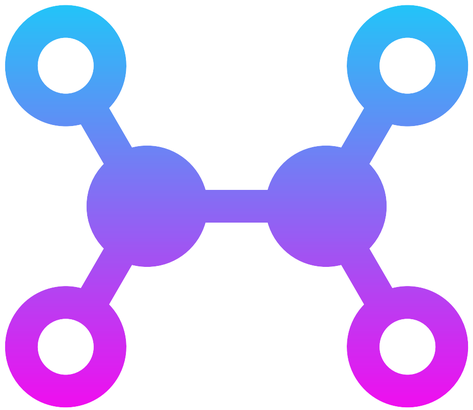
Technical Design

Capable Backend laying the foundation for a Unified Product Suite!

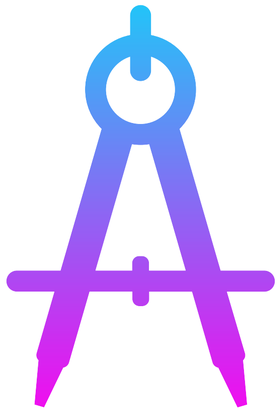
Agile Team Collaboration

Getting Stuff Done in a Startup Environment 🙂

Product



Tech



Design

Practice
Experience

Product Management Internship @ Verana Health

Technology Innovation Concentration

Experiential Component

Norman A. Toro Vega - December 21, 2020