

# Colin — UX Research Case Study

Secure Partner Portal for Primary Care Coalition

Project Manager & UX Researcher · UMD HCI Capstone (iConsultancy) · Sept 2025 – May 2026 · 5-person team

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## OVERVIEW

The Primary Care Coalition, a Montgomery County, MD nonprofit connecting residents to healthcare and social services, relied on email and manual file-sharing to exchange sensitive partner data — creating compliance risk and slowing down day-to-day coordination with program partners. Our team was tasked with designing a secure, self-service partner portal on Microsoft SharePoint to replace this workflow.

## PROBLEM

Two recurring personas surfaced in research: staff sharing files ad hoc with no audit trail, and staff distributing reports with no visibility into who had the latest version. Both pointed to the same root issue — there was no centralized, permission-controlled space for partner data, which put PHI/PII at risk and added friction to routine handoffs.

## MY ROLE

- Led project management — sprint scheduling, Trello board, client coordination, and standups across five sprints
- Led stakeholder interview recruitment and facilitation with PCC staff
- Led affinity mapping to synthesize research into actionable themes
- Co-developed user personas and laid out initial wireframes

## PROCESS

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|---------------------------------|---|
| <b>Research &amp; Discovery</b> | Stakeholder interviews, competitive analysis, and affinity mapping to define pain points and surface security as the top-priority theme.      |
| <b>Ideation &amp; IA</b>        | Translated findings into an information architecture for the portal, prioritizing permission-based access and a clear file-sharing structure. |
| <b>Prototyping</b>              | Built a mid-fidelity SharePoint prototype reflecting the new structure, reviewed iteratively with the client.                                 |
| <b>Testing &amp; Validation</b> | Usability testing sessions with staff validated the new workflow against the old email-based process before final handoff.                    |

## OUTCOME

Delivered a validated SharePoint partner portal design and final handoff to PCC in May 2026, replacing an ad hoc, email-based workflow with a centralized, permission-controlled system for sharing sensitive partner data — reducing compliance risk and streamlining day-to-day coordination between PCC and its program partners.

## TOOLS & METHODS

Stakeholder Interviews · Affinity Mapping · Competitive Analysis · Information Architecture · SharePoint Prototyping · Usability Testing · Trello

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Full case study with research artifacts, wireframes, and testing notes available on request.