PAYCHEX

Health & Benefits

CASE STUDY

by Adrian Dulgheru

Project context & goals

Health & Benefits website was over 10 years old. The product owners wanted to redesign the enrolling process and overall look of the website.

The redesign process was driven by the customers complains not being able to complete the enrolllment process without the help of CS team.

In short the project goal was to simplify and present a better experience to the users that would achieve over 90% completion rate of enrollment.

Other goals:

- Easy to use with minimal cognitive load
- Ability to self-service data entry with ease
- Allowing data editing
- Friendly user language
- Improved enrollment steps process
- Design a quick user onboarding

Customer problems

The legacy website was dated. The interactions were heavy and along the process the customers had to reach CS team over the phone to request help.

General problems:

- Heavy page content that made the user leave the process
- Pop-ups during the enrollment process were not browser friendly
- Lack of consistent language and guidance
- Heavy page loading
- Inability to edit data without CS help
- Low usage of website and high user drop-off during the process
- Inconsistent and missing error notifcations on some pages

Team, roles & stakeholders

The ITX design team was composed of 3 product designers (Adrian, William & Christy) while the Paychex team had a team of 5 designers. Engineering team was based in US.

- Research competitors and relevant applications (Expensify, Expensewire, Turbotax & Benetrac)
- Customers, CS team and stakeholders contextual interviews
- Wireframing and visual design

The ITX design team collaborated closely with Paychex design team and product owners in weekly calls or in-house meetings at their offices.

Discovery & research

In the discovery phase, the design team has:

- Gathered feedback from internal team (CS, product management) and customers
- Reviewed similar applications and competitors
- Discussed the visual design language and UI approach

Design process & solutions

The design phase was started by understanding the user journey and trying to simplify the enrollment steps.

Instead of designing a new design system, the Paychex team decided to use the google design system instead.

In the early stages, the design team had presented low fidelity prototypes and A/B tested a couple of versions to better visualize the final product.

Additional feedback came from the CS team and customers interviews that were facilitated by a third party company.

The design team was reviewing along with Q&A the design implementation and tracked the bugs / visual issues in JIRA.

Outcomes & tracking

Overall the new enrollment process redesign was a success. The team has received positive feedback from customers during the development process.

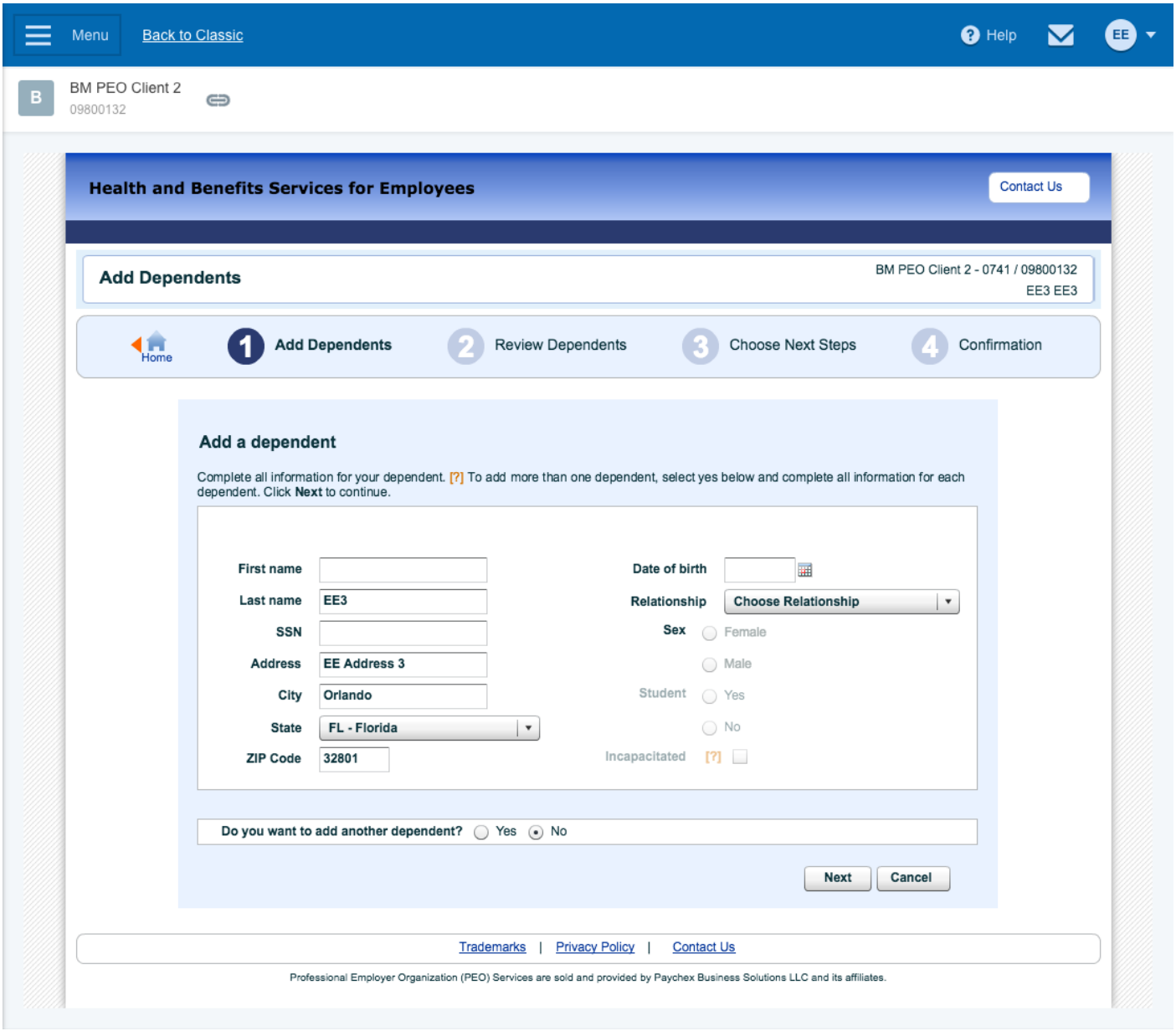
The feedback was received during contextual interviews where the users were asked to perform real life examples while using a high-fidelity prototype.

Lessons learned

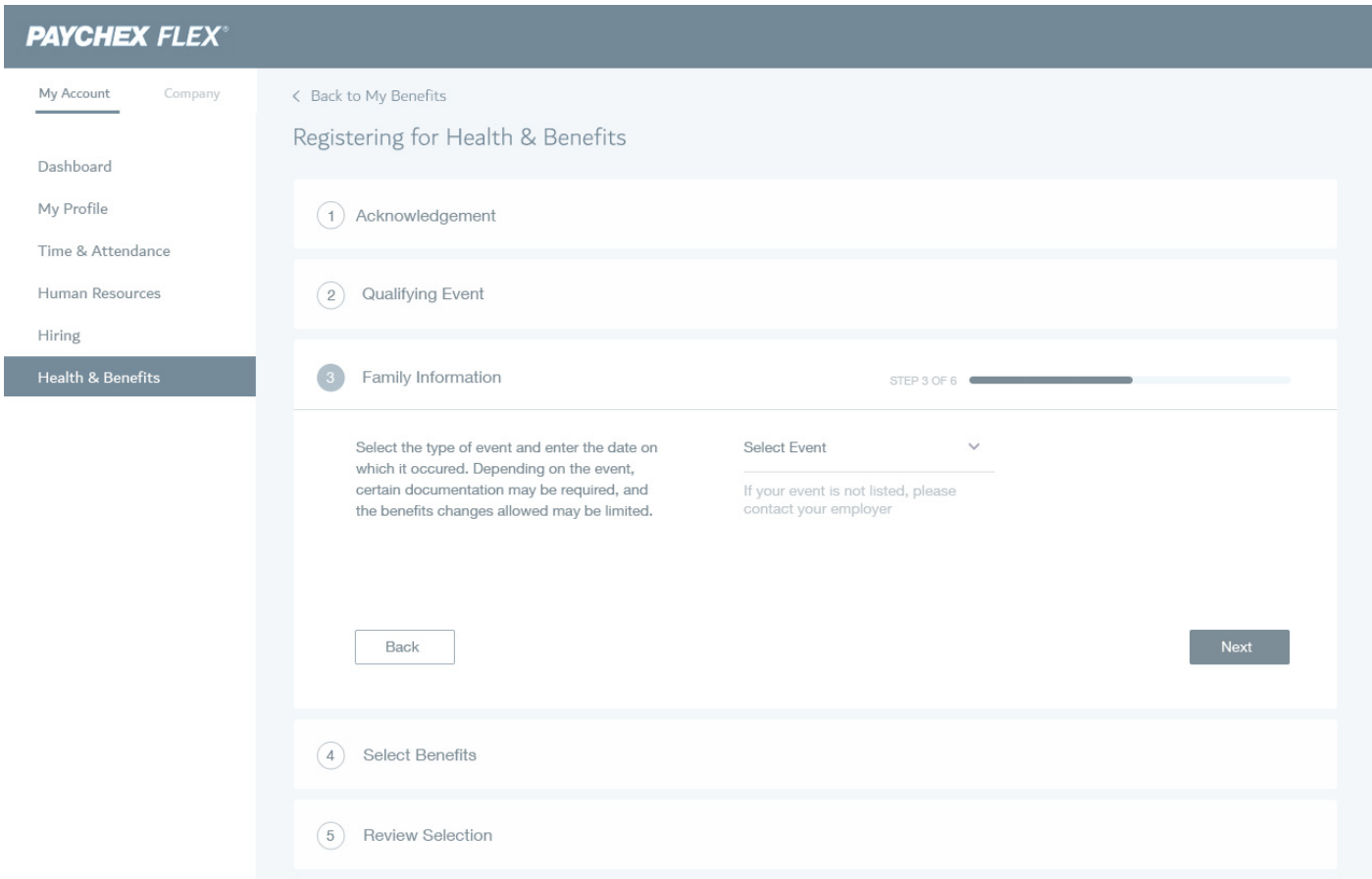
Understanding the user pain points from the CS team was a key factor in designing the new H&B application.

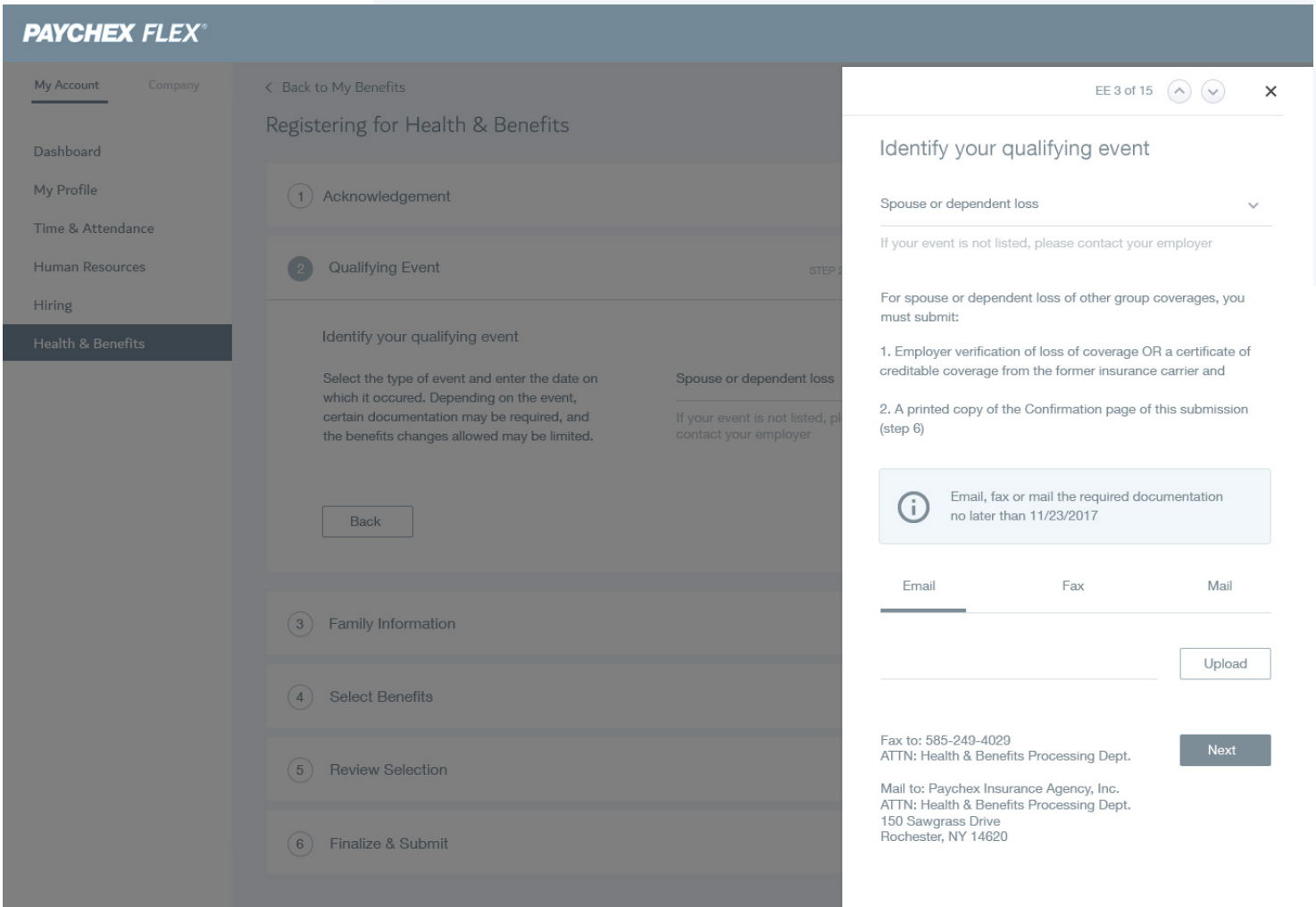
Discussions with customers had to be incentivized to get as much quantitive data as possible.

Legacy website



Wireframes


PAYCHEX FLEX
My Account
Company
Dashboard
My Profile
Time & Attendance
Human Resources
Hiring
Health & Benefits
Back to My Benefits
Registering for Health & Benefits
1 Acknowledgement
2 Qualifying Event
3 Family Information
STEP 3 OF 6
Select the type of event and enter the date on which it occured. Depending on the event, certain documentation may be required, and the benefits changes allowed may be limited.
Select Event
If your event is not listed, please contact your employer
Back
Next
4 Select Benefits
5 Review Selection


PAYCHEX FLEX
My Account
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Dashboard
My Profile
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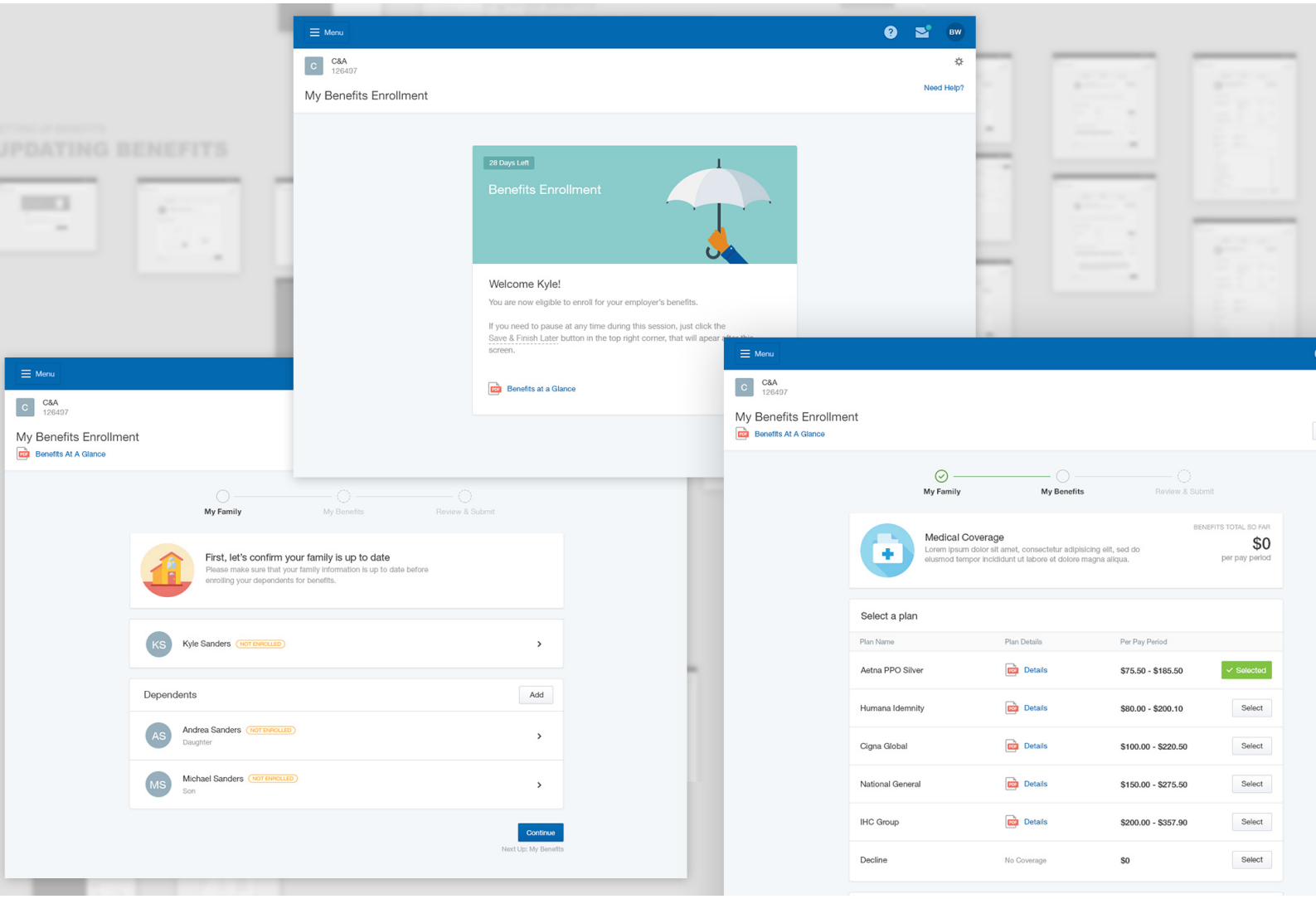
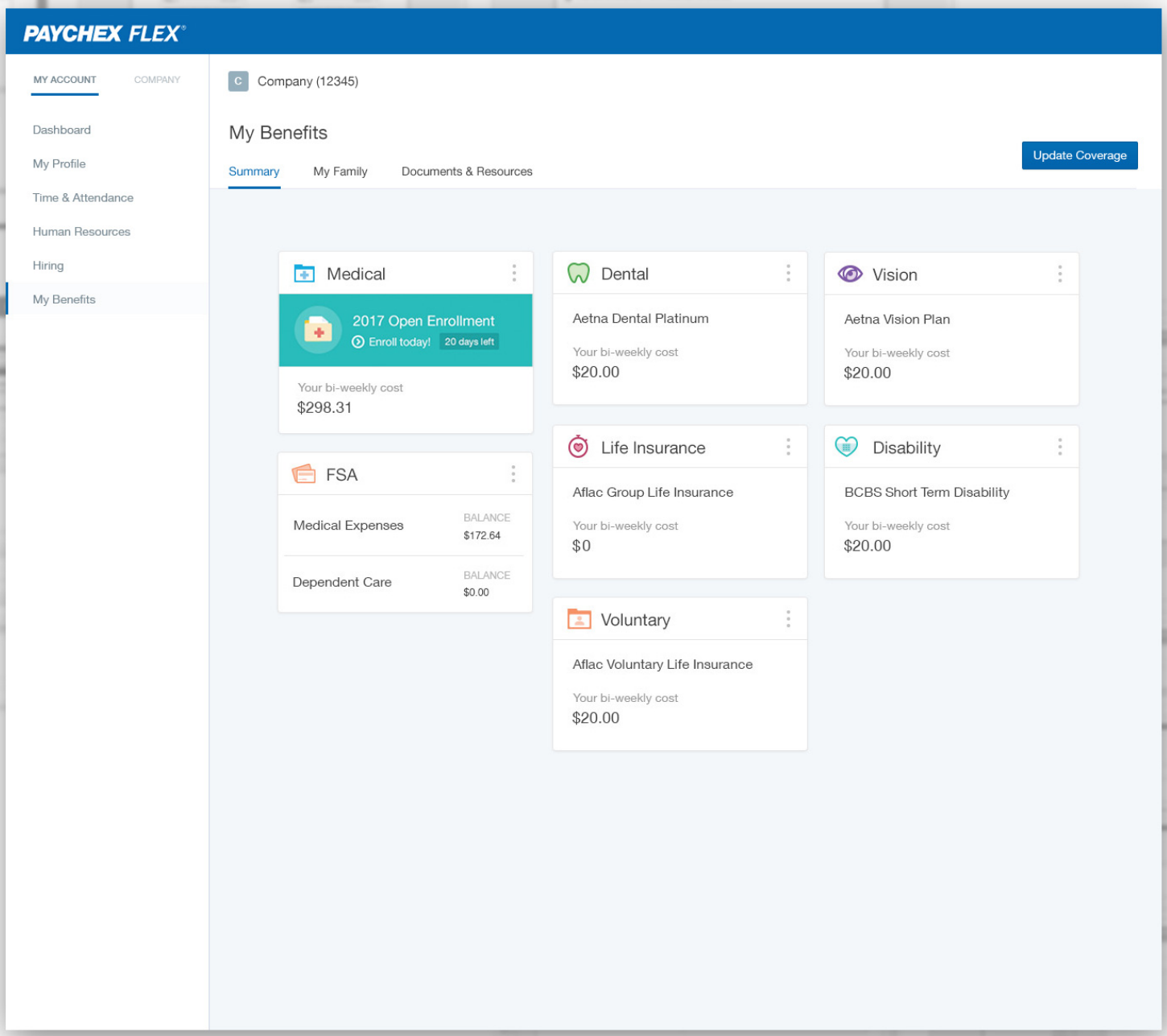
Human Resources
Hiring
Health & Benefits
Back to My Benefits
Registering for Health & Benefits
1 Acknowledgement
2 Qualifying Event
Identify your qualifying event
Select the type of event and enter the date on which it occured. Depending on the event, certain documentation may be required, and the benefits changes allowed may be limited.
Spouse or dependent loss
Back
3 Family Information
4 Select Benefits
5 Review Selection
6 Finalize & Submit
EE 3 of 15
Identify your qualifying event
Spouse or dependent loss
If your event is not listed, please contact your employer
For spouse or dependent loss of other group coverages, you must submit:
1. Employer verification of loss of coverage OR a certificate of creditable coverage from the former insurance carrier and
2. A printed copy of the Confirmation page of this submission (step 6)
Email, fax or mail the required documentation no later than 11/23/2017
Email
Fax
Mail
Upload
Fax to: 585-249-4029
ATTN: Health & Benefits Processing Dept.
Next
Mail to: Paychex Insurance Agency, Inc.
ATTN: Health & Benefits Processing Dept.
150 Sawgrass Drive
Rochester, NY 14620

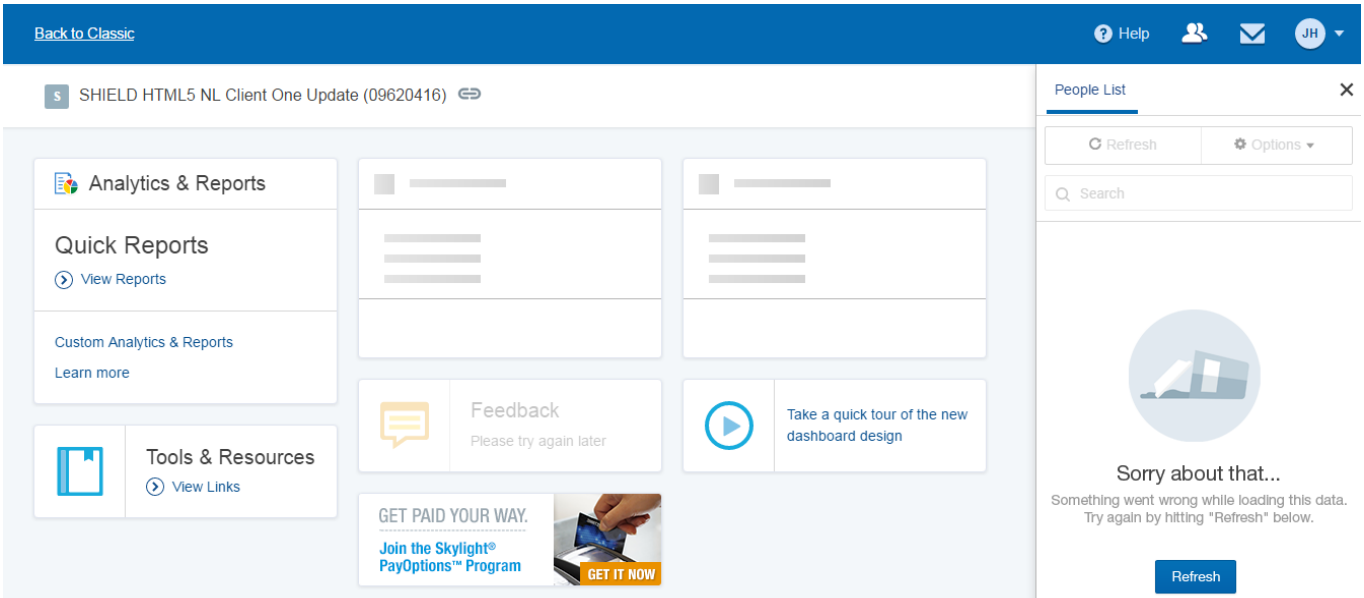
Enrollment process

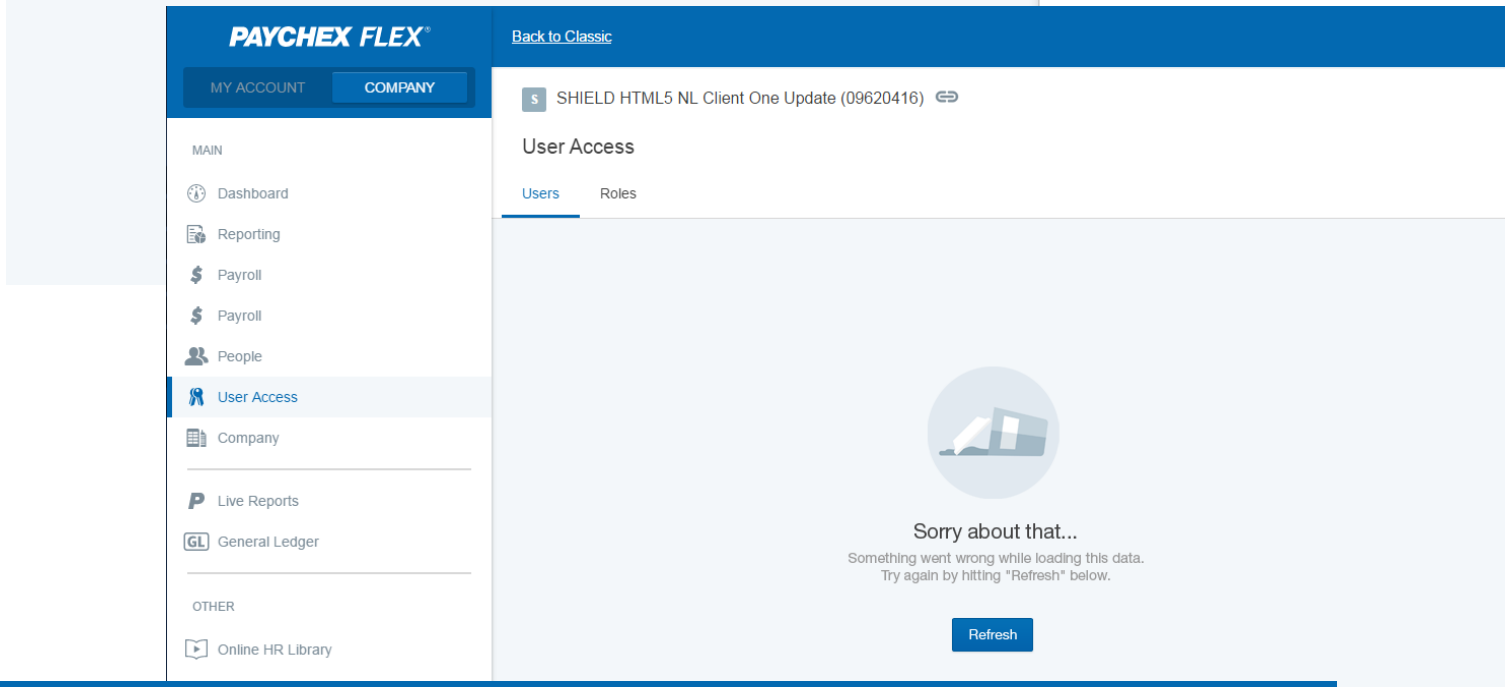


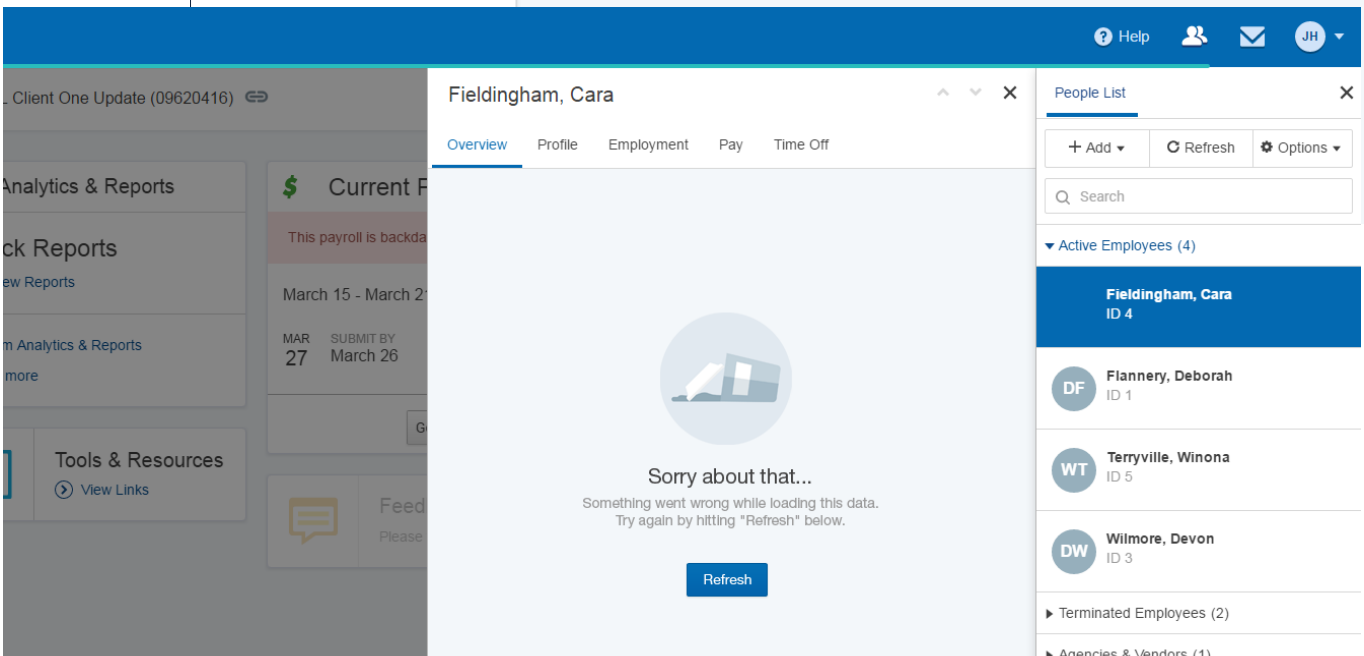
Dashboard after enrollment



Error handling







Links

PAYCHEX
My Benefits - Employee
2018
SCENARIO
PEO
Payroll Only
SCENARIO
PEO
New Hire /
Annual Enrollment
SCENARIO
PEO
During the Year
+ Qualifying Event