

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 enrollment 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 notifications 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 quantitative data as possible.

Legacy website

Menu [Back to Classic](#) Help EE

B BM PEO Client 2 09800132

Health and Benefits Services for Employees Contact Us

Add Dependents BM PEO Client 2 - 0741 / 09800132 EE3 EE3

[Home](#) **1 Add Dependents** 2 Review Dependents 3 Choose Next Steps 4 Confirmation

Add a dependent

Complete all information for your dependent. [?](#) To add more than one dependent, select yes below and complete all information for each dependent. Click **Next** to continue.

First name	<input type="text"/>	Date of birth	<input type="text"/>
Last name	EE3	Relationship	Choose Relationship
SSN	<input type="text"/>	Sex	<input type="radio"/> Female
Address	EE Address 3		<input type="radio"/> Male
City	Orlando	Student	<input type="radio"/> Yes
State	FL - Florida		<input type="radio"/> No
ZIP Code	32801	Incapacitated	? <input type="checkbox"/>

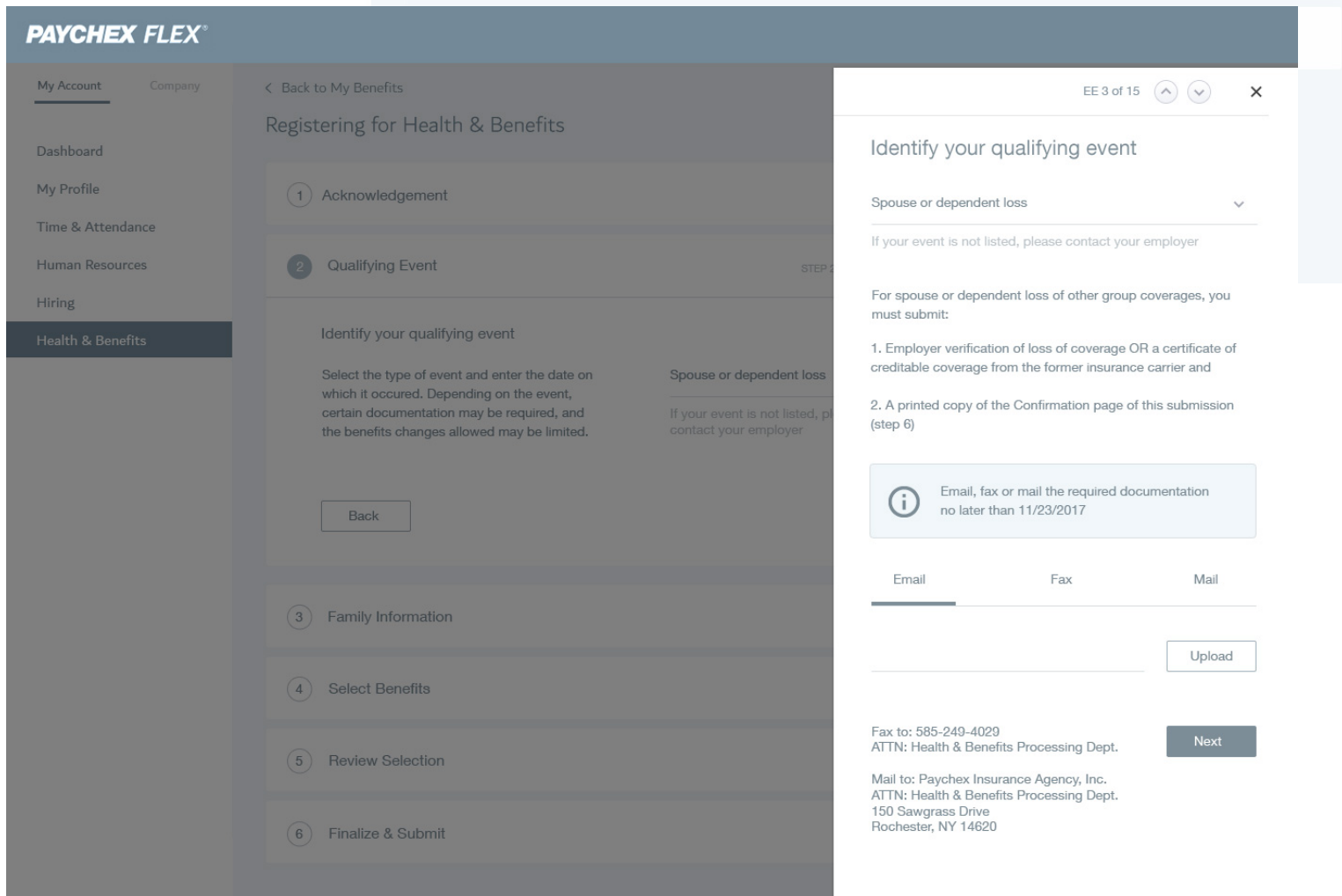
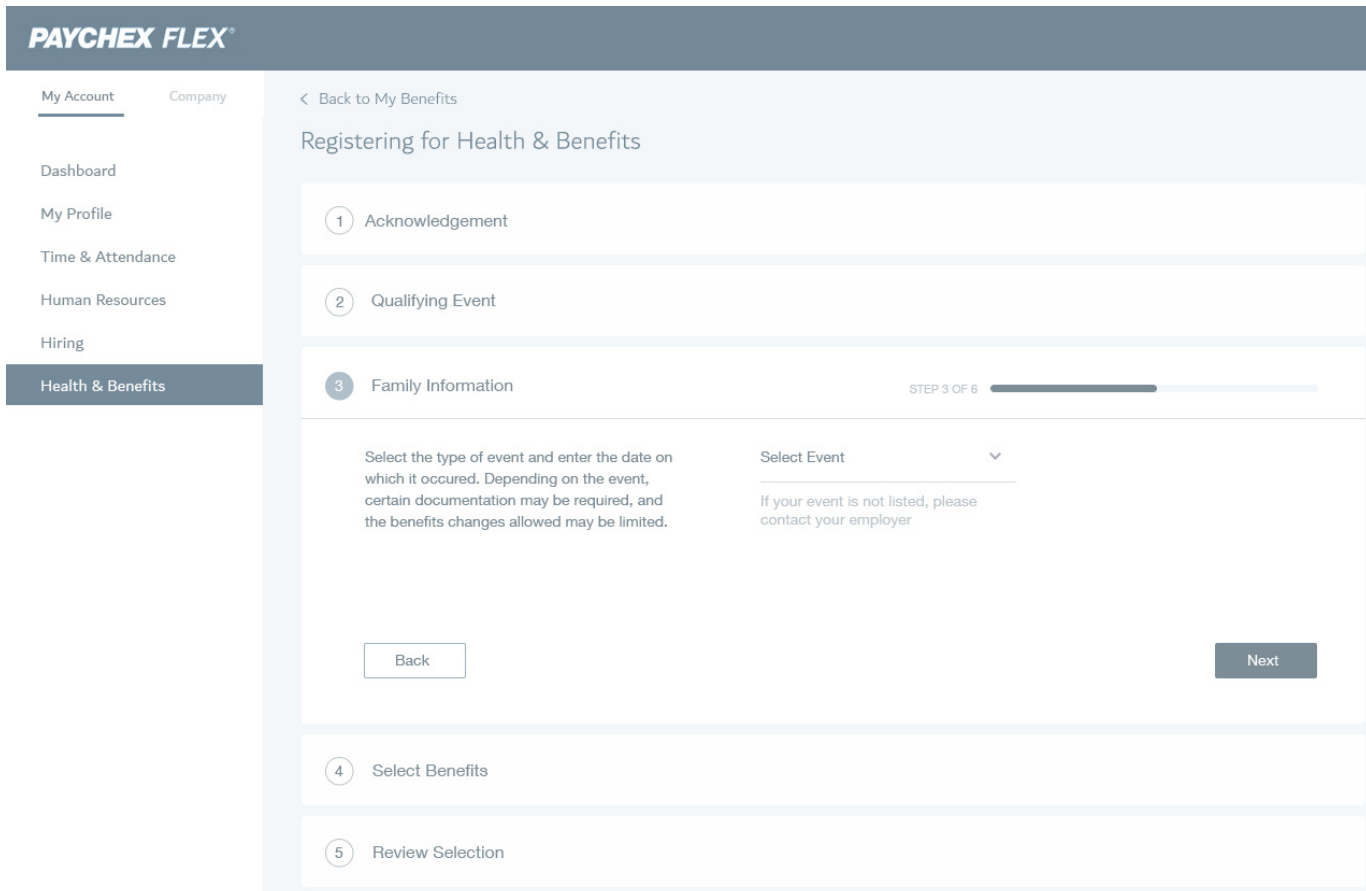
Do you want to add another dependent? Yes No

[Next](#) [Cancel](#)

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Wireframes



Enrollment process

Menu

C&A 126497

My Benefits Enrollment

Need Help?

28 Days Left

Benefits Enrollment

Welcome Kyle!

You are now eligible to enroll for your employer's benefits.

If you need to pause at any time during this session, just click the Save & Finish Later button in the top right corner, that will appear at the bottom of this screen.

[Benefits at a Glance](#)

Menu

C&A 126497

My Benefits Enrollment

[Benefits At A Glance](#)

My Family My Benefits Review & Submit

Medical Coverage BENEFITS TOTAL SO FAR
\$0
per pay period

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Select a plan

Plan Name	Plan Details	Per Pay Period	
Aetna PPO Silver	Details	\$75.50 - \$185.50	<input checked="" type="checkbox"/> Selected
Humana Idemnity	Details	\$80.00 - \$200.10	<input type="checkbox"/> Select
Cigna Global	Details	\$100.00 - \$220.50	<input type="checkbox"/> Select
National General	Details	\$150.00 - \$275.50	<input type="checkbox"/> Select
IHC Group	Details	\$200.00 - \$357.90	<input type="checkbox"/> Select
Decline	No Coverage	\$0	<input type="checkbox"/> Select

Menu

C&A 126497

My Benefits Enrollment

[Benefits At A Glance](#)

My Family My Benefits Review & Submit

First, let's confirm your family is up to date
Please make sure that your family information is up to date before enrolling your dependents for benefits.

KS Kyle Sanders NOT ENROLLED >

Dependents [Add](#)

AS Andrea Sanders NOT ENROLLED
Daughter >

MS Michael Sanders NOT ENROLLED
Son >

[Continue](#)
Next Up: My Benefits

Dashboard after enrollment

PAYCHEX FLEX

MY ACCOUNT COMPANY

Company (12345)

My Benefits

Summary My Family Documents & Resources [Update Coverage](#)

Medical

2017 Open Enrollment
Enroll today! 20 days left

Your bi-weekly cost
\$298.31

Dental

Aetna Dental Platinum

Your bi-weekly cost
\$20.00

Vision

Aetna Vision Plan

Your bi-weekly cost
\$20.00

FSA

Medical Expenses	BALANCE \$172.64
Dependent Care	BALANCE \$0.00

Life Insurance

Aflac Group Life Insurance

Your bi-weekly cost
\$0

Disability

BCBS Short Term Disability

Your bi-weekly cost
\$20.00

Voluntary

Aflac Voluntary Life Insurance

Your bi-weekly cost
\$20.00

Error handling

Back to Classic

SHIELD HTML5 NL Client One Update (09620416)

Analytics & Reports

Quick Reports

View Reports

Custom Analytics & Reports

Learn more

Tools & Resources

View Links

Feedback

Please try again later

Take a quick tour of the new dashboard design

GET PAID YOUR WAY. Join the Skylight® PayOptions™ Program GET IT NOW

People List

Refresh Options

Search

Sorry about that...
Something went wrong while loading this data.
Try again by hitting "Refresh" below.

Refresh

PAYCHEX FLEX

Back to Classic

MY ACCOUNT COMPANY

SHIELD HTML5 NL Client One Update (09620416)

User Access

Users Roles

Sorry about that...
Something went wrong while loading this data.
Try again by hitting "Refresh" below.

Refresh

Dashboard

Reporting

Payroll

Payroll

People

User Access

Company

Live Reports

General Ledger

Online HR Library

Client One Update (09620416)

Fieldingham, Cara

Overview Profile Employment Pay Time Off

People List

Add Refresh Options

Search

Active Employees (4)

Fieldingham, Cara ID 4

DF Flannery, Deborah ID 1

WT Terryville, Winona ID 5

DW Wilmore, Devon ID 3

Terminated Employees (2)

Agencies & Vendors (1)

Current Payroll

This payroll is backdated

March 15 - March 20

MAR 27 SUBMIT BY March 26

Sorry about that...
Something went wrong while loading this data.
Try again by hitting "Refresh" below.

Refresh

Links

PAYCHEX[®]

My Benefits - Employee
2018

SCENARIO

PEO
Payroll Only



SCENARIO

PEO
New Hire /
Annual Enrollment



SCENARIO

PEO
During the Year
+ Qualifying Event

