

Rejected Policy Transactions Screen



I worked as the UX lead on my team to improve the usability of the Rejected Transactions screen on Comp 2.0, an internal sales and compensation tool for SafeCo Insurance.

The Problem: Current view of the Rejected Transactions screen is unorganized, displays unnecessary information, and is out of date.

User Interviews

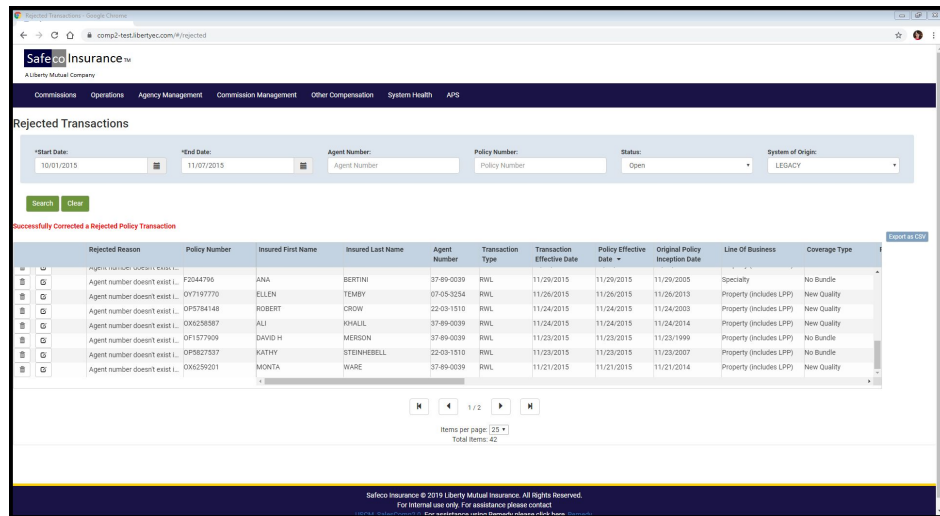
I conducted user interviews with Comp 2.0 stakeholders to identify issues with the current workflow and reviewed the findings with my team.

"...Pertinent info is policy number, name, and missing field --> never touch agent number, policy number, status, and system of origin

Rejected reasons block is too small, if there are more than one you can't see it. Should display if there are multiple things to fix

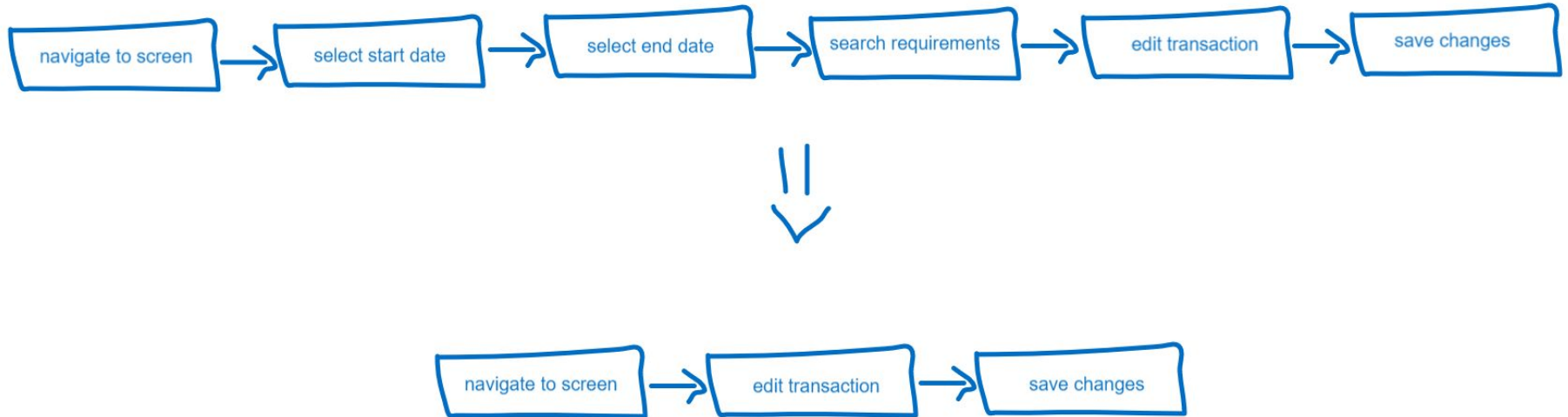
Making error reasons clearer: policy inception date is invalid is NOT a correct error message to display when the agent number has not been loaded into comp2

Successful push of corrected transactions is also red, which is counterintuitive..."



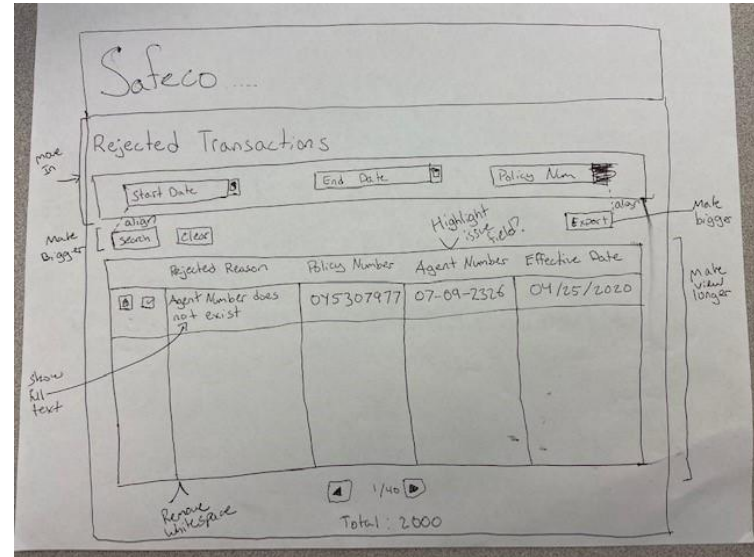
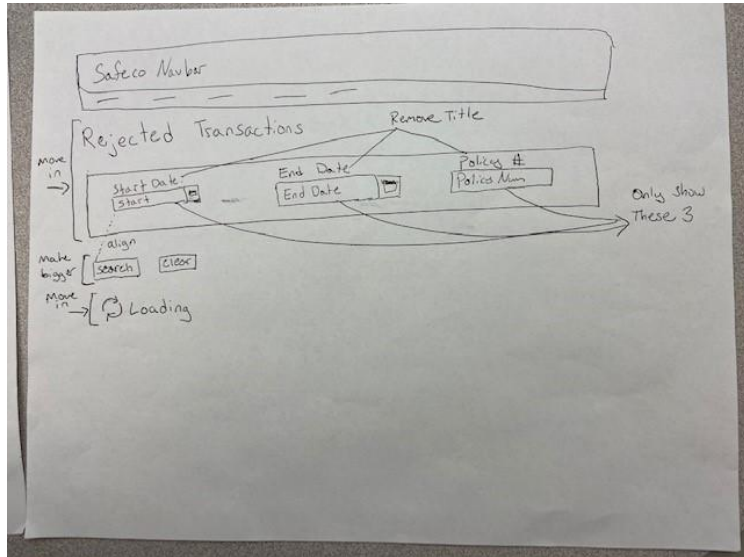
Simplifying the Workflow

The current workflow included unnecessary required steps for the users that provided to functional purpose for the screen's use. I simplified the process to streamline the user's experience on the page.



Sketches and Wireframes

I sketched out my initial thoughts for a new workflow for the screen and brought them to my team. We met to solidify the direction to take for the new design, eventually deciding to eliminate the search component completely.



Prototype and Demo

I took my ideas to Axure RP and developed a prototype for the new Rejected Policy Transactions screen. Next, I lead a demo to the Comp 2.0 stakeholders for their approval and the development process began to implement the UI changes.

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Rejected Transactions

Showing all open rejected transaction(s)

export


		Rejected Reason	Date Created	Policy Number	Insured First Name	Insured Last Name	Agent Number	Transaction Type	Transaction Effective Date	Policy Effective Date	Original Inception
		Agent number does not exist.	11/23/2018	UX6470007	SARA	TYSON	19-17-4607	END	10/26/2019	10/26/2019	02/02/2019
		Agent number does not exist.	06/12/2019	UX6470007	ROBERT	GRAHAM	19-17-4607	XLC-INS	10/27/2019	11/09/2018	01/01/2019
		Marital status is invalid.	11/23/2018	VY581118	SARA	SMITH-JONES	19-17-4607	XLC-INS	11/21/2018	11/09/2018	02/02/2019
		Company code is invalid.	11/23/2018	UX6470007	GENE	TYSON	19-17-4607	END	10/27/2019	11/09/2018	01/01/2019
		Agent number does not exist.	06/12/2019	UX6470007	JESSICA	DILL	19-17-4607	XLC-INS	10/26/2019	10/26/2019	02/02/2019
		Agent number does not exist.	06/12/2019	VY581118	ALBERT	BUCKLY	19-17-4607	END	10/26/2019	11/09/2018	01/01/2019
		Marital status is invalid.	11/23/2018	UX6470007	DAKOTA	GREENE	19-17-4607	END	10/27/2019	11/09/2018	02/02/2019
		Company code is invalid.	11/23/2018	UX6470007	GENE	BROOKES	19-17-4607	XLC-INS	11/21/2018	10/26/2019	01/01/2019
		Agent number does not exist.	06/12/2019	VY581118	ALBERT	JACOBSON	19-17-4607	XLC-INS	10/27/2019	11/09/2018	02/02/2019
		Marital status is invalid.	06/12/2019	UX6470007	MADLINE	BING	19-17-4607	END	11/21/2018	10/26/2019	01/01/2019
		Agent number does not exist.	11/23/2018	VY581118	ALBERT	SMITH	19-17-4607	XLC-INS	10/27/2019	11/09/2018	02/02/2019
		Marital status is invalid.	06/12/2019	UX6470007	DAKOTA	JAMES	19-17-4607	END	10/27/2019	11/09/2018	02/02/2019
		Company code is invalid.	06/12/2019	UX6470007	GENE	BROWN	19-17-4607	END	10/27/2019	11/09/2018	01/01/2019
		Agent number does not exist.	11/23/2018	UX6470007	ROBERT	GREENE	19-17-4607	XLC-INS	10/27/2019	11/09/2018	01/01/2019
		Marital status is invalid.	11/23/2018	VY581118	JAMES	JONES	19-17-4607	XLC-INS	11/21/2018	11/09/2018	02/02/2019

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Rejected Transactions

Showing all open rejected transaction(s)

Successfully corrected a Rejected Policy Transaction


[export](#)

		Rejected Reason	Date Created	Policy Number	Insured First Name	Insured Last Name	Agent Number	Transaction Type	Transaction Effective Date	Policy Effective Date	Original Policy Inception Date
		Agent number does not exist.	11/23/2018	ROBERT	GRAHAM	19-17-4607	XLC-INS ▼	10/27/2019	11/09/2018	01/01/2011	Home
		Marital status is invalid.	11/23/2018	VY581118	SARA	SMITH-JONES	19-17-4607	XLC-INS	11/21/2018	11/09/2018	02/02/201
		Company code is invalid.	11/23/2018	UX6470007	GENE	TYSON	19-17-4607	END	10/27/2019	11/09/2018	01/01/201
		Agent number does not exist.	06/12/2019	UX6470007	JESSICA	DILL	19-17-4607	XLC-INS	10/26/2019	10/26/2019	02/02/201
		Agent number does not exist.	06/12/2019	VY581118	ALBERT	BUCKLY	19-17-4607	END	10/26/2019	11/09/2018	01/01/201
		Marital status is invalid.	11/23/2018	UX6470007	DAKOTA	GREENE	19-17-4607	END	10/27/2019	11/09/2018	02/02/201
		Company code is invalid.	11/23/2018	UX6470007	GENE	BROOKES	19-17-4607	XLC-INS	11/21/2018	10/26/2019	01/01/201
		Agent number does not exist.	06/12/2019	VY581118	ALBERT	JACOBSON	19-17-4607	XLC-INS	10/27/2019	11/09/2018	02/02/201
		Marital status is invalid.	06/12/2019	UX6470007	MADELINE	BING	19-17-4607	END	11/21/2018	10/26/2019	01/01/201
		Agent number does not exist.	11/23/2018	VY581118	ALBERT	SMITH	19-17-4607	XLC-INS	10/27/2019	11/09/2018	02/02/201
		Marital status is invalid.	06/12/2019	UX6470007	DAKOTA	JAMES	19-17-4607	END	10/27/2019	11/09/2018	02/02/201
		Company code is invalid.	06/12/2019	UX6470007	GENE	BROWN	19-17-4607	END	10/27/2019	11/09/2018	01/01/201
		Agent number does not exist.	11/23/2018	UX6470007	ROBERT	GREENE	19-17-4607	XLC-INS	10/27/2019	11/09/2018	01/01/201
		Marital status is invalid.	11/23/2018	VY581118	JAMES	JONES	19-17-4607	XLC-INS	11/21/2018	11/09/2018	02/02/201
		Agent number does not exist.	11/23/2018	UX6470007	JAKE	WILSON	19-17-4607	END	10/26/2019	10/26/2019	02/02/201

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