

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The Problem: Current view of the Rejected Transactions screen is unorganized, displays unnecessary information, and is out of date.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

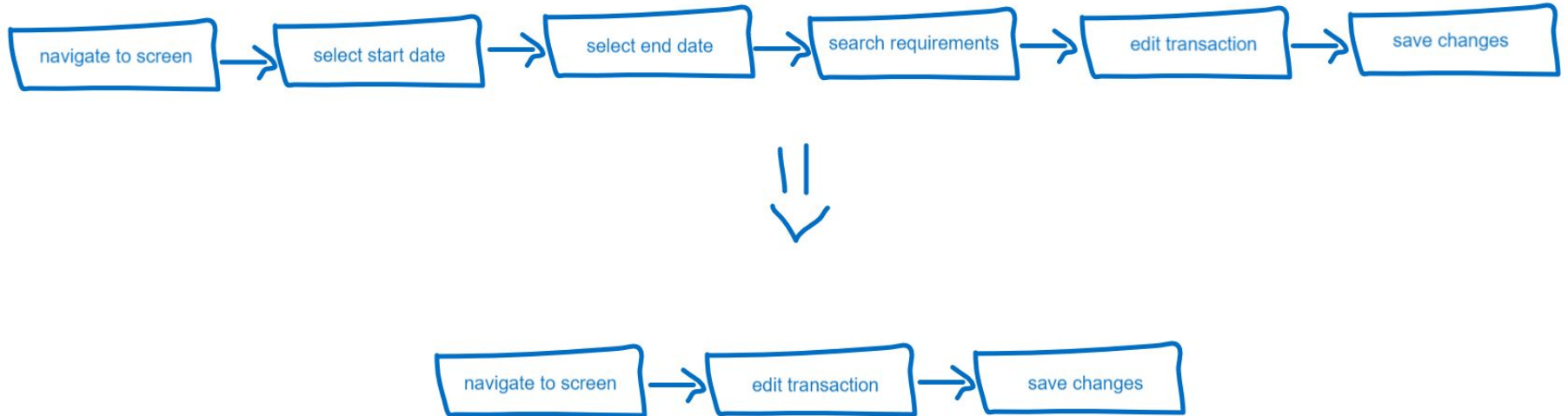
Making error reasons clearer: policy inception date is invalid is NOT a correct error message to display when the agent number has not been loaded into comp2

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

	Rejected Reason	Policy Number	Insured First Name	Insured Last Name	Agent Number	Transaction Type	Transaction Effective Date	Policy Effective Date	Original Policy Inception Date	Line Of Business	Coverage Type
U	Agent number doesn't exist...	F2044796	JANA	BERTINI	37-69-0039	RWL	11/29/2015	11/29/2015	11/29/2005	Specialty	No Bundle
G	Agent number doesn't exist...	0Y7197770	ELLEN	TEMBY	07-05-3254	RWL	11/26/2015	11/26/2015	11/26/2013	Property (includes LPF)	New Quality
G	Agent number doesn't exist...	DP9784148	ROBERT	CROW	22-03-1510	RWL	11/24/2015	11/24/2015	11/24/2003	Property (includes LPF)	New Quality
G	Agent number doesn't exist...	0X6298897	ALI	HOWELL	37-69-0039	RWL	11/24/2015	11/24/2015	11/24/2014	Property (includes LPF)	New Quality
G	Agent number doesn't exist...	0Y1577906	DAVID W	MERSON	37-69-0039	RWL	11/23/2015	11/23/2015	11/23/1999	Property (includes LPF)	No Bundle
G	Agent number doesn't exist...	DP9827537	KATHY	STEINHEBEL	22-03-1510	RWL	11/23/2015	11/23/2015	11/23/2007	Property (includes LPF)	No Bundle
G	Agent number doesn't exist...	0X6298201	MONTA	WARE	37-69-0039	RWL	11/21/2015	11/21/2015	11/21/2014	Property (includes LPF)	New Quality

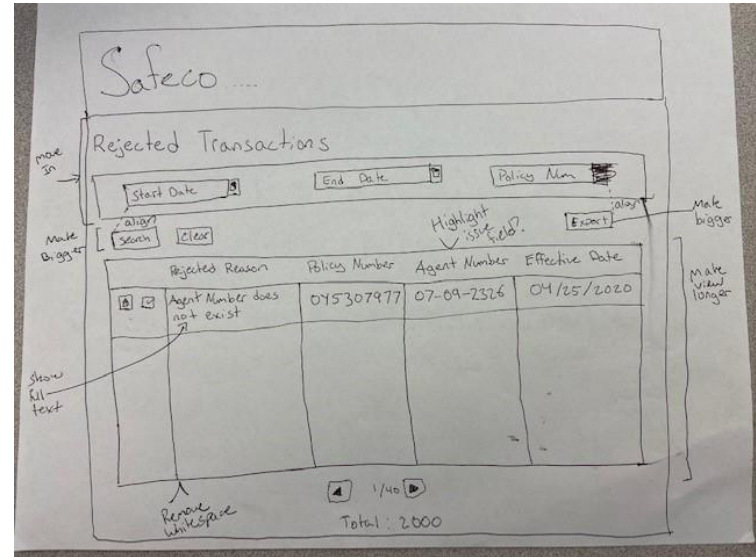
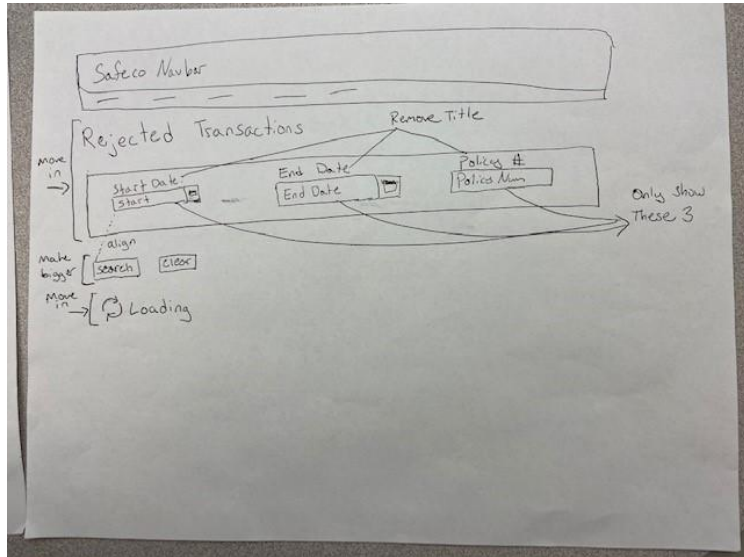
# Simplifying the Workflow

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 my team and got feedback from developers on what would be feasible given the current implementation.

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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 Date
	Agent number does not exist.	11/23/2018	UX6470007	SARA	TYSON	19-17-4607	END	10/26/2019	10/26/2019	02/02/2011
	Agent number does not exist.	06/12/2019	UX6470007	ROBERT	GRAHAM	19-17-4607	XLC-INS	10/27/2019	11/09/2018	01/01/2011
	Marital status is invalid.	11/23/2018	YV581118	SARA	SMITH-JONES	19-17-4607	XLC-INS	11/21/2018	11/09/2018	02/02/2011
	Company code is invalid.	11/23/2018	UX6470007	GENE	TYSON	19-17-4607	END	10/27/2019	11/09/2018	01/01/2011
	Agent number does not exist.	06/12/2019	UX6470007	JESSICA	DILL	19-17-4607	XLC-INS	10/26/2019	10/26/2019	02/02/2011
	Agent number does not exist.	06/12/2019	YV581118	ALBERT	BUCKLY	19-17-4607	END	10/26/2019	11/09/2018	01/01/2011
	Marital status is invalid.	11/23/2018	UX6470007	DAKOTA	GREENE	19-17-4607	END	10/27/2019	11/09/2018	02/02/2011
	Company code is invalid.	11/23/2018	UX6470007	GENE	BROOKES	19-17-4607	XLC-INS	11/21/2018	10/26/2019	01/01/2011
	Agent number does not exist.	06/12/2019	YV581118	ALBERT	JACOBSON	19-17-4607	XLC-INS	10/27/2019	11/09/2018	02/02/2011
	Marital status is invalid.	06/12/2019	UX6470007	MADLINE	BING	19-17-4607	END	11/21/2018	10/26/2019	01/01/2011
	Agent number does not exist.	11/23/2018	YV581118	ALBERT	SMITH	19-17-4607	XLC-INS	10/27/2019	11/09/2018	02/02/2011
	Marital status is invalid.	06/12/2019	UX6470007	DAKOTA	JAMES	19-17-4607	END	10/27/2019	11/09/2018	02/02/2011
	Company code is invalid.	06/12/2019	UX6470007	GENE	BROWN	19-17-4607	END	10/27/2019	11/09/2018	01/01/2011
	Agent number does not exist.	11/23/2018	UX6470007	ROBERT	GREENE	19-17-4607	XLC-INS	10/27/2019	11/09/2018	01/01/2011
	Marital status is invalid.	11/23/2018	YV581118	JAMES	JONES	19-17-4607	XLC-INS	11/21/2018	11/09/2018	02/02/2011

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1216 Item(s)

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Rejected Transactions

Showing all open rejected transaction(s)

export

Successfully corrected a Rejected Policy Transaction

	Rejected Reason	Date Created	Policy Number	Insured First Name	Insured Last Name	Agent Number	Transaction Type	Transaction Effective Date	Policy Effective Date	Original 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	YV581118	SARA	SMITH-JONES	19-17-4607	XLC-INS	11/21/2018	11/09/2018	02/02/2011
	Company code is invalid.	11/23/2018	UX6470007	GENE	TYSON	19-17-4607	END	10/27/2019	11/09/2018	01/01/2011
	Agent number does not exist.	06/12/2019	UX6470007	JESSICA	DILL	19-17-4607	XLC-INS	10/26/2019	10/26/2019	02/02/2011
	Agent number does not exist.	06/12/2019	YV581118	ALBERT	BUCKLY	19-17-4607	END	10/26/2019	11/09/2018	01/01/2011
	Marital status is invalid.	11/23/2018	UX6470007	DAKOTA	GREENE	19-17-4607	END	10/27/2019	11/09/2018	02/02/2011
	Company code is invalid.	11/23/2018	UX6470007	GENE	BROOKES	19-17-4607	XLC-INS	11/21/2018	10/26/2019	01/01/2011
	Agent number does not exist.	06/12/2019	YV581118	ALBERT	JACOBSON	19-17-4607	XLC-INS	10/27/2019	11/09/2018	02/02/2011
	Marital status is invalid.	06/12/2019	UX6470007	MADLINE	BING	19-17-4607	END	11/21/2018	10/26/2019	01/01/2011
	Agent number does not exist.	11/23/2018	YV581118	ALBERT	SMITH	19-17-4607	XLC-INS	10/27/2019	11/09/2018	02/02/2011
	Marital status is invalid.	06/12/2019	UX6470007	DAKOTA	JAMES	19-17-4607	END	10/27/2019	11/09/2018	02/02/2011
	Company code is invalid.	06/12/2019	UX6470007	GENE	BROWN	19-17-4607	END	10/27/2019	11/09/2018	01/01/2011
	Agent number does not exist.	11/23/2018	UX6470007	ROBERT	GREENE	19-17-4607	XLC-INS	10/27/2019	11/09/2018	01/01/2011
	Marital status is invalid.	11/23/2018	YV581118	JAMES	JONES	19-17-4607	XLC-INS	11/21/2018	11/09/2018	02/02/2011
	Agent number does not exist.	11/23/2018	UX6470007	JAKE	WILSON	19-17-4607	END	10/26/2019	10/26/2019	02/02/2011

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# Final Results - Demoed to stakeholders























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## Rejected Transactions

Showing all open Rejected Policy Transaction(s)

[export all](#)

	Date Created ^	Rejected Reason	Policy Number ^	First Name ^	Last Name ^	Agent Number ^	Transaction Type ^	Transaction Effective Date ^	Policy Effective Date ^	Original Policy Inception Date
 	12/13/2016	Transaction Type is invalid : null - for Staging Record Id : 397967...	A0CS12020849...	FIRST NAME	LAST NAME	11680000			10/04/2016	10/04/2016
 	12/13/2016	Transaction Type is invalid : null - for Staging Record Id : 397967...	A0CS12020849...	FIRST NAME	LAST NAME	11680000			10/04/2016	10/04/2016
 	12/13/2016	New Business policy cannot have negative premium :-875.0 - fo...	H4CS12014502...	FIRST NAME	LAST NAME	11680000	NBS	10/14/2016	09/02/2016	09/02/2016
 	12/13/2016	New Business policy cannot have negative premium :-875.0 - fo...	H4CS12014502...	FIRST NAME	LAST NAME	11680000	NBS	10/14/2016	09/02/2016	09/02/2016
 	12/13/2016	New Business policy cannot have negative premium :-875.0 - fo...	H4CS12014502...	FIRST NAME	LAST NAME	11680000	NBS	10/14/2016	09/02/2016	09/02/2016
 	12/13/2016	New Business policy cannot have negative premium :-875.0 - fo...	H4CS12014502...	FIRST NAME	LAST NAME	11680000	NBS	10/14/2016	09/02/2016	09/02/2016
 	12/13/2016	New Business policy cannot have negative premium :-875.0 - fo...	H4CS12014502...	FIRST NAME	LAST NAME	11680000	NBS	10/14/2016	09/02/2016	09/02/2016
 	12/13/2016	Unable to derive Term Begin Type. Staging Transaction Type is :...	H6CS12019710...	FIRST NAME	LAST NAME	11680049	END	10/04/2016	09/14/2016	09/14/2016
 	12/13/2016	Unable to derive Term Begin Type. Staging Transaction Type is :...	H6CS12019710...	FIRST NAME	LAST NAME	11680049	END	10/04/2016	09/14/2016	09/14/2016
 	12/13/2016	Unable to derive Term Begin Type. Staging Transaction Type is :...	H6CS12019710...	FIRST NAME	LAST NAME	11680049	END	10/04/2016	09/14/2016	09/14/2016
 	12/13/2016	Agent number is invalid : 4567890 - for Staging Record Id : 39796...	H9CS12026387...	FIRST NAME	LAST NAME	4567890	NBS	10/04/2016	10/04/2016	10/04/2016
 	12/13/2016	Unable to derive Term Begin Type. Staging Transaction Type is :...	H6CS12019710...	FIRST NAME	LAST NAME	11680049	END	10/04/2016	09/14/2016	09/14/2016
 	12/13/2016	Unable to derive Term Begin Type. Staging Transaction Type is :...	H6CS12019710...	FIRST NAME	LAST NAME	11680049	END	10/04/2016	09/14/2016	09/14/2016
 	12/13/2016	Unable to derive Term Begin Type. Staging Transaction Type is :...	H6CS12019710...	FIRST NAME	LAST NAME	11680049	END	10/04/2016	09/14/2016	09/14/2016
 	12/13/2016	Unable to derive Term Begin Type. Staging Transaction Type is :...	H6CS12019710...	FIRST NAME	LAST NAME	11680049	END	10/04/2016	09/14/2016	09/14/2016

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# Editing moved from inline to pop-up

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Rejected Transactions

Showing all open Rejected Policy Transaction(s)

export all

Edit Rejected Transaction

Rejected Reason: Agent number is invalid : 4567890 - for Staging Record Id : 99796732

Policy Number

H6CS1202638780

Line of Business

Property

Insured Age

25

Coded

N

First Name

FIRST NAME

Coverage Type

Ultra

Home With Auto

N

Marital Status

Single

Last Name

LAST NAME

Product Type

Regular Home

Multi Vehicle

N

Company Code

2500-Employers Insurance Company of Wasau

Agent Number

4567890

Policy Term

12

Gross Sell Any

N

Bill Type \*

Transaction Type

NBS

Rating State

ME

Auto With Home

N

Business Type \*

Transaction Effective Date

10/4/2016

Gross Premium

1774.00

OTR

N

Term Begin Type

New Business

Policy Effective Date

10/4/2016

Comm Premium

1774.00

Contract Type \*

N

Gold Gross Sell

Original Policy Inception Date

10/4/2016

Non-Comm Premium

0.0

OEA

N

Renewal Conversion

N

OK

CANCEL

12/13/2016

Unable to derive Term Begin Type. Staging Transaction Type is ...

H6CS12019710...

FIRST NAME

LAST NAME

11680049

END

10/04/2016

09/14/2016

09/14/2016

12/13/2016

Unable to derive Term Begin Type. Staging Transaction Type is ...

H6CS12019710...

FIRST NAME

LAST NAME

11680049

END

10/04/2016

09/14/2016

09/14/2016

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# Editing now has validation of fields

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Rejected Transactions

Showing all open Rejected Policy Transaction(s)

export all

Edit Rejected Transaction

Rejected Reason: Unable to derive Term Begin Type. Staging Transaction Type is : 04\_Policy Number is : H4CS1202480880 Policy Effective Date is : 2016-11-05 and Transaction Effective Date is : 2016-11-10- for Staging Record id : 39796782

Policy Number	Line of Business	Insured Age	Ceded
H4CS1202480880	Property	25	N
First Name	Coverage Type	Home With Auto	Marital Status
FIRST NAME	No Bundle	N	Single
Last Name	Product Type	Multi Vehicle	Company Code
LAST NAME	Regular Home		2500-Employers Insurance Company of Wasau
Agent Number	Policy Term	Gross Sell Any	Bill Type *
11680000	12	N	
Transaction Type	Rating State	Auto With Home	Business Type *
END	ME	N	
Transaction Effective Date	Gross Premium	OTR	Term Begin Type *
11/10/2016	45.00	N	
Policy Effective Date	Comm Premium	Contract Type *	Goid Gross Sell
11/5/2016	45.00		N
Original Policy Inception Date	Non-Comm Premium	CEA	Renewal Conversion
11/5/2016	0.0	N	N

OK

CANCEL

12/13/2016

Transaction Type is invalid : null - for Staging Record id : 397967...

H4CS12026136...

FIRST NAME

LAST NAME

11680296

10/04/2016

10/04/2016

12/13/2016

Transaction Type is invalid : null - for Staging Record id : 397967...

H4CS12026136...

FIRST NAME

LAST NAME

11680296

10/04/2016

10/04/2016

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1 2 3