

Research shareout

Advisor Portal Usability Test



Purpose:

Present findings from our recent
usability study and discuss
implications for future Advisor Portal
product strategy



Agenda:

- Research Goals
- Process
- Findings
- Recommendations
- High-Fidelity Prototype

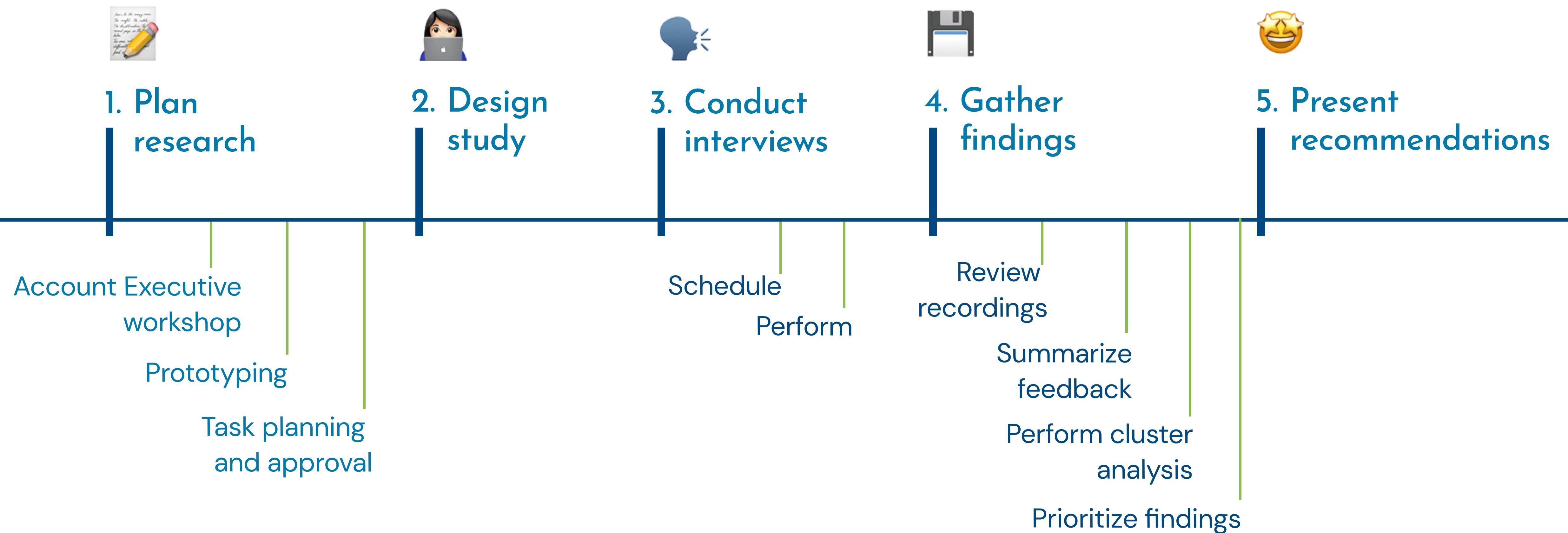
Validate navigation decisions and ensure we meet Advisors' needs

Are features and information prioritized according to their importance to the Advisor?

Are site functionalities grouped logically and labeled in terms the Advisor understands?

Can the Advisor easily find the information or documents they need?

PROCESS



PROCESS

Timeline

10

weeks

From planning to performing the interviews and analyzing findings.

Interviews

6

participants

Interviews conducted remotely via WebEx video calls:

- 4 female
- 2 male

Methodology

5

testing tasks

Structured interviews where all participants performed the same tasks, with an opportunity for open-ended feedback at the end.

TOOLS

Advisor Portal - Usability Test

Test Goals

- Ensure it's going to be recorded and the video will only be available for review after the analysis is finished
- Moderated
- Qualitative

Test Format

- Remote
- UX Writing
- Task Scenarios
- Final Questions
- Persons
- Metrics

Facilitators

- Taylor Venda
- Elizabeth Morgan

Schedule

Script

Post-task follow-up questions (ask as applicable)

- What did you expect to see when you clicked on [link]?
- I noticed you slowed down during [task]. Was there something that was difficult?
- Did you want to [screen] first. What were you thinking when you did that?
- What was the one thing you expected to see on this screen that wasn't there?
- Did you feel like you had to scroll back and forth a lot of places, like it didn't belong?
- Did you have trouble understanding directions or explanations on this page? What did you think of them?
- How do you normally perform this task?
- Based on the previous task, do you prefer this way of doing the action or your normal way of doing it?
- Did you choose another way to do it? Why did you choose that way?
- How did you feel about the interface? What was going through your mind?
- What were you looking for on this page?
- What steps did you take to find it?
- Was [item] where you expected to find it?
- What was your overall impression of this screen/prototype?

Participants

Maria, John, Jane, Afjall, Kristina, Melissa, Anna, Richard, Robert, Oliva, Alex.

Metrics

- Time on page
- Success rate (Completion Rate)
- Error Rate

Script

Hello, [Moderator's name]. We're doing user research today to make sure the new Advisor Portal has what you need to do your job better. This is a moderated test, so we'll be talking throughout the session. We're not recording audio, but we're going to record the screen so we can review that later. If you have any questions, feel free to ask. We'll be using a script to guide our conversation, but we'll be as natural as possible. We'll be asking you to complete some tasks on the screen. Please keep in mind that any data you enter here is completely anonymous and won't refer to real people. As you're working, please speak out loud. This helps us understand your experiences better. The moderator will ask you questions about your thoughts and feelings. We'll be tracking your time spent on each task and the number of errors you make. Your thoughts are very helpful to us. This is going to be your opportunity to provide valuable feedback that will help us improve the portal. We'll be recording the conversation to make sure we don't miss anything. We'll be using a screen recorder to capture the conversation. Would you be okay with your call being recorded?

Do you have any questions before we start?

Participants

Pre testing questions: Add some background information on each participant captured as the session starts.

Tasks

Task 1 - Billings

Kristina: 45 sec

Melissa: 39 sec

Anna: 47 sec

Richard: 55 sec

Robert: 58 sec

Task 2 - Marketing Materials

Kristina: 15 sec

Melissa: 32 sec

Anna: 47 sec

Richard: 40 sec

Robert: 18 sec

Task 3 - Policy Documents

Kristina: 25 sec

Melissa: 47 sec

Anna: 23 sec

Richard: 12 sec

Robert: 16 sec

Task 4 - Policy Details Page

Kristina: 15 sec

Melissa: 32 sec

Anna: 47 sec

Richard: 23 sec

Robert: 12 sec

Task 5

Kristina: 25 sec

Melissa: 47 sec

Anna: 23 sec

Richard: 12 sec

Robert: 16 sec

Comments

We should tell the user's know blue that's a new version of SAP. It's a new feature. It's different and has more features. Encourage the user to try to explore and find what they're looking for instead of giving up. Encourage more narratives.

My final opinion is they should make GAP better. Instead of creating something new.

Quotes

Billing Page

Marketing Materials

Policy Documents

Client/Client Detail...

Overall comments

UX Perception

Responses

Positive things

Thoughts and ideas

Quotes

1. Filter Behaviours: Clicked on billing, didn't select bill type, don't use scroll, don't understand the task, navigation behavior, search behavior, relevance of the task, dropdown, positive feedback, newsletters, page wording/title, good feedback.

2. Familiarity with material: Familiar with material, task completion failed, navigation behavior, search behavior, relevance of the task, dropdown, positive feedback, newsletters, page wording/title, good feedback.

3. Clients Info: Clients info, clients list/search, looked for employee list, contact cards.

4. Benefits Card: Benefits card, clients info, clients list/search, looked for employee list, contact cards.

5. Employees / Premiums: Employees / premiums, reports, forms, homepage.

6. Forms: Forms were noticed, quotes were noticed and understood, marketing materials were noticed and understood.

Billing Page

Marketing Materials

Policy Documents

Client/Client Detail...

Overall comments

UX Perception

Responses

Positive things

Thoughts and ideas

Quotes

1. Filter Behaviours: Clicked on billing, didn't select bill type, don't use scroll, don't understand the task, navigation behavior, search behavior, relevance of the task, dropdown, positive feedback, newsletters, page wording/title, good feedback.

2. Familiarity with material: Familiar with material, task completion failed, navigation behavior, search behavior, relevance of the task, dropdown, positive feedback, newsletters, page wording/title, good feedback.

3. Clients Info: Clients info, clients list/search, looked for employee list, contact cards.

4. Benefits Card: Benefits card, clients info, clients list/search, looked for employee list, contact cards.

5. Employees / Premiums: Employees / premiums, reports, forms, homepage.

6. Forms: Forms were noticed, quotes were noticed and understood, marketing materials were noticed and understood.

Findings

Validations and discoveries

Findings

Positive feedback



- Most Advisors expressed **generally positive** sentiments about the site, calling it **intuitive and user-friendly**.
- Most tasks were **completed successfully** without major difficulties.
- Advisors were happy to see the **level of detail available** on the Client and Policy pages.
- The easy availability of **Reference Toolkits** was a popular feature.

Findings

Pain points



- Advisors generally had **difficulty finding flyers/documents**, with some expecting to find them among the documents for a specific policy.
- It was sometimes **hard to find page elements** due to the deep scrolling required.
- Some Advisors were **not used to the Client/Policy/Division hierarchy**, using different terminology.

Findings

Advisor needs



- Advisors expressed strong interest in the Reference Toolkits, but most said they **don't use flyers and brochures often**.
- The Advisors **use forms very frequently** and want easy access to them.
- Several mentioned that they **would like to see their clients' employees** in the portal.
- **Renewal dates** are very important to Advisors: they want this information easy to find, emphasized and used for organizational purposes.

Findings

UX observations



- Advisors **noticed the Forms button** on the navigation bar.
- Although we didn't devote a task to this, Advisors generally **noticed the Quotes section and immediately understood its purpose**.
- Several Advisors **compared the new portal to the current Group Admin Portal**, both favorably and unfavorably.

Findings

Homepage

News Carousel

- 3/6 found the section distracting.

Clients Card

- 6/6 loved the easy access from homepage, but they had different opinions about the prioritization.
- 4/6 prefer that this card sort clients by the soonest renewal date.

Quotes Card

- All the Advisors commented on and liked the at-hand availability of this section.

The screenshot shows the Medavie Blue Cross website homepage. At the top right, there are links for 'Forms', 'My Account', and 'Français'. Below the header, there's a navigation bar with 'Marketing Materials', 'Clients', 'Quotes', 'Billing', and 'Policy Documents'. The main content area features a 'Welcome, <name>' message. Below it is a news article card with a placeholder title '<In Focus Article Title>'. The card includes a summary of the article content, a 'Read More' button, and a 'See All News >' link. To the right of the card is a photograph of a family walking in a park. A yellow warning icon with an exclamation mark is overlaid on the top right corner of the image.

Welcome, <name>

<In Focus Article Title>

<This will be the body text of the news article. The intent is that this will still be the top paragraph, or summary of the news article content. Short and sweet is the name of the game here and we could allow another paragraph post break.

Like this to further describe the content of the article. This could be an in article link. For the full article the user would still need to click into the the actual article.

[Read More](#)

[See All News >](#)



My Business

Clients

Account Name	Policies	Lives	Current Annualized Prem.	Previous Annualized Prem.	
Always Chopping Inc	12	3,842	\$100,000	\$100,000	>
Automan Stan Garage	1	10	\$30,000	\$30,000	>
Jim's Garden Center	5	32	\$75,000	\$75,000	>
Marcie's Choice	10	100	\$250,000	\$250,000	>
Astro Widgets	5	15	\$35,000	\$35,000	>



[All Clients](#)

Quotes

Account Name	Type	Close Date	
Future Salon	Existing Group Marketing	Feb 2, 2024	>
Automan Stan Garage	New Group Sale	Feb 10, 2024	>
Jim's Garden Center	Existing Group Marketing	Feb 28, 2024	>
Marcie's Choice	New Group Sale	Mar 8, 2024	>



"It's basically, hey, look at the magazine, right? I don't think that's important when an advisor goes in. It's nice to see, if I've got time I can go there, but you're already wasting three quarters of the space by just saying, hey, this is our new Focus article... I like to get down to business. 90% of the time I won't read that."

[About the News articles](#)

"The news section, I find a bit of a distraction."

[About the News articles](#)

Library / Sales Resources

Page name

- Advisors don't think of these documents as related to sales or marketing. "Library" also wasn't a term they used.

Reference Toolkits

- Having the Reference Toolkits close at hand was a win with Advisors.

Newsletters

- 2/6 said they don't read the quarterly newsletter. A frequent comment was that they will only read this information once.

Find a Flyer

- Advisors found the volume of buttons in this card overwhelming, making it difficult to find the search button and results table.

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Marketing Materials Clients Quotes Billing Policy Documents

Marketing Materials

Reference Toolkits

- Benefits for Small Business
- Online Doctors
- Protection Plus
- EFAP

Newsletters

- Spring 2024
- Summer 2024
- Fall 2024
- Winter 2024

Find a Flyer

Enter a keyword, select a topic or both to find a flyer or manual.

Search

Topics

- About Medavie Blue Cross
- Digital Products
- Drug Solutions
- Fully Insured Group Products
- Health & Disability
- Member Experience
- Group Enrollment Material
- Voluntary Products
- Technology & Administration
- Wellness

Select all

Language

English French Bilingual

Reset

"I have the Reference Toolkits saved on my computer. This is something that I use a lot, so it will be good to have easy access. But I don't go back to newsletters. Usually I take a look when I receive them in my email and that's it."

[About Reference Toolkits](#)

"Would put newsletters at the bottom of the screen. It's not something that important to me."

[About newsletters](#)

"Never had to do this before. No idea where to go, not familiar with this process."

[About using flyers](#)

Client Details

Client info card

- Advisors were very happy with the details here.

Contacts card

- Though they were pleased to have this information, some Advisors didn't think this was the most logical place to put it.

Policies table

- When asked for feedback about this table, several Advisors said they'd like to see it include the policy's renewal date.

The screenshot shows the Medavie Blue Cross Client Details page. At the top right are links for 'Forms', 'My Account', and 'Français'. The main navigation menu includes 'Marketing Materials', 'Clients' (which is underlined), 'Quotes', 'Billing', and 'Policy Documents'. Below the menu, a breadcrumb trail shows 'Home / Clients / Client Details'. The main content area is titled 'Client Details' and features three cards:

- Coffee Company**: Shows 3 policies and 875 lives. Includes current and previous annualized premiums (\$10,772,304.29 and \$10,757,657.85). A large red heart icon is positioned to the right of this card.
- Contacts**: Lists account executive (Scott Richardson), work and mobile phones, emails, and account associate (Agatha Remmington) information.
- Policies**: A table listing three policies: Keurig (Policy Number 56234, Division 000), Nespresso (Policy Number 56235, Division 000; 001), and Ninja (Policy Number 56236, Division 000; 001). Each row has a blue 'View' link at the end.

At the bottom left is a 'Back' button. The footer contains the Medavie Blue Cross logo, a Canadian Association of Blue Cross Plans logo, and legal disclaimers. A large green thumbs-up icon is located on the right side of the page.

Client Details

Coffee Company

Policies: 3
Lives: 875

Current Annualized Premiums
\$10,772,304.29

Previous Annualized Premiums
\$10,757,657.85

Contacts

Account executive: Scott Richardson
Work phone: 506-777-888
Mobile phone: 506-777-888
Email: scott.richardson@medavie.ca
Other email: scott.richardson@medavie.ca

Account associate: Agatha Remmington
Work phone: 506-777-888
Mobile phone: 506-777-888
Email: Agatha.remmington@medavie.ca
Other email: Agatha.remmington@medavie.ca

Policies

Policy Number	Policy Name	Division
56234	Keurig	000
56235	Nespresso	000; 001
56236	Ninja	000; 001

Page 1 of 1

Back

Medavie Blue Cross is a member of the Canadian Association of Blue Cross Plans.
*Trade-mark of the Canadian Association of Blue Cross Plans. †Trade-mark of the Blue Cross Blue Shield Association. All rights reserved.

"I like the client details information. What is displayed here is very helpful."

[About Client Details](#)

Policy Details

Details card

- Advisors were very happy with the details here.

Contacts card

- Similar to the Client Details page, Advisors liked having this info but weren't sure why it was tied to a specific client.

Benefits

- 2 out of 6 advisors spontaneously suggested that they would like to see descriptions of the available benefits on the policy page.

Division

- Some Advisors used different terminology to the Client/Policy/Division hierarchy.

The screenshot shows the Medavie Blue Cross Client Details page with the following sections:

- Policy Details:** Shows a summary for "Keurig" with a red heart icon. Details include:
 - Policy number: 56234
 - Renewal anniversary date: March 28, 2026
 - Effective date: March 28, 2024
 - Current Annualized Premiums: \$25,430.65
 - Previous Annualized Premiums: \$24,039.34
 - Number of lives: 25
 - Industry / Category: Retail / Restaurants
 - Mailing address: 65 Rodeo Drive
 - Funding type: xyz
- Contacts:** Lists account executive (Scott Richardson), account associate (Agatha Remmington), and their contact information.
- Benefits:** Lists various benefit categories with icons:
 - Extended Health Care
 - Health Assessment
 - Member Life
 - Dental
 - Long Term Disability
 - Travel
 - Drug
 - Short Term Disability
 - Critical Illness
 - Hospital
 - Dependent Life
 - Member AD&D
- Division:** A table showing the division hierarchy:

Division Number	Division Name	Number of Lives	Current Annualized Premiums
0001	Atlantic Regional Div 1	25	\$25,430.65

Green thumbs up icons are overlaid on the Benefits and Division sections.

“It's really handy to have this easy access. Would be great if this were clickable and opened the policy booklet.”

[Benefits List](#)

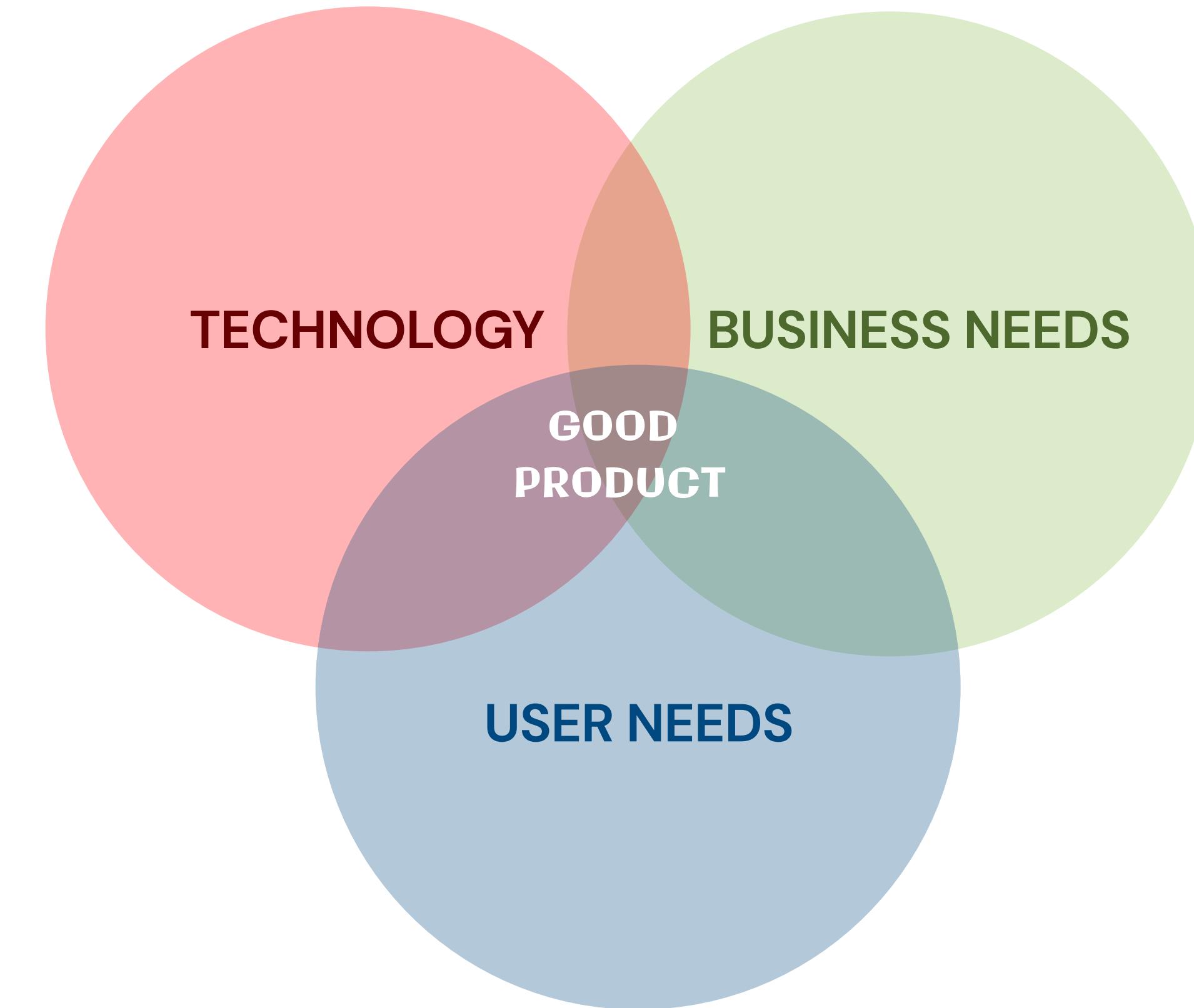
“Having the benefits list is really good information, because I don't have to go over the contract to see that.”

[Benefits List](#)

Recommendations

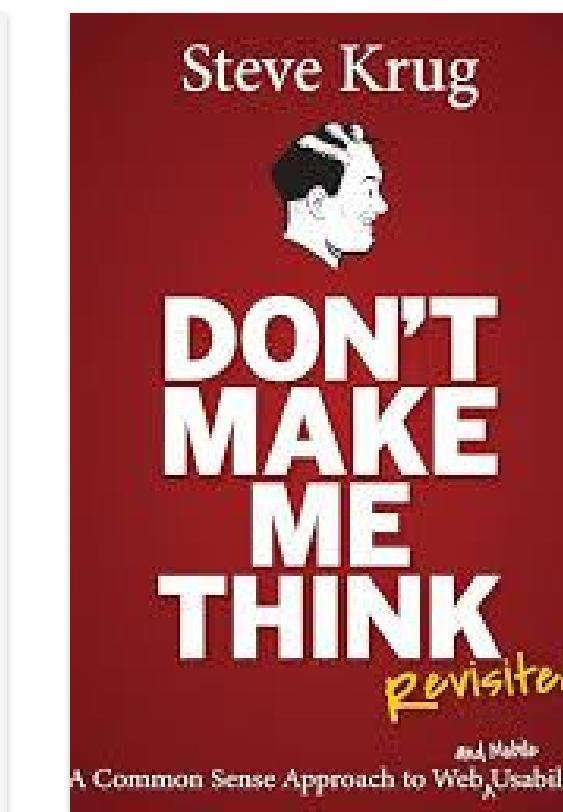
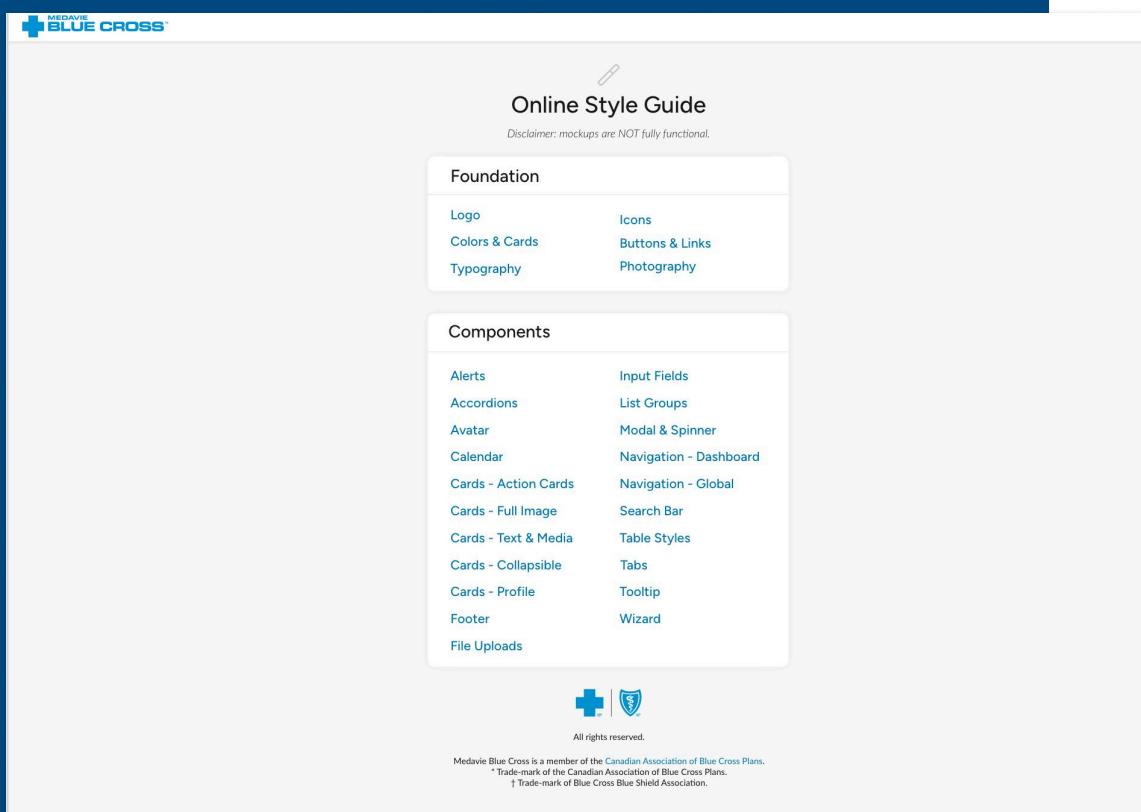
Acting on the data we've gathered

Product Strategy approach!



Intro

- Among our recommendations, we've highlighted **six easy wins** that we think have a clear benefit, can be easily agreed on, and won't require significant time to implement.
- Next, we've picked out **one page that needs more significant attention** and **one feature that requires better placement**.
- Finally, we identified **three new features** that could be considered for future iterations of the project.



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EASY WINS

Reorder menu navigation + add Forms

Since most Advisors said they rarely use the documents in the library, more commonly used functions should be prioritized. An always-visible link to Forms would also be useful.

Add renewal dates to Policy table

Several Advisors said it would be helpful to have this information at a glance in the Policy table for each client.

Change default sort on homepage cards

The Advisors broadly expressed the importance of renewal dates and several said they wanted the clients list on the homepage to be sorted by soonest renewal.

Rename the Sales Resources page

Advisors don't think of these documents as related to sales or marketing. A more general name like "Reference Materials" would better fit their mental model.

Remove Select All toggle from Policy Documents

Searching for all document types should be the default when neither or both are selected. The "Select All" toggle confused Advisors and slowed them down.

Combine Clients and Policies

Advisors typically think and work in terms of policies, not client accounts. Restructuring these pages would align our site to their workflow.

Reorder menu navigation + add Forms

1. Reports, Group Admin Portal and Forms button locations
2. Order of menu items



Since most Advisors said they rarely use the documents in the library, more commonly used functions should be prioritized.

An always-visible link to Forms, a high-usage feature, would be useful. As an external link, the Group Admin Portal button should be styled and grouped similarly.

Reasoning / Usability Rules

1. “Hamburger menu (or any form of hiding the navigation categories under a single menu) is not appropriate for desktop websites and apps. Out of sight means out of mind.”
2. Group utilities where people expect them: either in the top-right corner [...] this prominent placement makes them always visible, and, in general, easier to notice. We often see users looking in that area for tools, especially for items such as Log in, Search, and My Account or next to the content they affect.

Combine Clients and Policies

Reasoning / Usability Rules

1. Mental Model Law:

A compressed model based on what we think we know about a system and how it works. Match designs to the users' mental models to improve their experience. This enables them to easily transfer their knowledge from one product or experience to another, without the need to first take the time to understand how the new system works.



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Policies Quotes Billing Commissions Policy Documents Reference Materials

Home / Policies

Policies

Policy Number	Renewal Date	Lives	Account Name
212901893	March 28, 2026	151	Always Clean Inc
3483947	March 31, 2026	875	Coffee Company
5456578	April 05, 2026	253	Bakery Factory
3974940	April 15, 2026	100	Marcie's Choice
4957900	April 27, 2026	15	Astro Widgets
212901893	March 28, 2026	45	Always Chopping Inc
3483947	March 31, 2026	10	Automan Stan Garage
5456578	April 05, 2026	32	Jim's Garden Center
3974940	April 15, 2026	100	Marcie's Choice
4957900	April 27, 2026	15	Astro Widgets
212901893	March 28, 2026	45	Always Chopping Inc
3483947	March 31, 2026	10	Automan Stan Garage
5456578	April 05, 2026	32	Jim's Garden Center
3974940	April 15, 2026	100	Marcie's Choice
4957900	April 27, 2026	15	Astro Widgets
4957900	March 28, 2026	45	Always Chopping Inc
212901893	March 31, 2026	10	Automan Stan Garage
3483947	April 05, 2026	32	Jim's Garden Center
5456578	April 15, 2026	100	Marcie's Choice

FOCUS ITEM

Changes to Marketing Materials

- Name change.
- Place Reference Toolkits and newsletters side-by-side.
- Collapse the filter buttons into a single drop-down menu.
- Text search with no topics selected should search within all topics by default.
- Include a filter for audience in the search card.

The screenshot shows the MEDAVIE BLUE CROSS website's "Reference Materials" section. At the top, there are navigation links: Policies, Quotes, Billing, Commissions, Policy Documents, and Reference Materials (which is underlined). On the right, there are links for Reports, Group Admin Portal, and Forms. The main content area has two main sections: "Reference Toolkits" and "Newsletters". The "Reference Toolkits" section contains four items: "Benefits for Small Business" (with a briefcase icon), "Online Doctors" (with a doctor icon), "Protection Plus" (with a hand icon), and "EFAP" (with a laptop icon). The "Newsletters" section lists four issues: Spring 2024, Summer 2024, Winter 2024, and Fall 2024, each with a corresponding icon. Below these sections is a "Find a Flyer" search card. It includes a search input field, a magnifying glass icon, and dropdown menus for "Filter by Topic" and "Filter by Audience". There are also radio buttons for "Language: English", "French", and "Bilingual". Buttons for "Reset" and "Search" are at the bottom. The "Search Results" section shows a table with 13 rows, titled "Showing 1-13 of 13". The columns are: Document Name, Audience, Manual Section, Topic, and Type. Each row provides a link to a document and its file formats (PDF, CVS, XLSX). The "Type" column shows "All" for most rows and "Drug Solution" for the last one. A "Show All" button is located at the top right of the search results table.

Document Name	Audience	Manual Section	Topic	Type
Automated Step Therapy - Member Flyer	Member	Plan Management Features	Drug Solution	PDF CVS XLSX
Automated Step Therapy - Plan Sponsor Flyer	Plan Sponsor	Plan Management Features	Drug Solution	PDF CVS XLSX
Biosimilars Management - Member Flyer	Member	Plan Management Features	Drug Solution	PDF CVS XLSX
Biosimilars Management - Sales Flyer	Plan Sponsor	Plan Management Features	Drug Solution	PDF CVS XLSX
Mandatory Generic Substitution - Member...	Member	Plan Management Features	Drug Solution	PDF CVS XLSX

EASY WINS – PROPOSAL

Combine Clients and Policies

- Eliminate the Clients page.
- Policies are surfaced first, instead of nesting deep in a hierarchy.
- The policy page includes the client name and details.
- Advisors can search by policy number on the Policies page.
- “Contact” re-labeled “MBC Contact” to clarify relationship.

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Policies Quotes Billing Commissions Policy Documents Reference Materials

Home / Policies / Policy Details

Policy Details

Policy number: 83543

Policy name : QC Bakery
Renewal anniversary date: March 28, 2026
Effective date: March 28, 2026

Current Annualized Premiums
\$535,340.21

Previous Annualized Premiums
\$470,407.93

Number of lives: 151
Industry / Category: Services / Laundry
Mailing address: 65 Rodeo Drive
Funding type: xyz

Client: Bakery Factory

Total Policies: 5
Lives: 253
Current Annualized Premiums (All Policies)
\$378,158.22
Previous Annualized Premiums (All Policies)
\$374,638.18

MBC Contact

Account associate: Agatha Remmington
Work phone: 506-777-888
Mobile phone: 506-777-888
Email: Agatha.remmington@medavie.ca
Other email: Agatha.remmington@medavie.ca

Benefits

	Extended Health Care		Health Assessment		Member Life
	Dental		Long Term Disability		Travel
	Drug		Short Term Disability		Critical Illness
	Hospital		Dependent Life		Member AD&D

Division

Division Number	Division Name	Number of Lives	Current Annualized Premiums
000	Always Clean	142	\$512,260.1
001	Dry Cleaner	9	\$23,080.11

FOCUS ITEM

Changes to Marketing Materials

Reasoning / Usability Rules

1. Cognitive Load Law

When the amount of information coming in exceeds the space we have available, we struggle mentally to keep up — tasks become more difficult, details are missed, and we begin to feel overwhelmed.

• Filters – NNgroup

Selecting good categories that will truly be helpful for users in your targeted domain is one of the ways in which specialized websites can provide superior user experience relative to bigger and more generalized sites like Amazon.com. One size definitely doesn't fit all when it comes to supporting niche user needs. A deep understanding of these needs comes from detailed user research, which is more likely to be done by companies serving a narrow domain than by companies with broad product offerings.

- Filters are useless if people don't understand what they mean. Remember that many of your users know far less about the details of your products or content than you do.

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Policies Quotes Billing Commissions Policy Documents Reference Materials

My Account Français Reports Group Admin Portal Forms

Reference Materials

Reference Toolkits



Benefits for Small Business



Online Doctors



Protection Plus



EFAP

Newsletters



Spring 2024



Summer 2024



Winter 2024



Fall 2024

Find a Flyer

Enter a keyword, select a topic or both to find a flyer or manual.

Search



Filter by topic

Language:

English

French

Bilingual

Reset

Search

All

About Medavie Blue Cross

Digital Products

Drug Solutions

Fully Insured Group Products

Group Enrollment Material

Health & Disability

Member Experience

Technology & Administration Upgrades

All

Member

Plan Sponsor

Advisor

Plan Sponsor & Advisor

Plan Sponsor & Member

Solution

PDF CSV XLSX

Solution

PDF CSV XLSX

Drug Solution

PDF CSV XLSX

Search Results

Showing 1-13 of 13

Document Name	Audience	Type
Automated Step Therapy - Member Flyer	Member	PDF CSV XLSX
Automated Step Therapy - Plan Sponsor Flyer	Plan Sponsor	PDF CSV XLSX
Biosimilars Management - Member Flyer	Member	Drug Solution
Biosimilars Management - Sales Flyer	Plan Sponsor	Drug Solution
Mandatory Generic Substitution - Member...	Member	Drug Solution
Maximum Allowable Cost (MAC) - Standar...	Plan Sponsor	Drug Solution
Medication Advisory Panel (MAP) - Info Sheet	Plan Sponsor	Drug Solution
Patients First Network - Info Sheet	Plan Sponsor	Drug Solution

USER EXPECTATIONS

Employee listings

Almost all the Advisors expected that the portal would let them see their clients' employees. At least one Advisor told us that ours is the only portal that doesn't offer this.

Plan usage reports

Several Advisors spontaneously shared that this would be an important and useful feature for the portal to offer.

Thank you!