Subscription enrollment for various users

Role / Skills	UX Designer / Product Thinking
Contribution	Designed the overall flow and high-fidelity wireframes for all types of enrollment (B2C & B2B) for CarePass
Team	Myself, UI Designer, Content Strategist, 2 Front-End Developers, 2 Back-End Developers, 2 QA Developers, 1 PM
Duration	2021 July – September
Platform	Web & App

Context

In 2021, CVS was focused on increasing online subscriptions to its membership program, CarePass. The company pursued two strategies:

(1) Business-to-Consumer (B2C) with increased marketing (online, in-app, and thru email)

(2) Business-to-Business (B2B) with partnerships with insurance companies to offer CarePass as part of their packages

This was to be done in phases. An MVP for the B2C, all cases for B2C, then the B2B flows.

B2C User Requirements

To sign up for CarePass online, there are three requirements for the user:

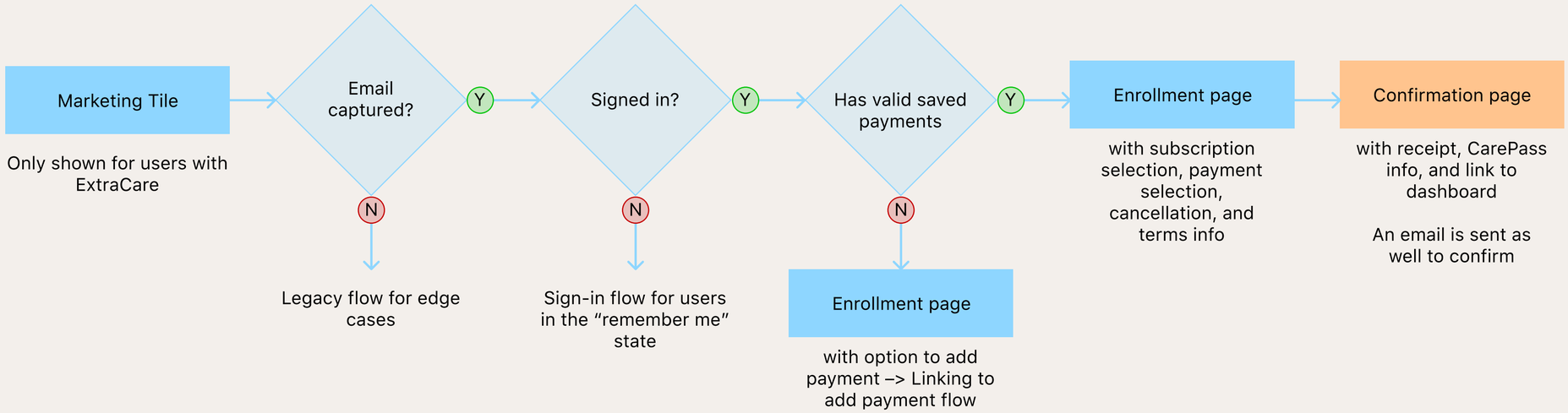
(1) A CVS account
(2) An ExtraCare card (used for CVS’ coupon program)
(3) Valid form of payment

For the first iteration, we focused on an MVP, where we handled users with at least an ExtraCare card and an email which they used to sign up.

B2C MVP App Flow

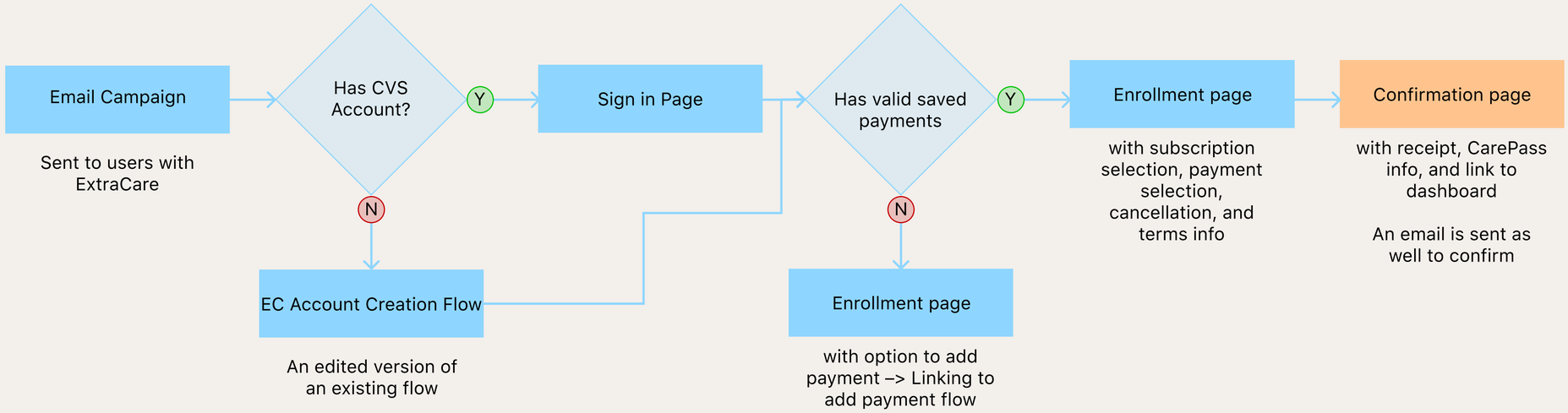
For users of the app, an account is required. We could also see if they had an ExtraCare card or not.

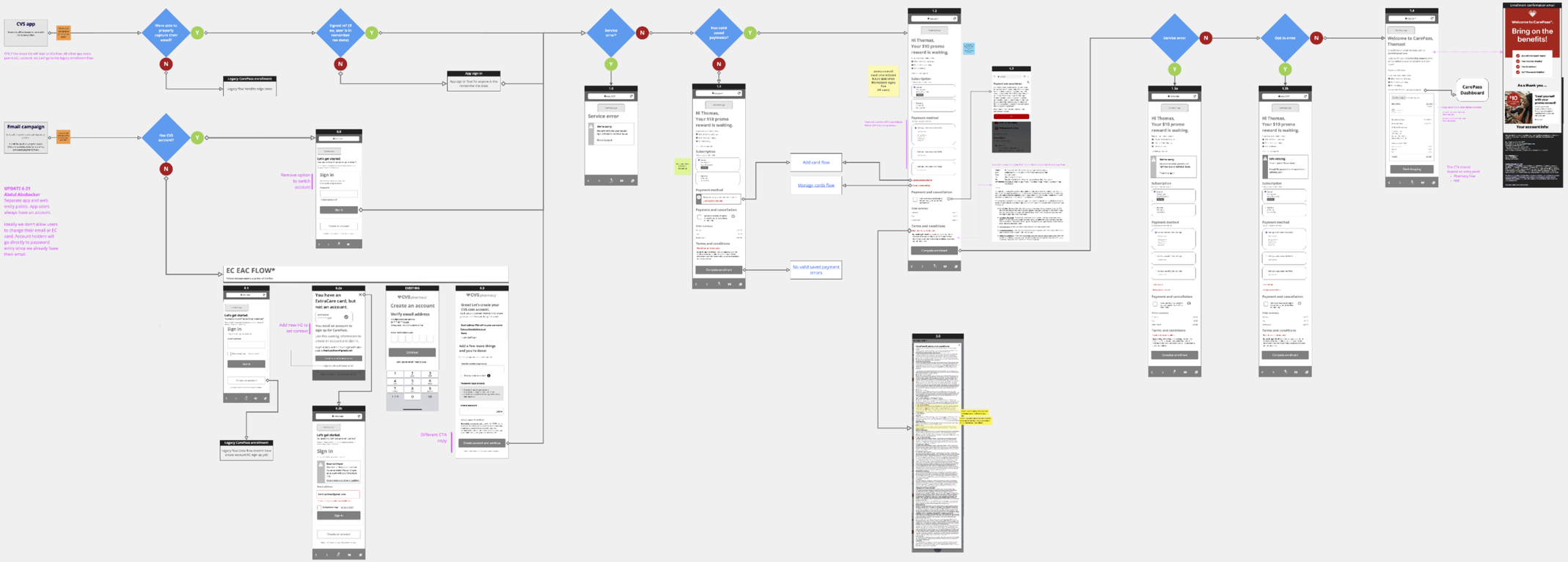
Therefore, we could target app users WITH ExtraCare and an account. All we had to do was add a flow for users without a valid payment.



B2C MVP Web Flow

For online users, we could send out emails to people with ExtraCare, which already required email. If this email was associated to an account or payments, those could be carried over, and if not we needed to provide flows to account for lack of account or payments.





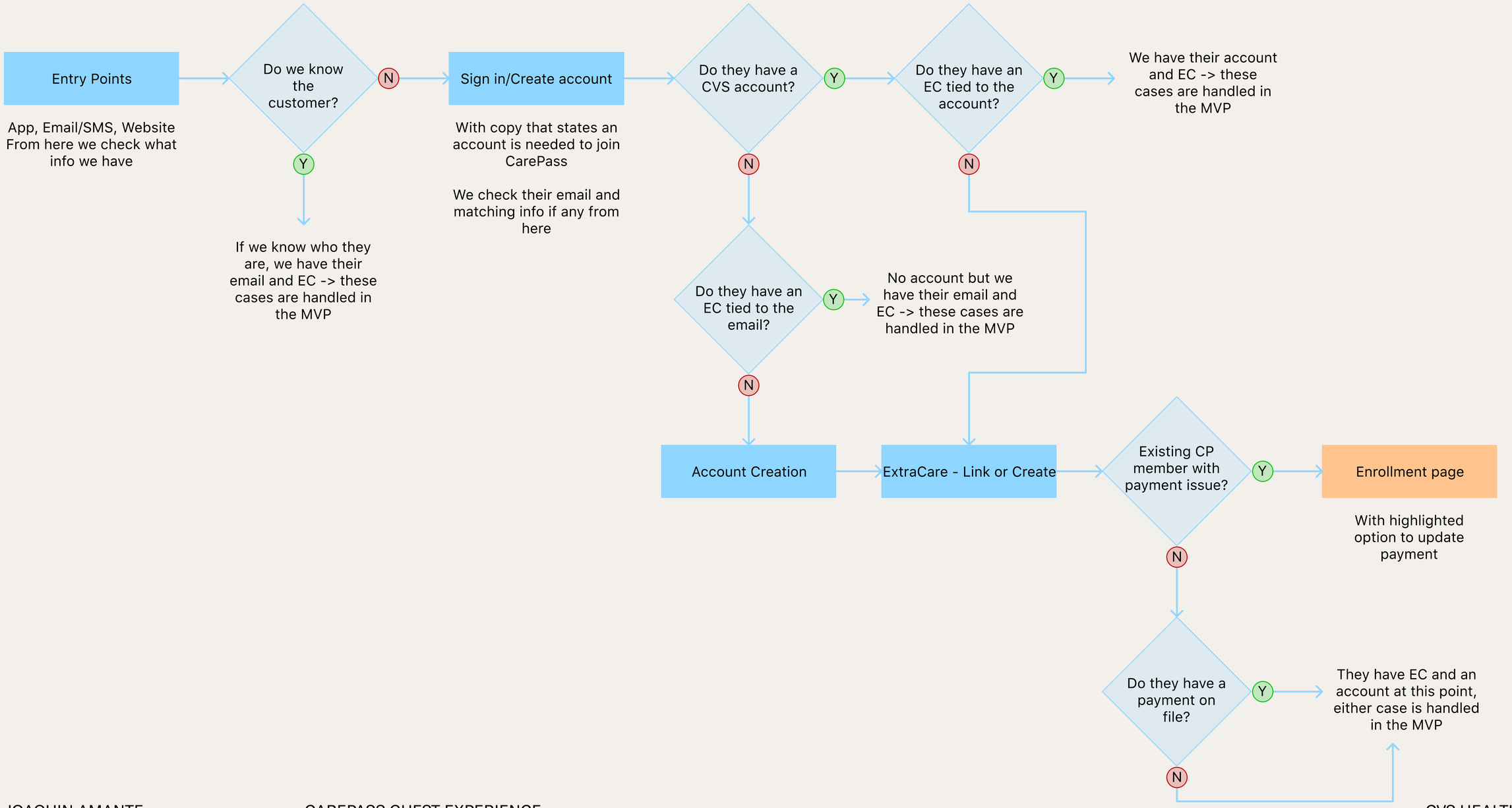
TBD

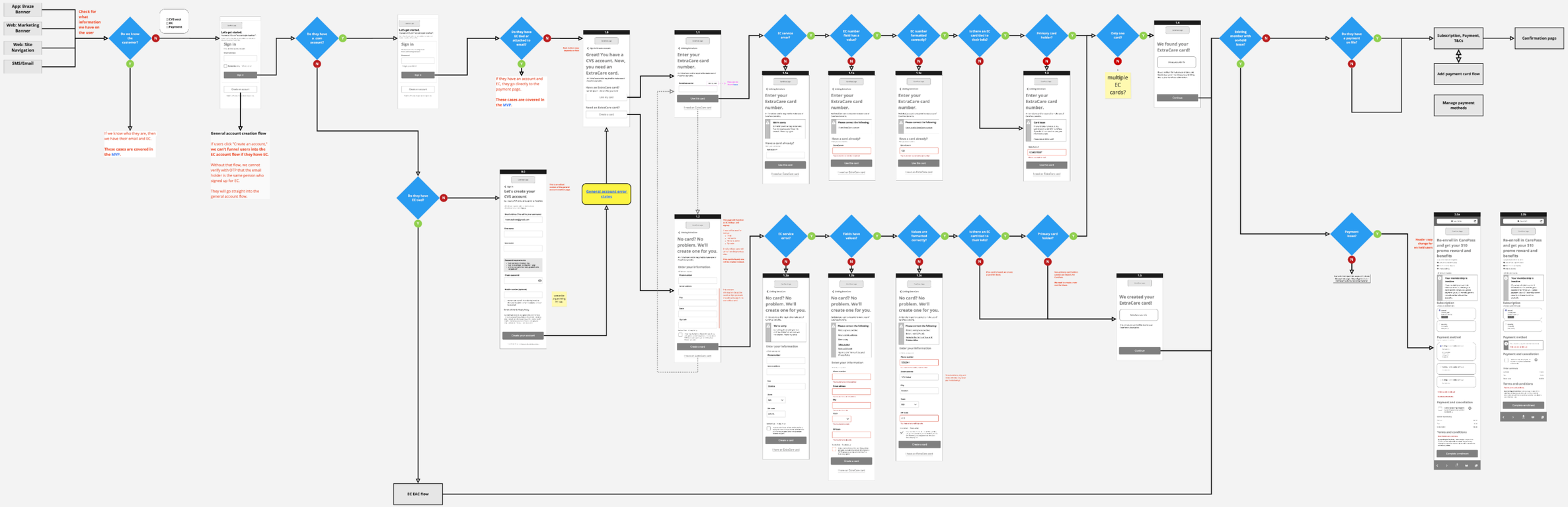
- Legal consent
  - Payment and cancellation modal
  - Terms and conditions checkbox
  - Add card legal auth

Beyond the B2C MVP

In the MVP phase, we handled cases where we knew who the customer was, namely thru their email and ExtraCare card number.

Without any information, we had to check if:
(1) They had a CVS account
(2) They have an ExtraCare card (possible with or without an account)
(3) They had a payment on file (although this flow was already mainly handled thru the MVP and another concurrent project to revamp our payment flows)


Entry Points
App, Email/SMS, Website
From here we check what info we have
Do we know the customer?
N
Y
If we know who they are, we have their email and EC -> these cases are handled in the MVP
Sign in/Create account
With copy that states an account is needed to join CarePass
We check their email and matching info if any from here
Do they have a CVS account?
Y
N
Do they have an EC tied to the account?
Y
N
We have their account and EC -> these cases are handled in the MVP
Do they have an EC tied to the email?
Y
N
No account but we have their email and EC -> these cases are handled in the MVP
Account Creation
ExtraCare - Link or Create
Existing CP member with payment issue?
Y
N
Enrollment page
With highlighted option to update payment
Do they have a payment on file?
Y
N
They have EC and an account at this point, either case is handled in the MVP



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CAREPASS GUEST EXPERIENCE

CVS HEALTH

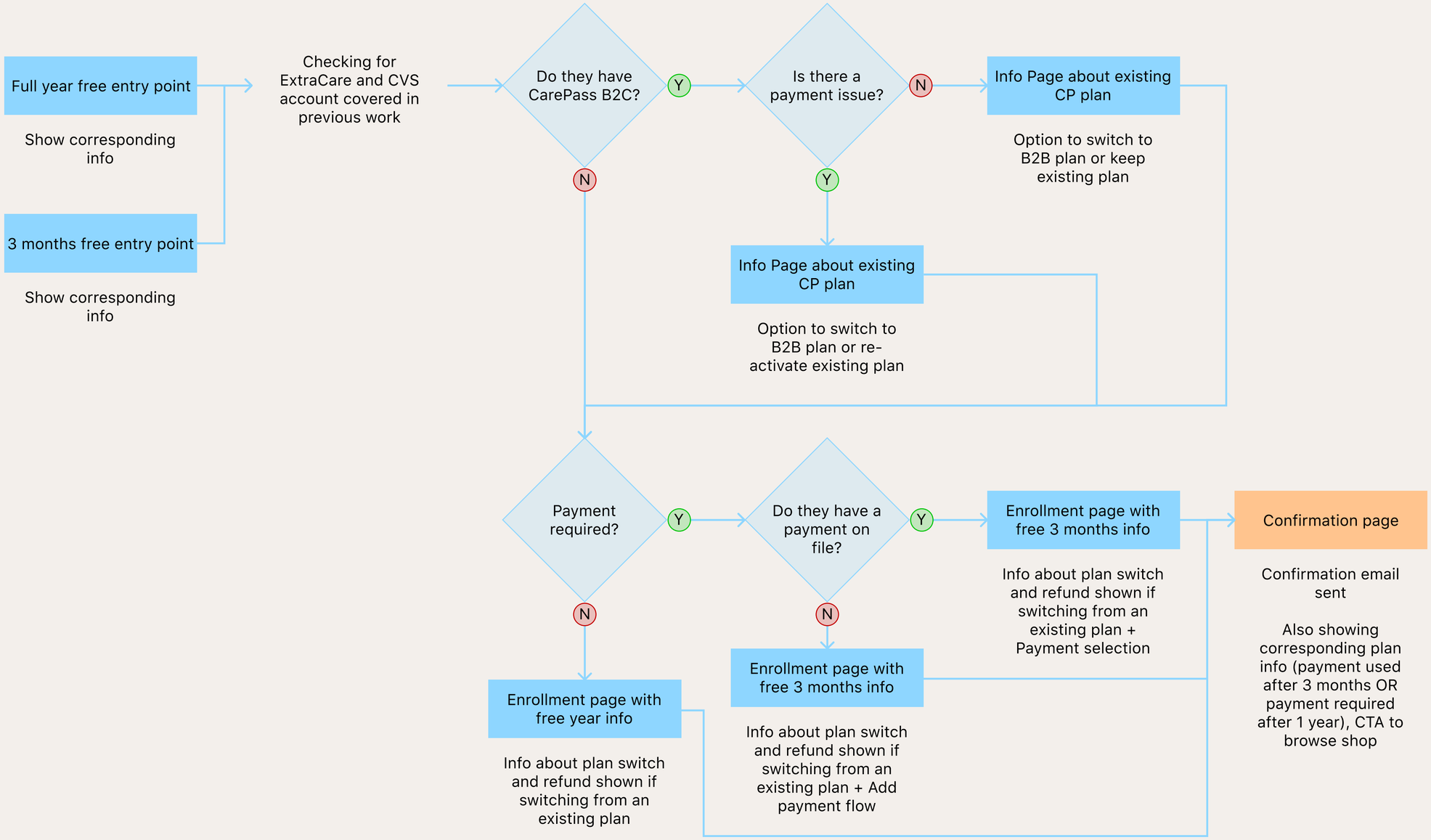
B2B Work

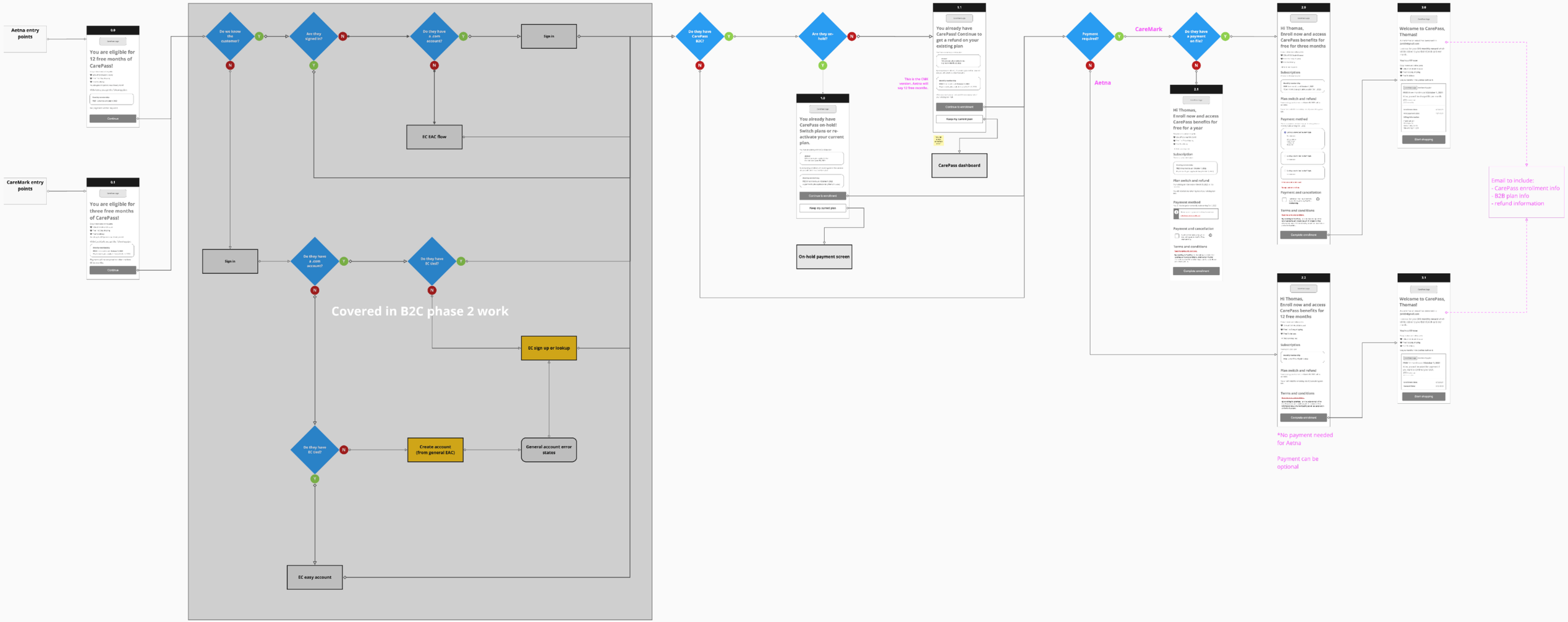
Now with all cases for enrollment covered for the average costumer, we had to make edits to our existing flow to service customers signing up for CarePass thru our partnerships with insurance companies.

There were two possibilities based on the insurance plans, a free full year, or three months free with monthly payment required after.

In these cases, any instance of the customer not having a CVS account or an ExtraCare card were already covered in our previous B2C work.

We simply had to provide the appropriate options and have the corresponding info on the payment pages.


Full year free entry point
Show corresponding info
3 months free entry point
Show corresponding info
Checking for ExtraCare and CVS account covered in previous work
Do they have CarePass B2C?
Y
Is there a payment issue?
N
Info Page about existing CP plan
Option to switch to B2B plan or keep existing plan
N
Y
Info Page about existing CP plan
Option to switch to B2B plan or re-activate existing plan
Payment required?
Y
Do they have a payment on file?
Y
Enrollment page with free 3 months info
Info about plan switch and refund shown if switching from an existing plan + Payment selection
Confirmation page
Confirmation email sent
Also showing corresponding plan info (payment used after 3 months OR payment required after 1 year), CTA to browse shop
N
N
Enrollment page with free year info
Info about plan switch and refund shown if switching from an existing plan
Enrollment page with free 3 months info
Info about plan switch and refund shown if switching from an existing plan + Add payment flow


Aetna entry points
0.0
You are eligible for 12 free months of CarePass!
Continue
CareMark entry points
0.1
You are eligible for three free months of CarePass!
Continue
Do we know the customer?
Are they signed in?
Do they have a .com account?
Sign in
EC EAC flow
Sign in
Do they have a .com account?
Do they have EC (sef)?
Covered in B2C phase 2 work
EC sign up or lookup
Do they have EC (sef)?
Create account (from general EAC)
General account error states
EC easy account
Do they have CarePass B2C?
Are they on-hold?
1.0
You already have CarePass on-hold! Switch plans or re-activate your current plan.
Continue to enrollment
Keep my current plan
On-hold payment screen
1.1
You already have CarePass! Continue to get a refund on your existing plan
Continue to enrollment
Keep my current plan
This is the CMK version, Aetna will say 12 free months.
CarePass dashboard
Payment required?
Aetna
CareMark
Do they have a payment on file?
2.1
Hi Thomas,
Enroll now and access CarePass benefits for free for a year
Subscription
Plan switch and refund
Payment method
Payment and cancellation
Terms and conditions
Complete enrollment
2.0
Hi Thomas,
Enroll now and access CarePass benefits for free for three months
Subscription
Plan switch and refund
Payment method
Payment and cancellation
Terms and conditions
Complete enrollment
3.0
Welcome to CarePass, Thomas!
Start shopping
Email to include:
- CarePass enrollment info
- B2B plan info
- refund information
2.2
Hi Thomas,
Enroll now and access CarePass benefits for 12 free months
Subscription
Plan switch and refund
Terms and conditions
Complete enrollment
3.1
Welcome to CarePass, Thomas!
Start shopping
*No payment needed for Aetna
Payment can be optional

Conclusion

It took a whole quarter’s worth of work to prepare all the flows and wireframes for this project. These were all handed to our content strategists and UI designers to finalize the details. For this project, I worked very closely with the developers to understand the scenarios that needed to be covered.

Concurrently in this quarter, my time also revamped our payment flows to have an adaptable system-wide flow that could be used throughout our system.

Overall, I learned a lot in reworking legacy systems built separately in order to unify the different solutions built previously.