Hypergrowth Downmarket Case Management V1 - Product Requirements Document

Text	**Summary**

Competitive Landscape

Description. However, most tools:

- Weakness 1
- Weakness 2

AS Competitive Advantage:

- Advantage 1
- Advantage 2

User Personas

Primary Users:

- Employees
- HR Teams
- IT
- Finance

User Personas

"Planning Patricia"

- Pregnant employee at a mid-size company
- Wants to understand leave options 3-6 months before due date
- Confused by overlapping FMLA, state leave, and STD policies
- Wants visual timeline to coordinate with partner and plan finances
- Anxious about job security and benefits continuation

3. The Problem

Problem Statement: Navigating leave planning and accommodations is a complex, often confusing journey due to the intertwined nature of laws, policies, and personal circumstances. These challenges form barriers that make informed decision-making difficult for employee during critical life events.

- **The leave and entitlement landscape is highly complex and situational:** The interplay between federal, state, local, and employer policies creates a confusing patchwork of rules where eligibility, job protection, and pay differ based on factors like location, reason for leave, work history, and timing. Without support, employees and HR teams struggle to understand how policies interact, what time and pay is available, and what requirements must be met in each case.

- **Employees don't know what type of leave or accommodation applies to their situation:** Most employees don't know what they need to request or what is available to them (ex. parental, bonding, health conditions, intermittent, accommodations) based on their life event and often misclassify their leave and accommodation needs today creating manual work for HR teams managing leave requests.
- **Confusion about what time is paid, unpaid, or job-protected:** Employees often assume qualifying for leave means getting paid, and overall lack clarity on how employer pay, state benefits, and unpaid time work together.
- **No upfront visibility into how policies stack or interact:** Employees want to model scenarios (e.g., PTO + state leave + STD) and understand total time, pay, and job protection to plan for their leaves. They also want to understand how to order and/or stack different types of leaves in a way that is advantageous to them.
- **Rigid systems don't handle combined leave + accommodation needs:** Real-world cases like pregnancy often require both accommodations and leave, but current tools don't guide employees through blended support paths.
- HR pain point 1
- HR pain point 2

Employees need to:

1. **Explore leave options** for anticipated life events without triggering formal requests
2. **Understand policy interactions** (how FMLA, state leave, and benefits stack)
3. **Visualize leave timelines** showing paid vs. unpaid periods and job protection
4. **Determine eligibility** based on their specific employment situation
5. **Plan financially** by understanding wage replacement percentages and gaps

HR needs to:

- Need 1
- Need 2
- Need 3
- Need 4

The Solution

- Feature 1
- Feature 2

- Feature 3

Leveraging AI

AI is essential for this solution because:

1. **Natural Language Processing** enables employees to describe situations in their own words rather than regulatory terms
2. **Dynamic Questioning** adapts the flow based on state, leave type, and user responses
3. **Contextual Guidance** provides relevant information without overwhelming users
4. **Explainable Decisions** shows which inputs drove eligibility determinations

In Scope vs. Out of Scope for V1 June Build

	In Scope	Out of Scope
Functionality	• **Leave intake** – guided conversational UX to submit leave requests and upload documentation, with an option to use a traditional form instead. • **Employee dashboard** – displays active and past leave requests, shows leave types, timelines, required tasks, and pay/benefit impact. • **HR dashboard** – allows administrators to view and sort cases, see eligibility determinations and required tasks for each case with timelines, and manually approve, request additional info, or reject cases. • **Rules engine** – deterministic engine applying federal, state,	• PTO and sick day accrual tracking. • Payroll calculations and disbursement. • Metrics and analytics for HR.

	and select local regulations to determine eligibility, entitlements, and required documentation. • **Self-service sign-up and billing** – customers create accounts, select plan size, enter payment information, and subscribe. **Security and compliance** – ensure data protection, role-based access control, and audit trails. • **Accessibility** – meet WCAG 2.1.	
Policies	• All Federal and state policies • 13 key municipal policies • Employer-specific benefit plans • Union and CBA policies	• LTD and STD policies that are not state entitlements • ADA (Americans with Disabilities Act) eligibility/entitlements • PWFA (Pregnant Workers Fairness Act) accommodations • Workers' compensation leave • Vacation and all sick leave policies

Nice To Haves:

- Affordances for PWFA and ADA applicability (can be lite)
- Policies: Military leave (USERRA), Jury duty, Voting leave, Bereavement leave
- Multi-language support

V1 — Downmarket Case Management (June 2026)		
Employee Stories		
Title	**User Story**	**Detailed Acceptance Criteria**
Platform Access	As an employee, I can create an account, so that I can access the system.	• User can initiate account creation from a sign-up page or invitation link. • User must be able to enter required fields (e.g., name, work email, password). • Password must meet system-defined security requirements. • System verifies the email domain or identity (e.g., via email confirmation or SSO). • User receives a confirmation email or success message once the account is created. • User is redirected to login upon successful account creation. • System prevents duplicate account creation using the same email. • Error messages are displayed for invalid inputs or failed registration attempts.

Onboarding	As an employee, I can go through an onboarding process as a first time user, so that I know how to use the system.	• On first login, user is automatically taken to an onboarding flow.
		• Onboarding includes a sequence of guided steps explaining:
		  ◦ How to use the conversational UI to ask questions. These questions may be about leave, or about how to use the system itself
		  ◦ How to submit a request
		  ◦ An example of the request dashboard that is shown after a request is made

		• User can skip or exit onboarding at any time. • Onboarding progress is saved so the user can resume if exited early. • After completing onboarding, the user is taken to the main dashboard. • Returning users do not see the onboarding flow unless they manually access it. • User receives a confirmation message when onboarding is complete.
Request Submission	As an employee, I can submit a leave request and upload required documents via a conversational interface, so that I can take a leave of absence.	• User can send and receive messages via the conversational interface. • The conversation prompts for all required information (leave type, dates, reason category, etc). For questions with binary answers (dates, yes/no questions, etc.) the user is offered clickable icons as a way of answering, while also being able to send a message conversationally. • The system clearly states when limitations apply and/or if the user is asking about something not included in the compliance engine. • Conversation history is stored for future reference (optional depending on privacy rules). • User can upload one or more required documents during the conversation. • The system validates file types and size limits for uploaded documents. • User can modify answers during the conversation before final submission. • System automatically saves progress so the user can return later.

		• Once all required questions have been completed, the system will present an overview of the request before prompting the user to confirm that they are ready to submit their request. The user can edit all information in the overview without leaving the page. • Once submitted, the system generates a case. • User receives confirmation via email and/or text that the request was submitted successfully. • Errors or missing information are flagged and explained clearly.

Request Dashboard	As an employee, I can view a dashboard showing my current leave requests, their statuses, timelines, and tasks, so that I understand my leave request and what the next steps are.	• User can access the dashboard from the main navigation.
		• Dashboard lists all past and current leave requests.
		• Each leave request displays status (e.g., open, submitted, pending review, approved, denied).
		• Upon clicking any given case, the user can view a dedicated page to that case.
		• The dedicated case page includes the following:
		  ◦ General overview of the request. Leave type, number of days, continuous vs. intermittent, etc.
		  ◦ A timeline view that shows key milestones, deadlines, and upcoming events.
		  ◦ Tasks required of the user are clearly shown with due dates.
		  ◦ Impact that this leave has on pay and benefits.

		• Data displayed is updated in real time.
Complete Tasks	As an employee, I can upload additional documentation after my request has been submitted, so that I can complete the required tasks on time.	• User can view required tasks and timelines via the dedicated case page, and can upload documents to complete requests when required. • Accepted file formats and size limits are clearly communicated. • System shows upload progress and confirms when the file has been successfully saved. • User can view previously uploaded documents. • Tasks automatically update their status upon file upload.
Notifications	As an employee, I can receive notifications and reminders about upcoming tasks and deadlines so that I don't forget to complete my tasks.	• System can send notifications for upcoming due dates, required documents, or status changes. • Notifications are delivered via user-configured channels (email, SMS, or in-app). • User can configure notification preferences. • Reminder frequency follows the following cadence: 5 business days, 24 hours before, day-of, 1 day overdue, increments of 5 days overdue until tasks are completed). • Notification messages contain clear instructions and relevant links. • System only sends reminders for tasks that are incomplete. • Notification history is viewable in the system.
Request Changes	As an employee, I can request an extension or change to my leave, so that I can take the time	• Employee can see an option to modify their leave in the case view page.

	I need as my circumstances change.	• System prompts employee to specify the type of change (extension, earlier return, schedule change, or intermittent frequency change). The user will have a similar experience as the initial leave request with the hybrid conversational/form view. • Employee can enter updated dates and/or hours. • System will request additional documentation depending on the type of change. This decision is generated deterministically via the compliance engine. • Employee can upload supporting documentation as part of the modification request. • System creates a new change request record linked to the original case. • HR is notified of the requested change. • Change request appears in employee's dashboard with a "pending review" status. • System prevents invalid changes (e.g., requesting a change to a closed case). • Employee receives a confirmation once HR approves or denies the change. • All changes and decisions are logged for compliance auditing.
Return to Work	As an employee, I can view and complete return-to-work requirements, so that I can come back smoothly.	• Employee can access their return-to-work requirements from their dashboard or case page.
Self-Service Help	As an employee, I can access self-service help with the	• User can access a "Help" page from the main navigation.

	system, so that I can troubleshoot on my own.	• The help page includes searchable and browsable topics. • At any point during the conversational experience, the user can request help with using the system. The system will respond with links to specific help topics and/or in-line instructions. If a conversational help request cannot be processed, the system responds with a fallback message and directs the user to the help page and also provides an HR contact.
Update Profile	As an employee, I can update my profile, so that the system has accurate data.	• User can access a "Profile" page from the navigation menu. • Profile page displays the following editable fields: phone, address, and preferred notification method(s) (email and/or text). • User can save changes and receive a confirmation message.
HR Administrator Stories		
Platform Access	As an HR administrator, I can create an account, so that I can access the system.	• User can initiate account creation from a sign-up page or invitation link. • User must be able to enter required fields (e.g., name, work email, password). • Password must meet system-defined security requirements. • System verifies the email domain or identity (e.g., via email confirmation or SSO). • User receives a confirmation email or success message once the account is created. • User is redirected to login upon successful account creation.

		• System prevents duplicate account creation using the same email. • Error messages are displayed for invalid inputs or failed registration attempts.

Onboarding	As an HR administrator, I can go through an onboarding process as a first time user, so that I know how to use the system.	• On first login, user is automatically taken to an onboarding flow.
		• Onboarding includes a sequence of guided steps explaining:
		  ◦ How to use the conversational UI to ask questions. These questions may be about leave, or about how to use the system itself.
		  ◦ An example of the case dashboard with dummy cases.
		  ◦ An example of the case view and all of its components, including how to process that case from end-to-end.
		• User can skip or exit onboarding at any time.
		• Onboarding progress is saved so the user can resume if exited early.
		• After completing onboarding, the user is taken to the main dashboard.
		• Returning users do not see the onboarding flow unless they manually access it.
		• User receives a confirmation message when onboarding is complete.

New Employees	As an HR administrator, I can add new employees to the system, so that they can request a leave if they need one.	• Admin can navigate to an or “Employee Management” section that includes an “Add Employee” button. • Admin can manually add an employee by entering required fields (name, email, and manager).

		• Admin can bulk upload employees via CSV or HRIS sync, if enabled. • System prevents adding duplicate employees. • Newly added employees automatically receive an invitation to login. • Admin receives a confirmation when the employee is successfully added.
Conversational UI	As an HR administrator, I can ask questions about leave regulations through a conversational interface, so that I ensure I am in compliance.	• The system recognizes regulatory and policy-related questions that are included in the compliance engine. • System provides deterministic answers based on the employee, their work location, their leave history, and leave type. • System can provide citations, summaries, or step-by-step compliance explanations. • Admin can ask clarifying questions or request examples. • Conversation history is stored for future reference (optional depending on privacy rules). • The system clearly states when limitations apply and/or if the user is asking about something not included in the compliance engine.
Case Dashboard	As an HR administrator, I can view and sort all open and closed cases, so that I can access the case I need.	• User can access a case list dashboard showing all cases. • Case cards display key metadata (employee name, leave type, status, start date, assigned case manager, and priority). • User can filter cases by status (open, closed, pending), leave type, date, or assignee.

		• User can sort by date request submitted, status, priority, and next upcoming task deadline. • Search function allows quick lookup. • Case list automatically refreshes when updates occur.
Case Assignment	As an HR administrator, I can assign cases to myself or n+1 case manager, so that the workload is distributed appropriately.	• User can view unassigned cases at the top of the dashboard and assign a case manager to each by dropdown or search, without leaving the page. • System provides notification to assignee via email and in-app, and reflects it on the case dashboard. • Admin receives confirmation of successful assignment.
Case View	As an HR administrator, I can view a dedicated page for each case, so that I can view the details and required tasks of each.	• User can click into any case from the dashboard. • Case page includes: employee details, leave type, timeline of key dates, status, eligibility and entitlement results, uploaded documents from the employee, and a task list with due dates for each item. • Page shows activity and change history. • Case page updates in real time with new data or tasks.
Eligibility and Entitlement	As an HR administrator, I can review eligibility and entitlement determinations generated by the rules engine in the case view, so that I can make decisions that are in compliance.	• Eligibility and entitlement deterministically generated based the compliance engine. • User can view the results in a clear, structured summary (e.g., employee is entitled to XYZ due to hours worked, tenure, ABC state law, etc.). • Admin can send messages via the conversational UI embedded in this

		section to ask questions the results.
Case Tasks	As an HR administrator, I can see a list of required tasks and documentation in the case view, so that I can process each case on time and in a compliant manner.	• Case page includes a task list generated deterministically based on the compliance engine. • Each task includes a description, due date, responsible party, and status. • Tasks update automatically when completed or when employee actions are submitted. User can also manually mark tasks as completed. • Required documents show upload status (complete, pending, overdue). • System alerts the user about upcoming or overdue tasks via email and in-app notification. Reminder frequency follows the following cadence: 5 business days, 24 hours before, day-of, 1 day overdue, increments of 5 days overdue until tasks are completed).
Approve or Reject	As an HR administrator, I can approve or reject leave requests manually in the case view, so that the employee receives a decision for their request.	• User can click an approve or reject button to process a case. System requires a written notes for rejection. • User can override the entitlement determination (if permissions allow) with a required justification. • All approvals, rejections, and overrides are logged for compliance auditing. • Decision triggers and notification to the employee and updates the request status in the system.
Request Additional Info	As an HR administrator, I can request additional information from the employee on an open case in the case view, so that I have all of the information and	• User can initiate a request for additional info on any given task that the employee was responsible for completing.

	documentation I need to process a request.	• The system will prompt the user to specify the reason for the request, which the user can input their answer to via the conversational UI. • Based on the user's input, the system will generate an email template, which can be edited directly on the page, and then sent when ready. • All requests for additional info are logged for compliance auditing.
Company and Union Policies	As an HR administrator, I can upload a copy of my company's leave policies and/or a copy of a collective bargaining agreement, so that the system can triangulate these documents with the rules engine when adjudicating an employee leave request.	• User can navigate to a "Policies" page via the sidebar. • User can upload one or more documents in PDF, DOCX, or TXT formats. • System validates allowed file types and size limits before upload. • System provides visual real-time upload progress and a confirmation upon successful upload. • Uploaded documents appear in a list with metadata (file name, type, upload date, uploader). • User can replace or update previously uploaded documents. • User can delete or archive old policy documents, subject to audit logging requirements. • All document uploads, modifications, and deletions are logged with timestamps and user ID. • User can view previously uploaded documents directly within the browser. • The rules engine automatically incorporates the uploaded

		policies/CBA into eligibility & entitlement determinations. • When relevant policy/CBA text influences a determination, the system can link or cite it within the user's eligibility review. • System flags potential conflicts between statutory rules and company/CBA rules and prompts HR for manual resolution. • Updated or replaced documents trigger a re-processing flag and re-evaluation of active cases, which the user is notified of.
IT/Security Stories		
Role-Based Access	As an IT administrator, I can manage role-based access controls, so that we ensure privacy for employees.	• User can access a permissions management section. • System supports predefined roles: employee, HR administrator, HR case manager, IT administrator, and finance administrator. • User can view a complete list and filter users by role. • User can change user roles directly on list via dropdown next to each name. Each user can be assigned multiple roles.
Secure Storage	As an IT administrator, I can have secure storage and transmission of medical documentation and personal data, so that we ensure privacy for employees.	• Not too sure on this one.
Finance Stories		

Self-Service Pay	As a finance manager, I can register my company for AbsenceSoft and pay for it with my credit card via self-service, so that we can use the system.	• User can navigate to a self-service company registration page via the AbsenceSoft website. • User is prompted to enter required company information prior to payment (we need to define what these things are). • User can pay by credit card. • System automatically provisions a new company workspace after payment is accepted. • User receives an onboarding email containing login instructions.
Subscription Management	As a finance manager, I can view billing information and subscription status, so that I can make updates if needed.	• User can access a dedicated billing and subscription page. • Page displays: current subscription plan, billing cycle, next billing date, payment method(s) on file, current balance or amount due, billing address, and invoice history. • User can download invoices. • User can update subscription plan from free to paid or vice versa, payment methods, and billing address. • User can view a list of the differences between free and paid plans. • User can transfer responsibility to another colleague in the event they leave their role. • User can cancel subscription. • User receives a confirmation email upon any changes to the subscription.
AbsenceSoft Stories		
	As AbsenceSoft's product management team, I can	

	monitor customer usage of our net new products, so that I can understand what is valuable and where we need to make improvements/pivot.	
Post V1 - 2026 Work		
Title	**User Story**	**Detailed Acceptance Criteria**
Metrics and Analytics	Story	• Criteria 1
Automated Leave Processing		

HR UI brainstorm

The nav menu will have links to three pages:

- Dashboard
- Case Management
- Users

Dashboard page:

- This is the page the user is brought to by default
- There are three cards: active leaves, open requests waiting on employee, open requests waiting on HR, and upcoming leaves. Each card shows the number of cases with that status. When the user clicks each card, they are brought to the case management page in the list view, with the list filtered to show cases with the status that matches the card they clicked on. Clicking the active leaves card will show a list that only shows cases with the “on leave” status, clicking on open requests waiting on employee card will show a list that only shows cases with the “waiting on employee” status, clicking the open requests waiting on HR card will show a list that only shows cases with the “waiting on HR” status, and clicking the upcoming leaves card will show a list that only shows cases with the “pending leave start” status.
- There is a conversational UI for the AI assistant underneath the cards. The user can attach files for the AI assistant to reference within that chat

Case Management page:

- This page is a list of all leave cases
- Cases can be viewed as list or grid

- Cases can be sorted
- Can be filtered by leave type, leave stage, or department. User can also search to filter
- List view has 6 columns from left to right: name, status (waiting on HR, waiting on employee, pending leave start, on leave, closed), date of next upcoming deadline, frequency (continuous or intermittent), leave start, return date
- The card view has the following information on each card: name, status (waiting on HR, waiting on employee, pending leave start, on leave, closed), date of next upcoming deadline, frequency (continuous or intermittent)
- When the user clicks a case, an overlay appears from the right. That overlay includes the following information: employee name, leave type, status, date of leave start, date of leave return, what the pending action item(s) are and when they are due, files related to the case that have been uploaded (which the user can click to view within the program or they can download the file), and a button to view the dedicated case page. There is an X at the top right that the user can click, and then the overlay disappears and the user is brought back to the base case management page
- Each case has it's own dedicated page, which the user access by clicking the view dedicated case page on the overlay. That dedicated case page includes the following information: employee name, email, phone number, their manager, their department, leave type, status, date of leave start, date of leave return, frequency (continuous or intermittent, and if intermittent there is a description of what the cadence is), a list of all required notices, forms, other action items, the due date for each, the status of each, and who is responsible for each, and files related to the case that have been uploaded (which the user can click to view within the program or they can download the file)

Users page:

- This page is a list of all employees
- The list can be sorted
- The list can be filtered by role or department. User can also search to filter
- List view has 5 columns from left to right: employee name, email, department (engineering, product, marketing, finance, or sales), role (employee or HR), and status (active or inactive)
- The user can click any name on the list and they are brought to a dedicated page on that person. That dedicated page includes the following information: employee name (can be edited in line, and is separated into two free text boxes, one for first name and one for last name), email (can be edited in line), phone number (can be edited in line), their manager (can be edited in line), their department (engineering, product, marketing, finance, or sales. This can be edited in line via a dropdown list), their start date as an employee (can be edited via a pop up calendar), their last day of employment (if applicable; can be edited via a pop up calendar), their status (active or inactive. This can be edited in line via a dropdown list), their role (employee or HR. This can be edited in line via a dropdown list), and a

list of the employee's history of leaves of absence (each item on the list has the leave type, start date, and end date). When the user clicks a leave in the employee's leave history, it will take the user to the dedicated case page as described previously (meaning, the same page that the user can access from the list on the cases page)
- At the top right is a button the user can click to add a new user. When the user clicks that, they are brought to a new page. That page asks for the user to input the following information: employee first name (free text), employee last name (free text), email (free text), role (dropdown with two options: HR or employee), and department (dropdown with the following options: engineering, product, marketing, finance, or sales). There is a create user button that the user can click when they are done

Policies page:

- The user can upload a file that includes their company policies or collective bargaining agreements with unions. If they do so, eligibility and entitlement calculations will include not just federal, state, and local law (which is what happens by default); it will also include company policies and/or collective bargaining agreements to create a fuller picture for HR and the employee. This page should make that clear to the user. The file upload does not need to actually work for the purpose of the prototype
- The user can view company policies and collective bargaining agreements with unions that were previously uploaded (which the user can click to view within the program or they can download the file)

Subscription page:

- User can update their subscription. For the purpose of the prototype, the user will already be subscribed. The cost of the subscription is $3.00 per employee per month, with an annual subscription required. There are two things the user can do on this page: cancel their subscription, turn auto-renew on or off, and add additional seats for when they hire new employees.

Employee UI brainstorm

The nav menu will have links to 4 pages:

- Home
- My Leave Requests
- Help
- My Profile

Home page:

- Includes an embedded conversational UI with the AI assistant where the user can ask questions or begin a leave request. The user can upload files into that chat. For the purpose of the prototype it does not need to work.

- Under the conversational UI the user will see one card or button for each leave type that is available: parental, medical, caregiver, bereavement, military. In theory the user can click each button and they will be taken directly into a leave request for that leave type, but for the purpose of the prototype we don't need that to work. The affordance of each card or button should be clear and easy to understand; e.g., if I click this button I can begin a request for parental leave, if I click that button I can begin a request for some kind of medical leave, etc.

My Leave Requests page:

- The user will see an overview and current status of any pending requests, which should include the following: leave type (parental, medical, caregiver, bereavement, military), frequency (continuous or intermittent, and if intermittent there is a description of what the cadence is), start date, return to work date. Parental leave will have 4 sub-types; the user should see which one applies to the. Those sub-types are: adoption, maternity vaginal delivery, maternity c-section, and paternity (non-adoption)
- The user will see a visual map of the leave plan in a Gantt chart style, where the user can see the beginning and end of their leave, which types of leave they are taking in what order, and the start and end of each leave. e.g., Someone on parental leave may be taking state covered leave for 12 weeks, and then after that a fully covered company leave for 6 weeks
- A list of tasks required to fully process a leave request, a due date for each, and who is responsible for completing each. When the user clicks each task, more detail of what that task is and what specifically needs to be done appears via an accordion interaction. There is a clear visual indication of which tasks are complete and which ones are not. For those that are complete, the date of completion will show
- The impact of this leave on pay and benefits. For example if the user is taking state covered parental leave, they may be receiving 85% of their weekly pay with max of $2,000 biweekly for 12 weeks. The user should see the actual amount of money they will be paid biweekly and how that compares to their usual biweekly pay. For benefits, 401(k) contributions, employer pension contributions, paid leave accruals, and ancillary insurance are generally all paused by law during a leave, and health insurance coverage generally always continues by law during a leave. This should be clearly communicated to the user
- The user can view all documents that have been uploaded by them or HR for that case (which the user can click to view within the program or they can download the file)
- The user has the ability to edit existing requests. The things the user can edit are: the start date of their leave, their return to work date, the order of leave types if they are taking multiple within one request (e.g. if someone is taking state covered parental leave and company covered parental leave), and the leave type (the only leave type that can be edited is the sub-type of parental leave; for medical, caregiver, bereavement, and military the user cannot edit the leave type)
- The user can see a history of past leaves, with the start date and return to work date of each being visible. If the user were to click each leave, it theoretically take them to an overview of that previous

leave, but for the purpose of this prototype it does not need to do that

Help page:

- Includes an embedded conversational UI with the AI assistant where the user can ask questions about how to use the product. The user can upload files into that chat. For the purpose of the prototype it does not need to work.
- The user will see FAQs. For the purpose of this prototype we do not need to have actual questions and answers here; we can just have placeholders. I think an accordion interaction is likely the best way to organize the information in this section, but I am also open to other ideas
- The user can search for help articles. For the purpose of the prototype, this does not need to work

My Profile

- The user will see the following information: employee name, email, phone number (can be edited in line), their manager, their department (engineering, product, marketing, finance, or sales), their start date as an employee, and their communication preferences (two options; email and text. Email cannot be turned off, but the user can toggle text on or off)

Risks and Assumptions

Assumptions:

- Assumption 1

Risks:

- Risk 1

Mitigation Strategies:

- Mitigation 1

Validation and Testing Strategy:

1. **Separate Testing Cohorts:**
    - Initial training: 100 scenarios across common leave types
    - User acceptance testing before release:
        - test scenarios not used in training
2. **UAT Accuracy Testing:**
    - test scenarios not used in training
    - Work with AS internal teams to:
        - Verify eligibility determinations against manual calculations
        - Validate entitlement against manual calculations
    - Test edge cases and policy interactions

- Verify decision factors are clearly shown
- Test natural language understanding accuracy

3. **User Experience Testing:**
    - Comprehension of projections vs. guarantees
    - Completion rates and drop-off points
    - Clarity of visual timelines
    - Verify decision factors are clearly shown

Success Metrics:

How do you also measure the outcome you want to truly measure and know that you are differentiating?

1. Metric 1
2. Metric 2

9.3 North Star Metric

Employee Confidence Score: Self-reported confidence in understanding leave options (pre vs. post tool usage), measured by survey input.

Launch Criteria:

- 95% accuracy on eligibility determinations
- 90% accuracy on entitlement calculations
- 80% user comprehension of projection disclaimers
- 60% session completion rate

Go To Market

Positioning for Marketing Team

Internal Stakeholders:

External Communication:

Rollout Strategy

Open Questions

Question	DRI
Question 1	