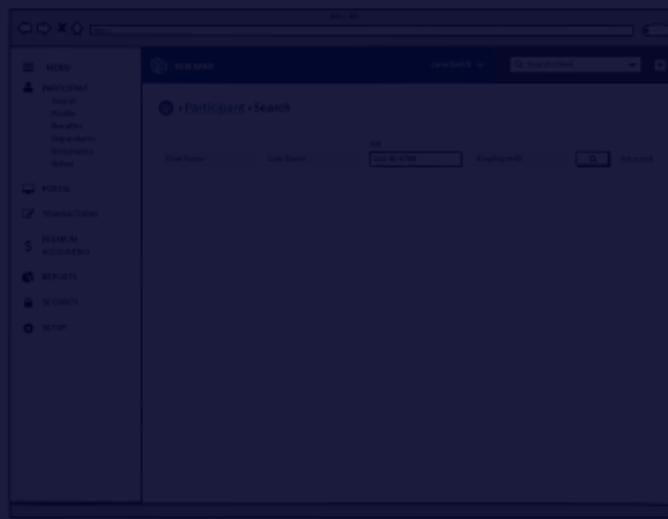
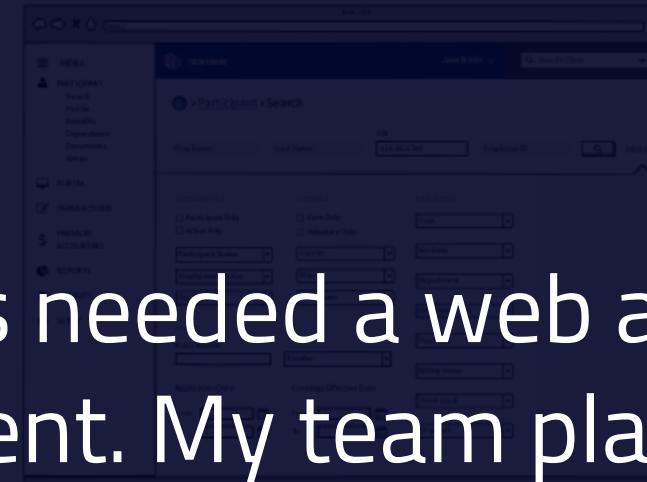


Case Study UI for Benefits Admins



Search (home / dashboard page default?)

Advanced Search (3 columns + right section)

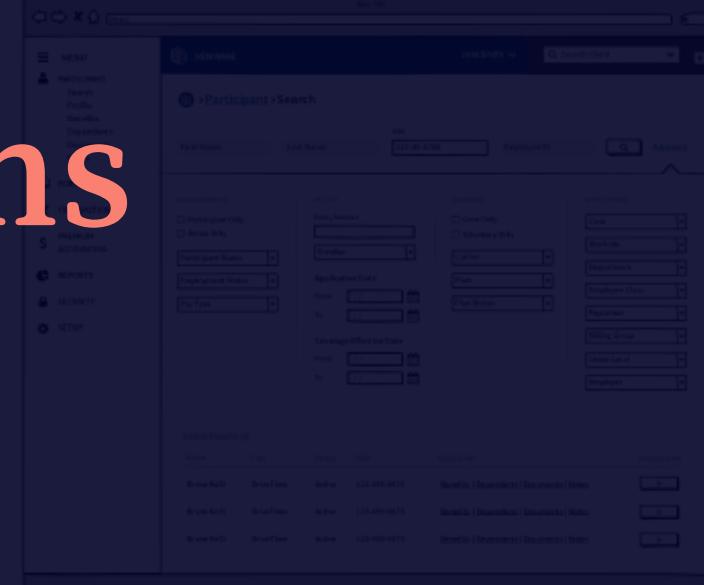


Advanced Search (4 columns + bottom section)

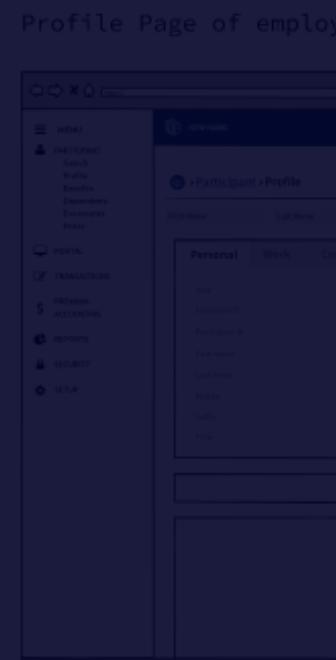
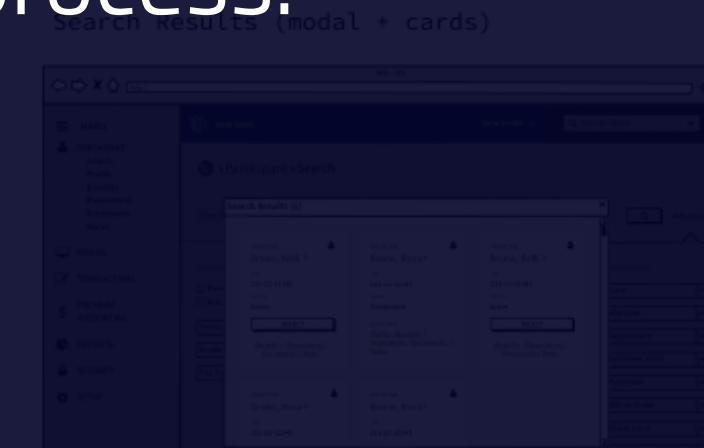
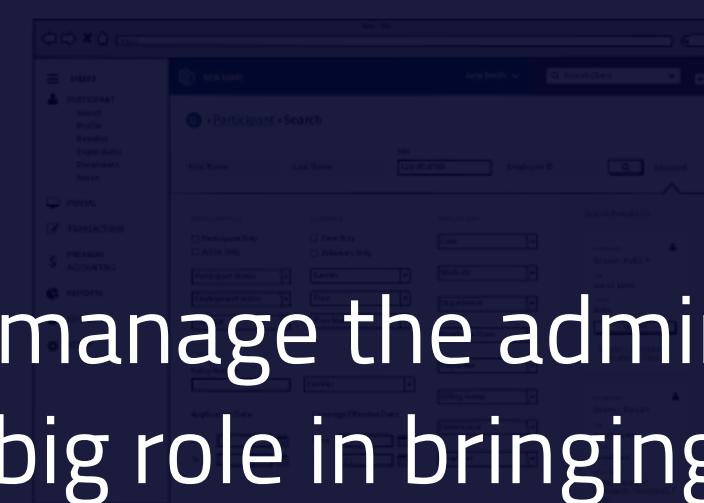


Advanced search section expanded (2 options)

Search Results (4 columns + table)



Search Results (3 columns + cards)



Winston Benefits needed a web app to manage the admin side of benefits enrollment. My team played a big role in bringing it to life. Here's a behind the scenes look at my process.

Robin Zheng (robinsdesk.github.io)

Wireframes

Rough sketches based on the requirements I was given and feedback I collected from super users in the company.

In this phase, layouts are kept barebone, as we mapped out how we want people to navigate the application. At this stage, I tried and tested many variations of the Benefits tab and search results.

As you'll see later, many of the elements shown here made it to the mockups stage.

Personal Work Contact Last Census (12/15/17) 

SSN 999-99-999 	First Name Kelli	Full Address 1050 S. LONGMORE DR. #45 MESA, AZ 85202
Last Name Brune		
Employee ID 999999999 	Participant ID 999999999	DOB 07/12/1990
Employee Class Active PT	Contact Id 2733903	Age 56
Benefits Eligible	Middle --	Gender F
	Suffix --	Marital Status --
	Title --	Ethnicity --

Status      

Benefit Plans (6) 			 \$71.49 TOTAL	
Type	Name	Coverage	Effective Date	Per Pay
	TRADITIONAL PLAN	Brune, Kelli (EE) Brune, Patrice Brune, Tom	01/01/2017	\$56.75
	CLASSIC HIGH		01/01/2017	\$13.33
	VISION	<u>Employee + Family</u>	01/01/2017	\$1.41
	EMPLOYEE SUPPLEMENTAL LIFE	<u>Employee Only</u>	01/01/2017	0

DRIVETIME 

Brune, Kelli 	
SSN 321-23-1245	
STATUS Active	
	

DRIVETIME 

Brune, Kelly 	
SSN 123-34-1265	
STATUS Retired	

DRIVETIME 

Brune, Kelli 	
SSN 321-23-1245	
STATUS Active	
	

DRIVETIME 

Brune, Kell	
SSN 321-23-1245	
STATUS Active	
	

User Flows

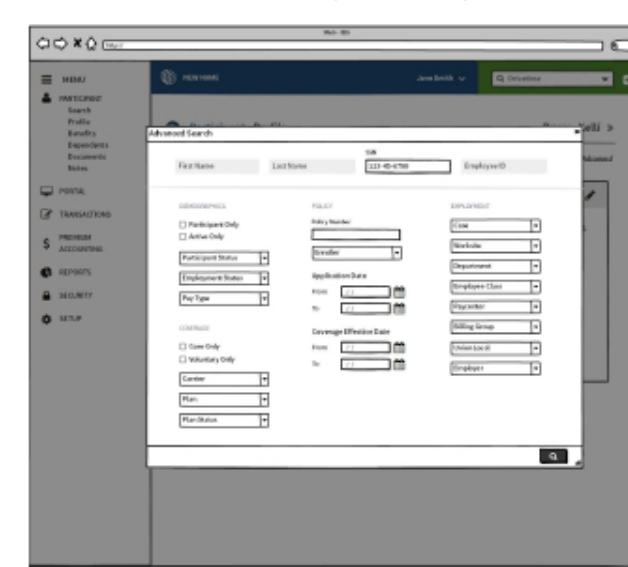
I made user flows like these to figure out how parts of the application related to others.

This example is the search feature. From early feedback, we knew that most users only need 2-3 fields to look up employee profiles in the system.

This diagram I made shows almost every scenario, how users can swap from a '**quick search**' to '**advanced search**' screen based on their need.

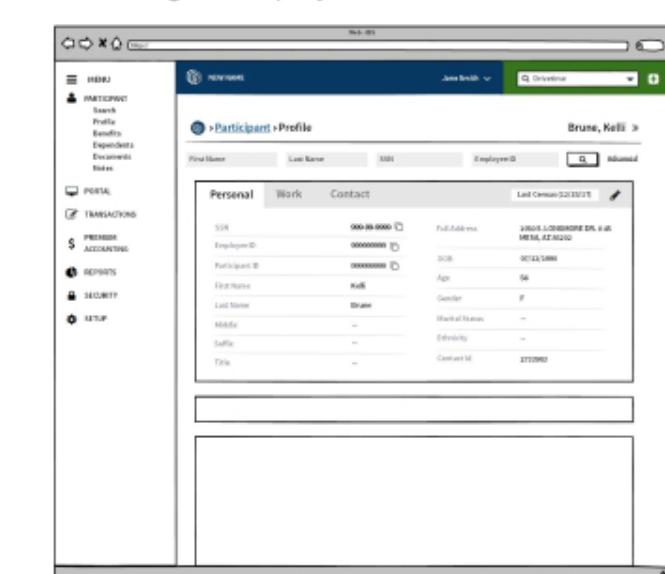
Quick search using only SSN, EEID, and/or Name

Advanced search modal (3 columns)



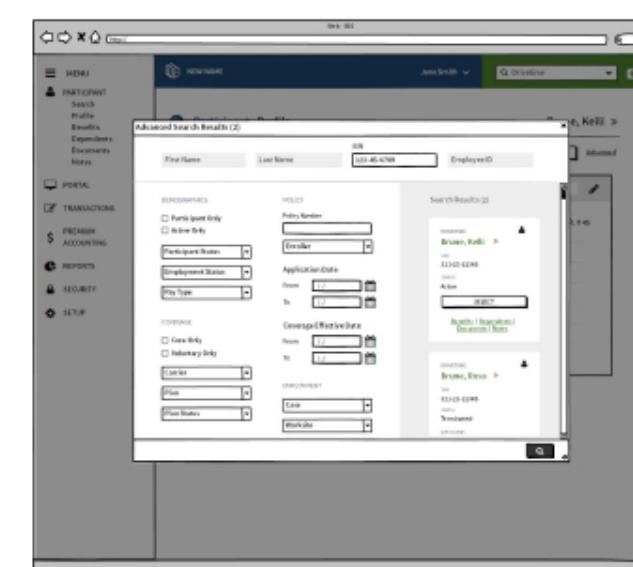
A wireframe of an advanced search modal window. It has three main columns: DEMOGRAPHICS, POSITION, and COMPENSATION. The DEMOGRAPHICS column contains fields for Gender, Marital Status, and Contact ID. The POSITION column contains fields for Policy Number, Employee ID, Application Date, and Coverage Effective Date. The COMPENSATION column contains fields for Pay Type, Grade, Pay Rate, and Plan Status. There are also sections for VOLUNTARY ONLY and INVESTMENT.

Profile Page of employee B



A wireframe of a profile page for employee B. It includes sections for Personal (SSN, Employee ID, Participant ID), Work (Full Address, Office, Age, Gender, Marital Status, Contact ID), and Contact (Mobile, Email, Title). A sidebar on the left lists navigation items: Home, PARTICIPANT, Search, Profile, Benefits, Expenses, Documents, Items, PORTAL, TRANSACTIONS, PREMIUM ACCOUNTING, REPORTS, SECURITY, and SETUP.

Multiple search results (2 columns + cards)



A wireframe showing search results. On the left is the Advanced search modal. On the right, there are two cards displaying search results for 'Brune, Kelli' and 'Brune, Ross'. Each card shows the employee's name, SSN, and a 'View' button.

Style Guide

I put together a live Figma doc used by the product and dev team. We chose practical web fonts and colors, limiting bright colors to clickable buttons / icons.

Flexibility was the goal. Unlike people signing up for benefits, admin users care about getting tasks done fast and accurate.

Leadership wanted to white-label this app for HR clients eventually. So this had to work for all kinds of brands, not just the default Winston skin.

Headline 1 Regular 24pt

Headline 2 Bold 24pt

Subheader 1 Bold 18pt

Subheader 2 Thin 21pt

Secondary label 1 Bold 14pt

SECONDARY LABEL 2 Bold 14pt

Body 1 Regular 16pt

Body 2 Thin 16pt



#FAFAFA

Page BG



#999

Gray 4



#0072CE

Primary Blue 1



#F2F2F2

Gray 1



#666

Gray 5



#2F80ED

Primary Blue 2



#DEDCDC

Gray 2



#444

Gray 6



#4E9499

Tertiary Green



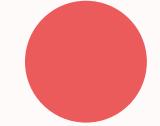
#CCC

Gray 3



#22C795

Positive Status



#EB5B5B

Negative Status

Components

I made sure we had pixel-perfect examples of basic components and states. They became UI designers' building blocks and the dev team's source of truth.

Cards and tables fit for how we wanted data to stack. But the downside was, these design were **limited by the front-end framework**. The trade-off for rich, data-heavy features was that we could only control a component's surface level styles (color, border), not behavior.

The image displays a grid of UI components:

- Top row: Four buttons labeled "BUTTON". The first is white with blue text, the second is grey with black text, the third is teal with white text, and the fourth is teal with white text.
- Second row: A "PRIMARY" button (white with blue text) and a "SECONDARY" button (teal with white text). To their right is a "Dropdown" button with a dropdown menu open, showing three options: "Option 1", "Option 2", and "Option 3".
- Third row: Four small square buttons with three dots (...).
- Fourth row: Two checkboxes. The first is empty and labeled "Checkbox", the second is checked (blue outline) and labeled "Checkbox".
- Fifth row: An input field with a lock icon and placeholder "Field Name".
- Sixth row: An input field with a lock icon and placeholder "Field Name", containing the text "Some text".
- Seventh row: A search input field with a magnifying glass icon and placeholder "Search Field".
- Eighth row: A search input field with a magnifying glass icon and placeholder "D". Below it is a list of items:
 - Dartmouth College
 - DC 37
 - DriveTime** (highlighted in light blue)
 - Dr. Reddy's
 - Placeholder
 - Placeholder
 - Placeholder

Modal Header

Your account has been temporarily locked after 5 failed login attempts. Please try again in...

SECONDARY

Table Column ↑ Table Column Table Column

Label
Featured Data Item

Label Data Item

Popout

From

To

POSITIVE NEGATIVE UNSELECTED

Mockups

Login Screens

My concept for a responsive login. Winston's tools are known for **custom client branding**. So this was made with that in mind. With this layout, users can add a color, imagery, and text per client.

Other than the splash page, I designed the on-boarding experience (sign up and password user flows). I worked closely with our dev team to make sure every header, field, and button was consistent with the style guide.

The Children's Place

Your password has been reset

Username

Password

LOGIN

Forgot Password? | Create New Account

Need Support? Call 1-800-234-5678 (M-F 8:30am to 5pm EST) or [email us](#)

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isword

WINSTON BENEFITS

Username

Password

LOGIN

Forgot Password? | Create New Account

Learn. Enroll. Manage.

Use this site as an online resource for all your benefit related needs. Here you can:

- Learn about available plans
- Enroll in new plan elections
- Manage your plans throughout the year

Release 1.3.6 | © 2018 Winston Financial. All Rights Reserved

isword

Create Username and Password

Passwords do not match

Username: JSmith1

Password:
Re-enter Password:

BACK NEXT

© 2019 Winston Benefits

Mockups

Benefits Tab

There was so much info tied to each employee's profile. Admin users rely on it to process benefits. The Benefits tab is the first place they will go to troubleshoot.

We decided to organize at-a-glance info in stacked cards. And have secondary tabs, links, and arrows hint at more.

The idea is to show **priority info first**, then let users drill down when needed to ease mental load

Social Security	Employee ID	Work Status	Employee Class
321-54-9876	987654321	Leave Of Absense	Active PT Benefits Eligible
Participant ID	9999999999	Gender	Female
DOB	07/12/1960	Marital Status	--
Age	56	Ethnicity	--
Full Address	1050 S. Longmore Dr. # 45 Mesa, AZ 85202	Disabled	<input checked="" type="checkbox"/>
		Medicare	--

Status
RISK FACTOR
WELLNESS

Benefits (6) [DETAILS >](#)
Total \$71.49 [BILL](#)

Type	Plan Name	Coverage	Effective Date	Per Pay
Health	Traditional Plan	Employee Only	01/01/2017	\$56.75
Dental	Classic High	Employee + Child	01/01/2017	\$13.33

DRIVETIME
 Mrs. Kelli M Brune
 XXX - XX - 9876
 ACTIVE EMPLOYEE

[VIEW](#)

Benefits | Dependents
Documents | Notes

THE CHILDREN'S PLACE
 Kelli R Smith
 XXX - XX - 1234
 SEVERANCE SPOUSE

[VIEW](#)

Benefits | Dependents
Documents | Notes

THE CHILDREN'S PLACE
 Mr. Kelli Smith Jr
 XXX - XX - 4567
 TERMINATED VIP EMPLOYEE

[VIEW](#)

Benefits | Dependents
Documents | Notes

FRESH THYME
 Kelli Doe Jr
 XXX - XX - 4567
 --

[VIEW](#)

Benefits | Dependents
Documents | Notes