Employee Self Service

Usability Study Results

January 2022, Ashley Bryant

Purpose of the study

Time off workflows

- Evaluate workflows for requesting and approving time off

- Gather feedback on details grids

Personal profile page

- Evaluate workflow for making changes

- Gather feedback on navigation and page layout

Life events wizard

- Evaluate workflow for changing marriage status and adding beneficiary

- Gather feedback on instructions and step flow

Overall navigation and visual design

- Gather feedback

Methodology

Participants

- Four business partners who were involved in the design process

- One HR and ESS customer who was involved in the design process

- Participant with least experience: 5-plus years in role

Testing format

- One-on-one remote testing through Microsoft Teams

- Participants were asked to complete four tasks in QA environment and provide feedback

Time off workflows

Task 1: Submit time off requests

Participants were asked to:

1. Submit a vacation request for a single day

2. Submit a vacation request for multiple days

Task 1: Submit time off requests

Results

● All participants completed the tasks successfully.

● Requesting multiple days did not hinder the participants.

● Two participants initially tried to select the date from the calendar on the dashboard, but they quickly found their way.

● On participant double-clicked when closing the Request Time Off panel and accidentally opened the help panel.

"I like the look of it much better than the older… perpetual version. Much easier."

"I like this a lot better. I like how if you click Request Time Off, this page opens here on the side, and it doesn't take you to a whole other page."

"Pretty standard. It was easy to follow."

Task 1: Submit time off requests

Results

- All participants understood that the required fields were designated by asterisks.

- Purpose of Start Time and End Time fields:

  - Four participants expected the fields would be used when employees take a partial day off.

  - One participant expected the fields would be used for employees with a shift differential or for planning when employees have overlapping shifts.

"Easy, cleaner than it used to be. I like this. I like seeing that the dates are here (highlighted on the calendar)."

"The calendar came up quickly. I like being able to type or use the calendar (to enter a date)."

Task 1: Submit time off requests

Recommendations

● Add the date selection feature to the calendar on the dashboard.

● If employees have standard shift lengths, automatically calculate the Total Hours field.

● Relocate the Close button on the Request Time Off panel so that an extra click doesn't inadvertently open the help panel.
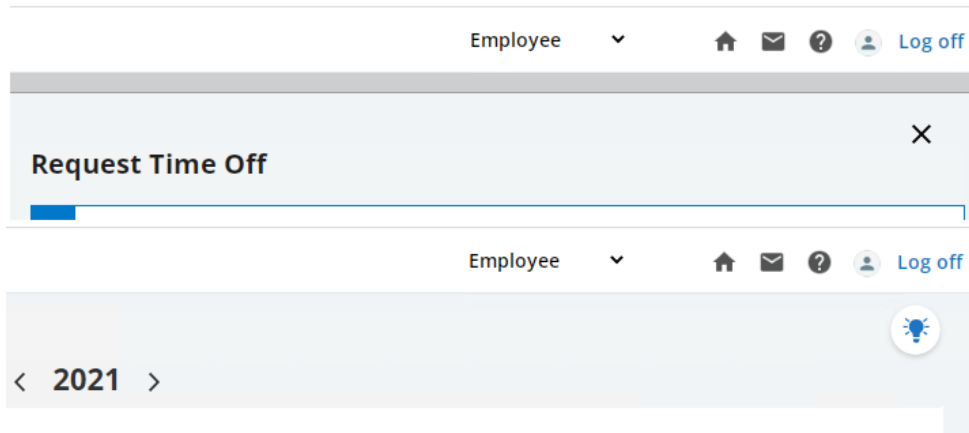
"The only thing is, when you request multiple days, or even a single, having to type in the number of hours is a bit redundant."

Task 2: Approve time off request

Participants were asked to go to the Message Center to approve a time off request from a direct report.

Task 2: Approve time off request

Results

- All participants completed the task successfully.

- One person didn't understand the purpose of the Override checkbox. (It wasn't applicable for this task.)

- One person took longer than the others to figure out how to display the entire message, but she prefers the accordion to the pop-up messages in prior version.

- Two participants expressed opposing views on whether accordion should be open or closed by default.

"It was very easy. It was right there. You can click on it. Boom, boom, done."

"What I'm not clear about is what this option is for – the Override (check box). Is that supposed to be checked or not supposed to be checked?"

"Easy enough"

Task 2: Approve time off request

Recommendations

- Provide option to show or hide all accordion sections and remember the users' selection.

- Add tool tip to explain the purpose of the Override checkbox.

Question

- Why is there no notification that you've received a new message?

- Changing the appearance of the message icon when a new message arrives is a common pattern and might be helpful.

"The only thing that I would prefer is that you didn't have to click on the arrow to be able to see everything. It doesn't take that much space.... If the page was full, then the arrows could be closed."
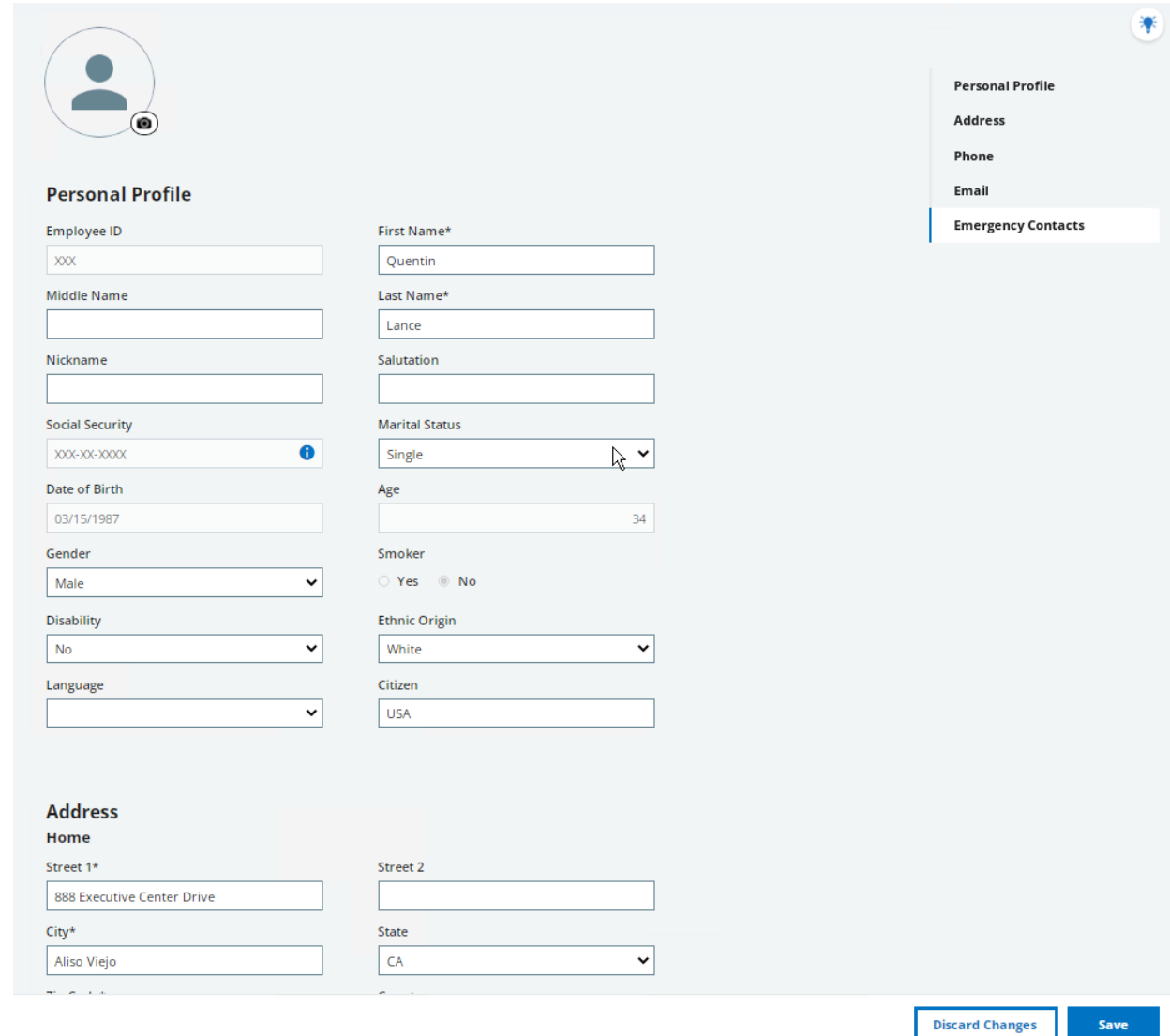
"Probably in real world scenarios best to leave them closed by default because it could get really long if you leave them open by default."

Personal profile

Task 3: Edit personal profile

Participants were asked to go to their profile page to update their street address and add an emergency contact.

Task 3: Edit profile

Results

● All participants completed the task successfully for the most part.

● One participant entered the emergency contact's last name in the Relationship field.

Task 3: Edit profile

Feedback

● All participants preferred the single page design.

● Three participants specifically stated they like the option to either scroll or use the secondary navigation.

● Two participants mentioned the Save button – it's always available and you only have to click it once for multiple changes.

● One person didn't like the secondary navigation being on the right. She would prefer to have all navigation on the left.

"Oh I see – it's one big page and it just scrolls down. I like that because in the old version you had so many different pages and this is more scrolling like a Word document can do."

"I do really like this how you can either scroll or click on it to go directly to there. That's really nice."

Task 3: Edit profile

Recommendations

In emergency contact section:

● Consider moving phone number fields underneath the contact's name.

● Consider standardizing the fields:

  ○ Replace Address 3 with City, State, and ZIP Code.

  ○ Use separate fields for first and last name.

"I think the cell should be before the home (phone number). I can't imagine anyone using an address… I would think if this should be their city, state and ZIP, that should be spelled out. However 99% of clients never use an address for an emergency contact. It's always a cell phone or work or sometimes a home."

Life events wizard

Life Events

> Life events are personal events that qualify you to change your benefits enrollment. Depending on the event, you will be able to change your personal information. In addition, you may also add, change or delete a benefit enrollment.
>
> If you have experienced any of the life events defined below, select the event that best describes your situation and you may change your benefit enrollments.
>
> You have a specified number of days from the event to complete benefit enrollment change requests. Your dependent and current benefit enrollment changes are recorded as soon as the life event is approved.
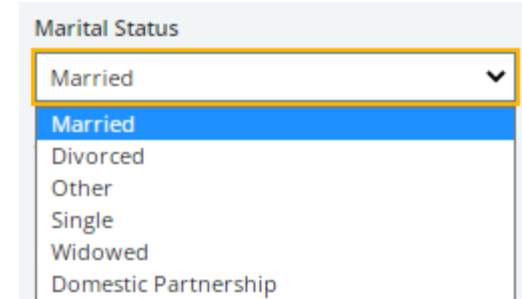
Event	Event Date	Event Status	Remaining Days		
Adoption of a child				✏	🗑
Birth of a child				✏	🗑
Marriage	12/08/2021	Incomplete	46	✏	🗑
Spouse lost benefits				✏	🗑

Task 4: Record Life event

Participants were asked to:

- Update their marriage status

- Add a beneficiary

Task 4: Record Life event—update marriage status and add beneficiary

Results

- Three participants completed the task successfully.

- Two participants completed part of the task:

  - In Life Events wizard, one attempted to select Married in Marriage Status field, but change wasn't retained. She didn't notice and proceeded with Single selected.

  - One went to Benefits > Dependents and Beneficiaries page and clicked New to add a dependent.

  - In Life Events wizard, he reviewed check boxes on Instructions screen, but did not select the Personal option to update his marriage status.

Task 4: Record Life event—feedback on step flow

"That would be nice if you could click on these (the check marks in the step flow) to go back to wherever you wanted to go back to."

"I think it's good because it's showing you where you are in the process."

"They were very informative as far as being able to put in what you need."

"I like it. It gives the customer an idea of what they're looking at."

"This page doesn't say what it's for. Oh yes it does. For some reason – maybe this needs to be a different color [referring to step number and description] because I didn't read that. As much as I've done this myself in demos and training, I did not read that."

Task 4: Record Life event—feedback on instructions screen

"It makes sense. Because you've got to do personal information, you might have moved, and dependents and beneficiaries."

"I like them, but I wonder if the employees are going to know. Because I know what's under the Personal (checkbox), the address, and beneficiaries.

"Let's say that I got married but I don't update my marital status to married. Is an admin going to get flagged on that to update it?"

"I think it's fine other than the fact that the font is pretty small but maybe that's because we're inside a window inside a window."

Task 4: Record Life event—feedback instructions screen

"That was nice because especially being a marriage it gave you all options right there, and like I didn't change my address so I didn't have to go through that screen… I think it was pretty self explanatory. I would question how easy it is when you have multiple benefit plans set up to add dependents to all or some benefits. "

"They (check boxes) work if you know what they are and what they do. Some people will come here and not know what this is for."

Task 4: Record Life event—feedback on Dependents and Beneficiaries page

- The SSN/SIN selection field needs a label.

- Would be nice to have a "Use employee address" checkbox so that you don't need to reenter it.

Task 4: Record Life event—other feedback

● One participant felt the Summary screen was incomplete because it had benefits and dependent information but no reference to the changes to personal information. Expects to see summary of all changes.

● Two participants commented that error messages at the top of the Exit screen are clear and stand out.

● One participant said the text at the bottom of the Exit screen needs to be larger or darker.

"This font is gray. I'm in my 50's. I have old eyes. It's just a little harder to read and focus on because it's kind of gray and all the gray just meshes together."

Task 4: Life events

Recommendations

- On instructions page, update on-screen content for the Personal checkbox to reference the marriage status field.

- If user selects the marriage event in the wizard, but doesn't change marital status, display message to confirm whether they intended to change it.

- Look for other opportunities to add logic to catch potential errors.

- For field in which the user selects either SSN or SIN, add label. Perhaps "ID type"?

- For Summary page, include summary of all activity completed in the wizard.

- Check contrast ratio for text. For gray backgrounds, consider making regular sized text darker or larger.

General feedback

Feedback on wizard

"I like it. It's very streamlined. Very modern looking."

"It flows well."

"I like the progress bar at the top.

The Next and Previous buttons are much better than the arrows before. It actually tells us what each button does instead of a greater than or less than symbol at the top of the page, so I think that's a big improvement."

Feedback on ESS

"It's much cleaner. More modern. Much more now."

"This is easier to move around in. (In the older version) I end up clicking around all over the place before I can find what I need."

"I like it. I used the old version. I like (the new version) better.

"I think it's very similar for companies that have already used it that it's not going to be a huge thing. But I do think it's easier to navigate than the old system."

"It's definitely a lot easier… Everything looks good. A big improvement over the last version."

Mobile app features

Mobile wish list

Top three features for a mobile app

- Ability to enter time off requests (4 requests)

- Viewing pay stubs (4 requests)

- Open enrollment and life events (3 requests)

- Changing personal information (2 requests)

- View current benefits (1 requests)

- Clocking in and out (1 request)

Specifically for managers

- Notifications

- Time off calendar

Q&A