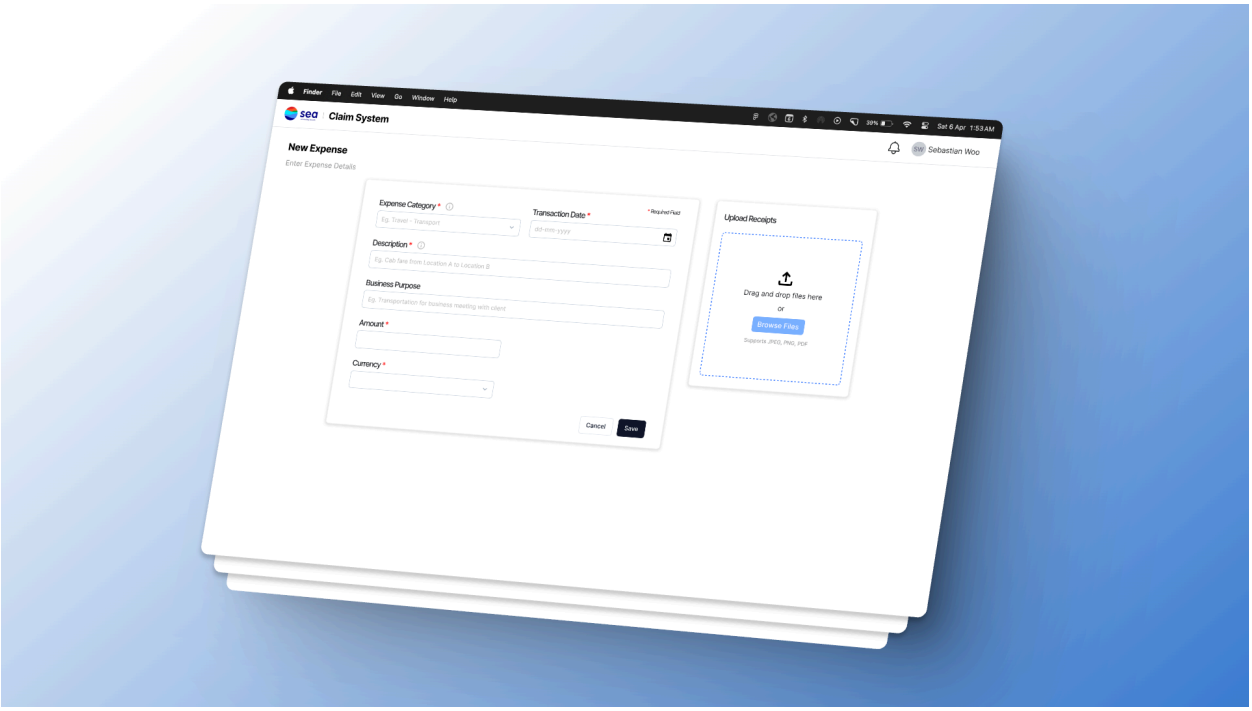
Sea UX Design Assignment

By Kenneth Chan



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Task

Design the claim form and approval process based on the webpage, ensuring that the claim submission and approval process is intuitive, efficient, and user-friendly.

The solution needs to meet but is not limited to the following requirements:

- Conducting user research to understand the needs, preferences, and pain points of employees, managers, and finance personnel.
- Creating user personas to represent each stakeholder group and identify their specific requirements.
- Designing an intuitive and user-friendly claim form that simplifies the submission process for employees, including clear fields, helpful tooltips, and easy navigation.
- Developing a streamlined approval process for managers, ensuring they can efficiently review and act upon submitted claims, with clear status indicators and notification systems.
- Optimising the interface for finance personnel to easily access and process approved claims, with robust tracking and reporting functionalities.

Design Process

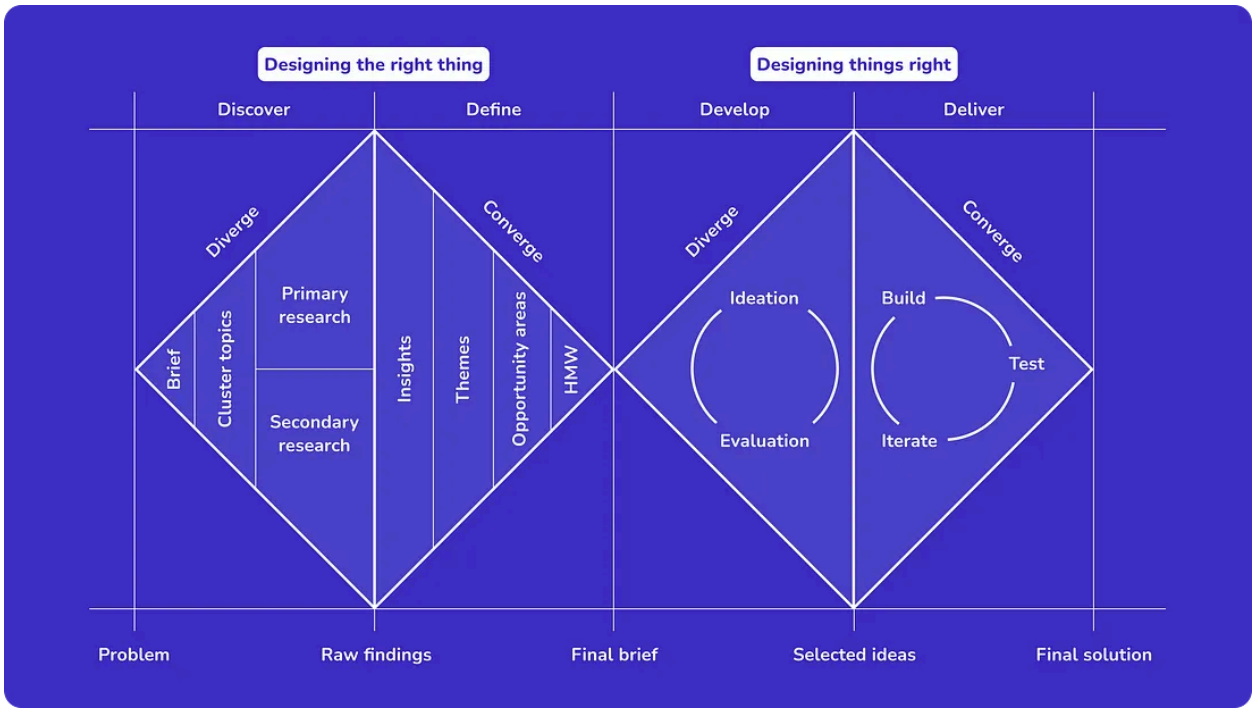


Figure 1: Double Diamond Design Process

For this assignment, I will be using the Double Diamond Design Process.

Problem Discovery

User Research Survey

I crafted a short user research survey using Google Forms, aimed to gather insights from participants such as their needs and pain points regarding claim processes and to assess user behaviour and preferences.

However, since I do not have access to the staff members of the large-scale company mentioned in the brief, the responses will be based on participants' prior experiences with claim processes within their own companies.

By analysing the survey findings, I was equipped with valuable insights to guide the design process and ensure that the design meets user needs and preferences effectively.

Survey Findings

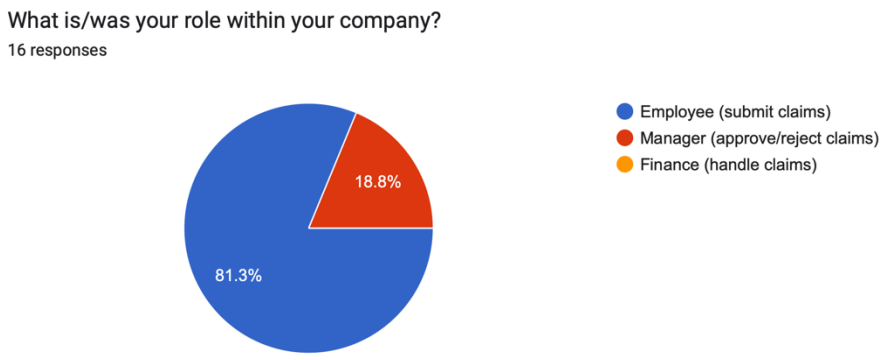


Figure 2: Survey Results

The survey included 16 participants, primarily employees. Some of the responses are as follows:

What are the main usability issues you have faced with the claim forms/approval process?

- *"Transparency on the status of the claims were often times an issue"*
- *"Interface isn't clear on where to add and submit claims etc"*
- *"I have to go through different tabs before I get to the approval page so that is a bit of a hassle especially when there are many claims from my team"*
- *"Too lengthy"*
- *"dropdown selectors have too many options, hard to find the correct option"*
- *"Claims still get sent to me even when am on leave, I am unable to respond timely"*

What design features or functions can be added to the claim process to make it more efficient and user-friendly?

- *"Less manual entry and drop down function"*
- *"Video guides on how to navigate the platform could be helpful, especially for less tech savvy people. Having examples for claims that would fall under each category would be helpful as well so that less mistakes would be made, reducing any back and forth."*
- *"Examples of documents required. Drag & drop feature for uploading of files. Auto extraction and population of fields from uploaded files."*

- *“It would be great if everything can be displayed clearly on a page/fewer pages with the need for fewer clicks to get to the approval page.”*
- *“filter dropdown selections as you type “*
- *“An easy way to set my vacation period so that no claims will be directed to me while i'm away”*

As most of the survey participants' inputs are from the perspective of an employee, it gives us valuable information to help with the design of the claim form.

Online Research

As there is a lack of feedback from the manager/ finance perspective in the survey conducted, I did secondary research on some common problems faced:

1. **Missing or incomplete information:** Employees forgetting receipts, not filling out forms properly, or missing crucial details can stall the approval process.
2. **Inefficient processes:** Manual data entry, paper receipts, and chasing down missing information all slow down the process and create extra work.

Problem Definition

Current Situation

As provided in the assignment brief:

Currently, the company's claim process may suffer from **inefficiencies, lack of clarity, and user frustrations.**

Employees might find it **challenging to navigate** through the claim submission process

Managers may face **difficulties in tracking and managing** pending claims

Finance personnel may encounter **issues in processing claims** efficiently

These pain points can lead to delays, errors, and overall dissatisfaction with the claim system.

User Personas

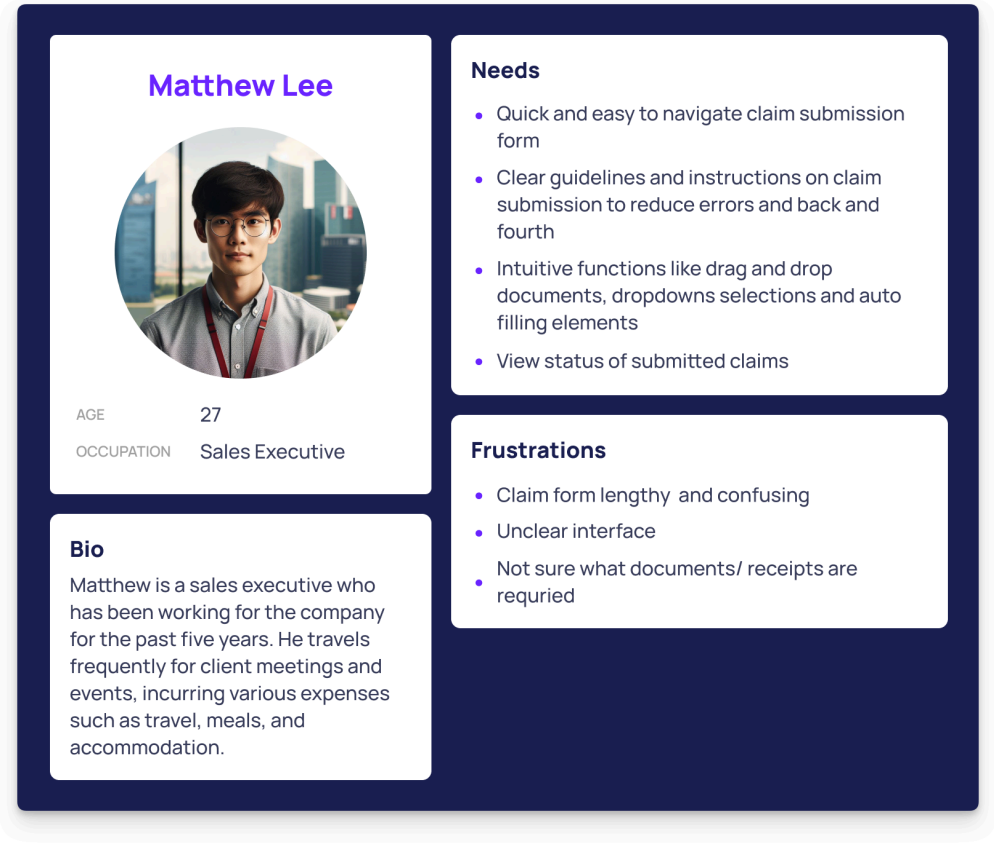


Figure 3: User Persona - Employee

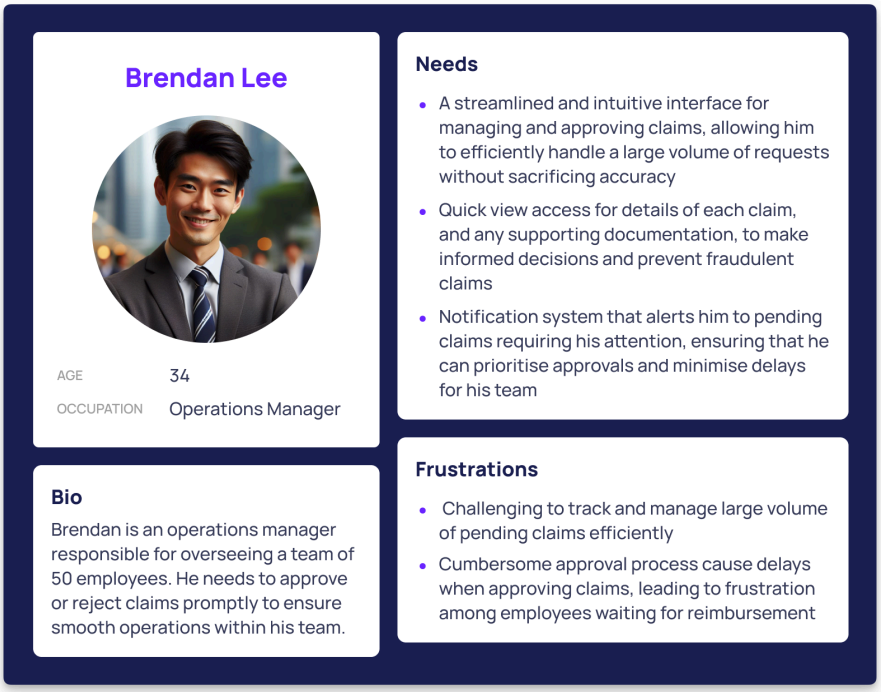


Figure 4: User Persona - Manager

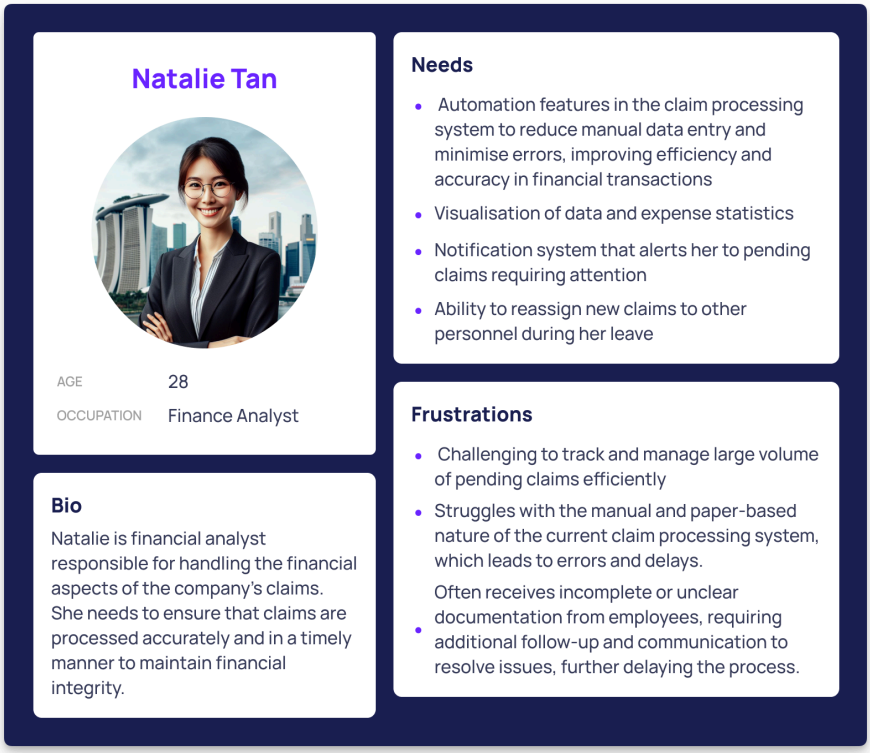


Figure 5: User Persona - Finance

Problem Statements

1. **Tedious claim form:** Employees encounter frustration with claim forms due to unclear and unintuitive design, hindering their ability to complete submissions correctly and efficiently.
2. **Inefficient Claim Tracking:** Managers and Finance personnel face difficulties in effectively tracking and managing pending claims because of the system's lack of intuitive functions and features, leading to delays and oversight.

Solution Development

Ideation

To address the identified issues, I identified these potential solutions:

1. **Claims Form Design**
    - Keep form concise and simple

- Add useful and intuitive functions like:
    - Drag and drop document upload
    - Dropdown selections
    - Context aware prefilled fields
    - Helpful tooltips and placeholder text
    - Save drafts
    - Priority levels to expedite special cases

2. **Approval Process**
    - Notifications for new pending claims
    - Overview summary of number of pending claims to view
    - Sort priority based on how long it has been outstanding / priority level set
    - Quick view function to view claims right from dashboard
    - Ability to approve/ reject from the dashboard
    - Ability for managers to set leave period and reassign all claims to another person during that period

User Journey Map

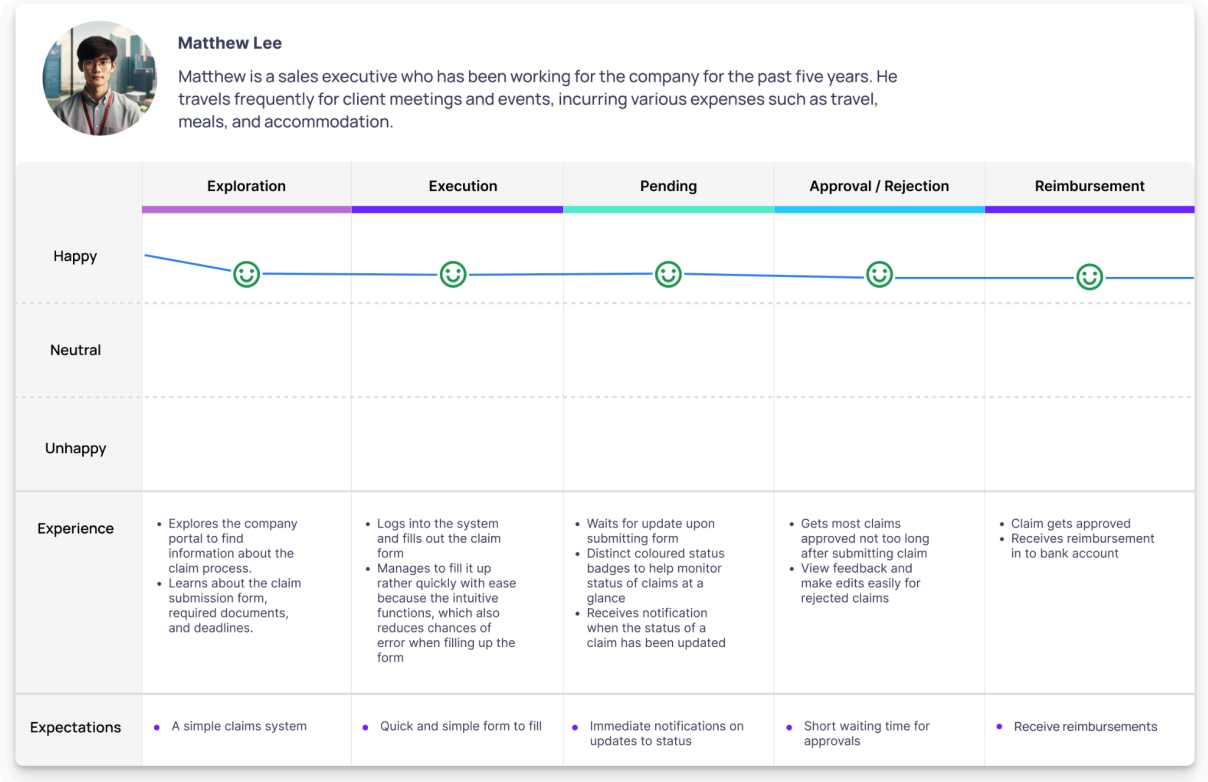


Figure 6: User Journey Map - Employee



Brendan Lee

Brendan is an operations manager responsible for overseeing a team of 50 employees. He needs to approve or reject claims promptly to ensure smooth operations within his team.

	Exploration	Review	Response	Handover
Happy				
Neutral				
Unhappy				
Experience	• Logs in to claim system, view outstanding claims • Dashboard shows summary of pending claims, classified based on how long it has been outstanding	• Quick dropdown expanded view option to approve/ reject simple claims easily from dashboard • Reviews each claim to ensure forms are filled correctly	• Approves most of the forms thanks to well designed form, reducing errors • Leaves down comments and feedback for rejected claims	• Monitors the status of claims to ensure timely processing and reimbursement for employees
Expectations	• Quick view of pending claims	• Ability to handle large volume of claims efficiently	• Quickly leave comments for rejected claims	• Useful information at a glance

Figure 7: User Journey Map - Manager



Natalie Tan

Natalie is financial analyst responsible for handling the financial aspects of the company's claims. She needs to ensure that claims are processed accurately and in a timely manner to maintain financial integrity.

	Exploration	Review	Response	Process
Happy				
Neutral				
Unhappy				
Experience	• Receives notification of newly submitted claims and begins the process of verifying and validating the submitted expenses for processing.	• Quick dropdown expanded view option to approve/ reject simple claims easily from dashboard • Reviews each claim to ensure forms are filled correctly	• Continues the processing workflow based on the approval status of each claim, initiating reimbursement for approved claims or leaving feedback for rejections.	• Completes the processing of approved claims, updating financial records and ensuring compliance with company policies and regulations.
Expectations	• Quick view of pending claims	• Ability to handle large volume of claims efficiently	• Quickly leave comments for rejected claims	• Visualised data

Figure 8: User Journey Map - Finance

Low Fidelity Sketches

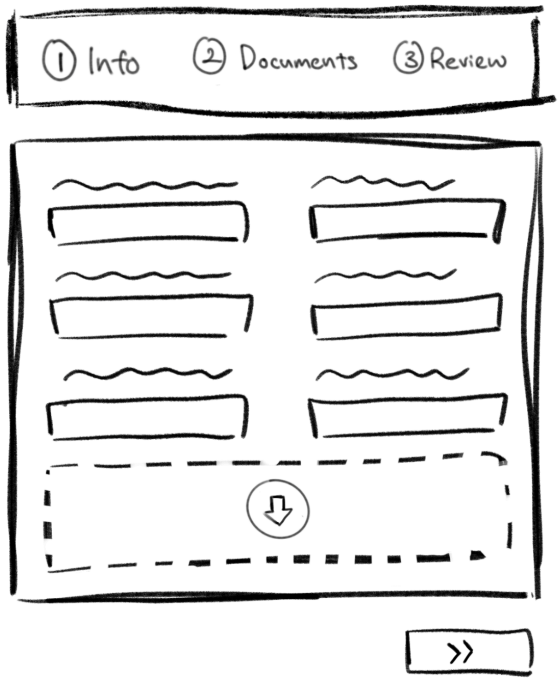


Figure 9: Claim Form Draft Sketch 1

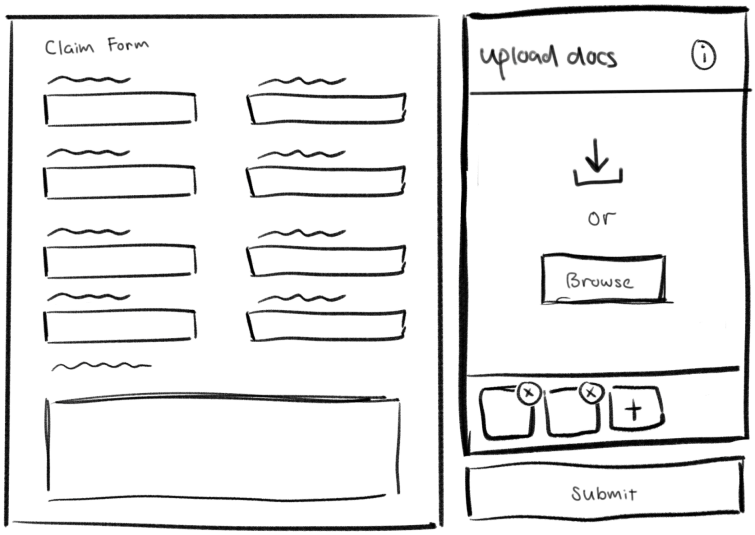


Figure 10: Claim Form Draft Sketch 2

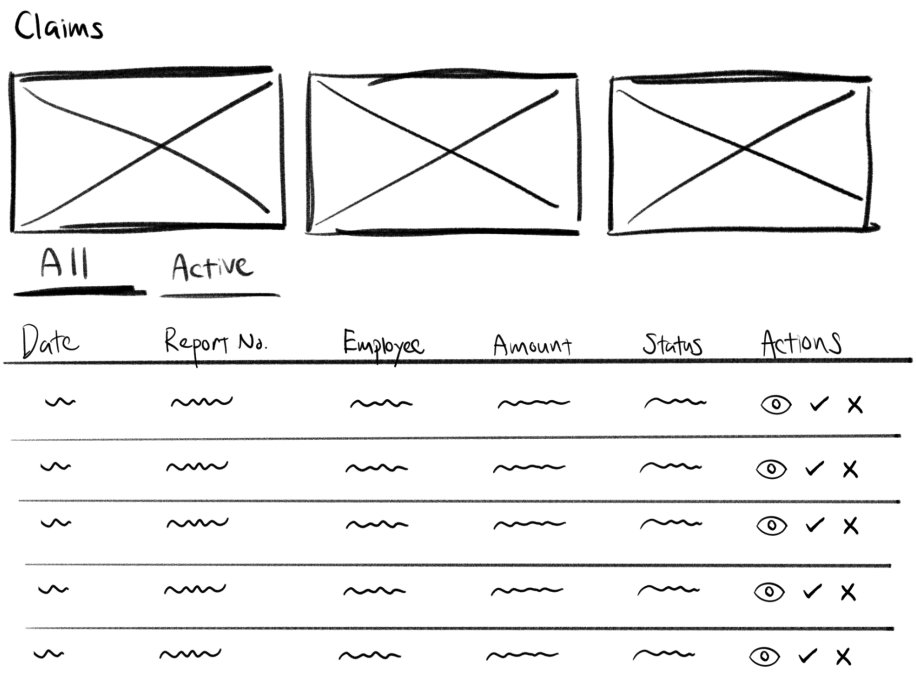


Figure 11: Claim Dashboard Draft Sketch - Manager



Figure 12: Claim Dashboard Draft Sketch - Finance

Solution Delivery

High Fidelity Designs

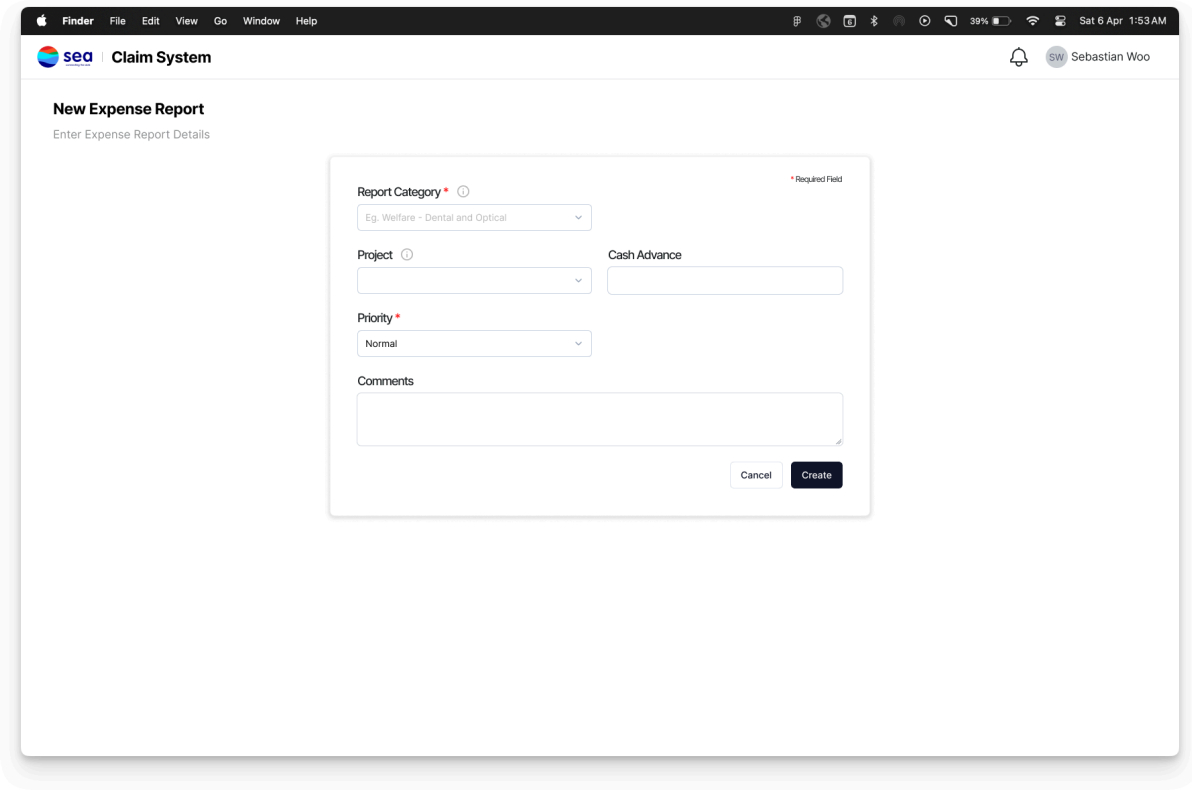


Figure 13: New Expense Report Form Design

The newly designed Expense Report Form (Figure 13) aims to be simple to use and understood quickly. As such, several features have been incorporated into the form with the emphasis on enhancing its user-friendliness and intuitive nature.

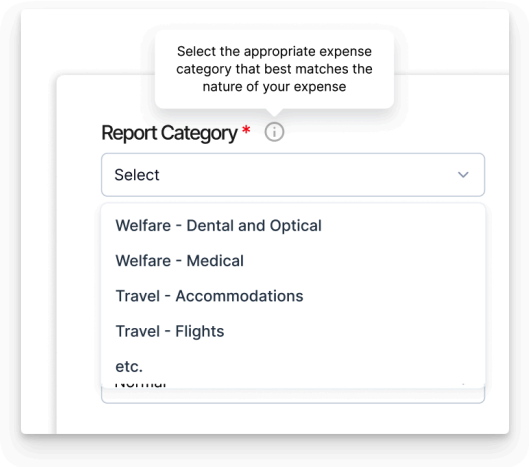


Figure 14: Feature Highlight - Dropdown selector and tooltips

As illustrated in Figure 14, when hovering over the information icon for each field, a tooltip will appear, providing helpful information to guide employees in filling up the form accurately and effectively. Furthermore, the use of dropdown selectors serves to minimise manual data entry and mitigate the risk of errors. The dropdown is also able to filter and set the desired option based on users' input, to help filter through fields with many options.

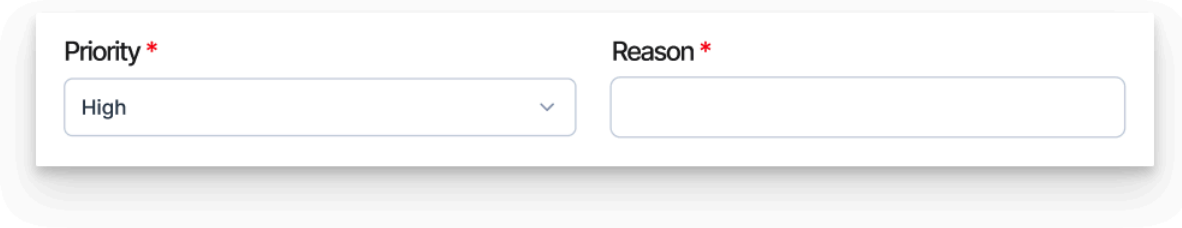


Figure 15: Feature Highlight - Priority Field

A priority field was also added in the expense report form to enable employees to expedite claims for special circumstances, ensuring that urgent matters are appropriately addressed. By default, this field is set to 'Normal' priority. Should employees opt to set it as 'High priority', they will then be prompted to provide justification by filling in the accompanying 'Reason' field.

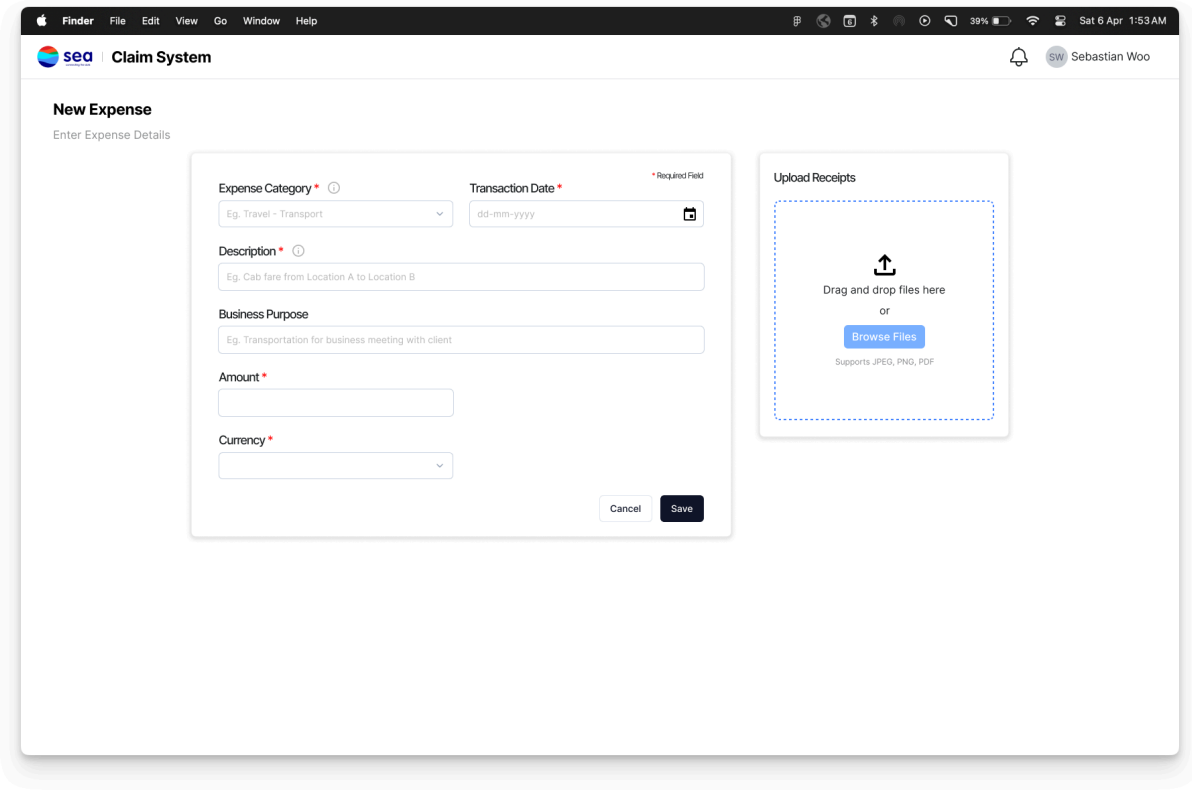


Figure 16: New Expense Form Design

Besides the dropdown selectors and information tooltips which are also present in the New Expense form, the New Expense Report form features placeholder texts to aid users in completing the form accurately. Moreover, employees have the convenience of dragging and dropping files directly from their devices into the designated area on the right for uploading receipts and other relevant documents. This intuitive approach streamlines the process of submitting expenses and ensures that all necessary information is provided efficiently.

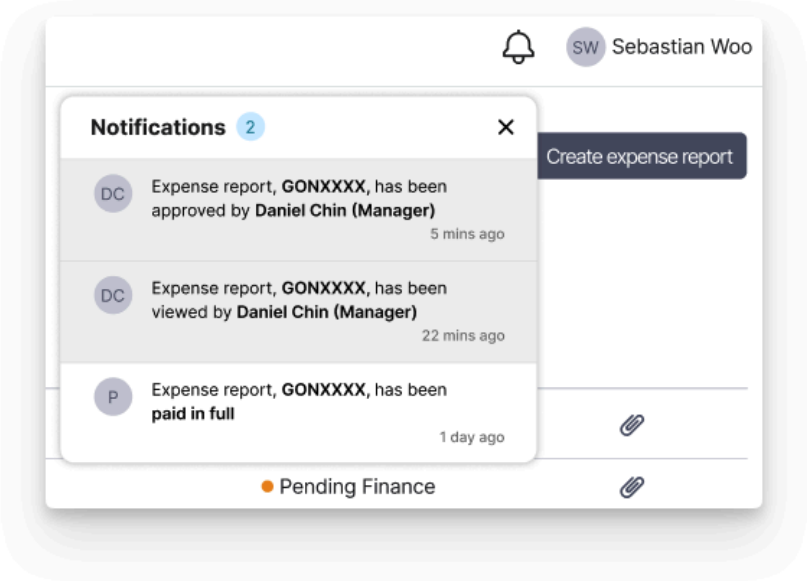


Figure 17: Notifications for Employees

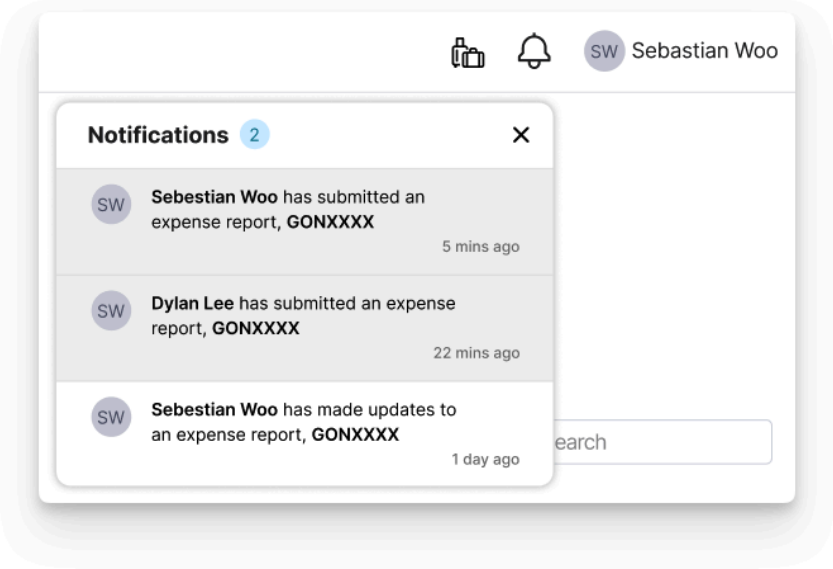


Figure 18: Notification for Managers/ Finance

A Notification system has been implemented to keep users informed of any updates related to their submitted claims. This feature ensures that users remain up-to-date with any new activities, facilitating the tracking of their active claims and providing prompt updates on it's status. This approach enhances user engagement and transparency within the claim submission process, ultimately leading to a more efficient and streamlined experience.

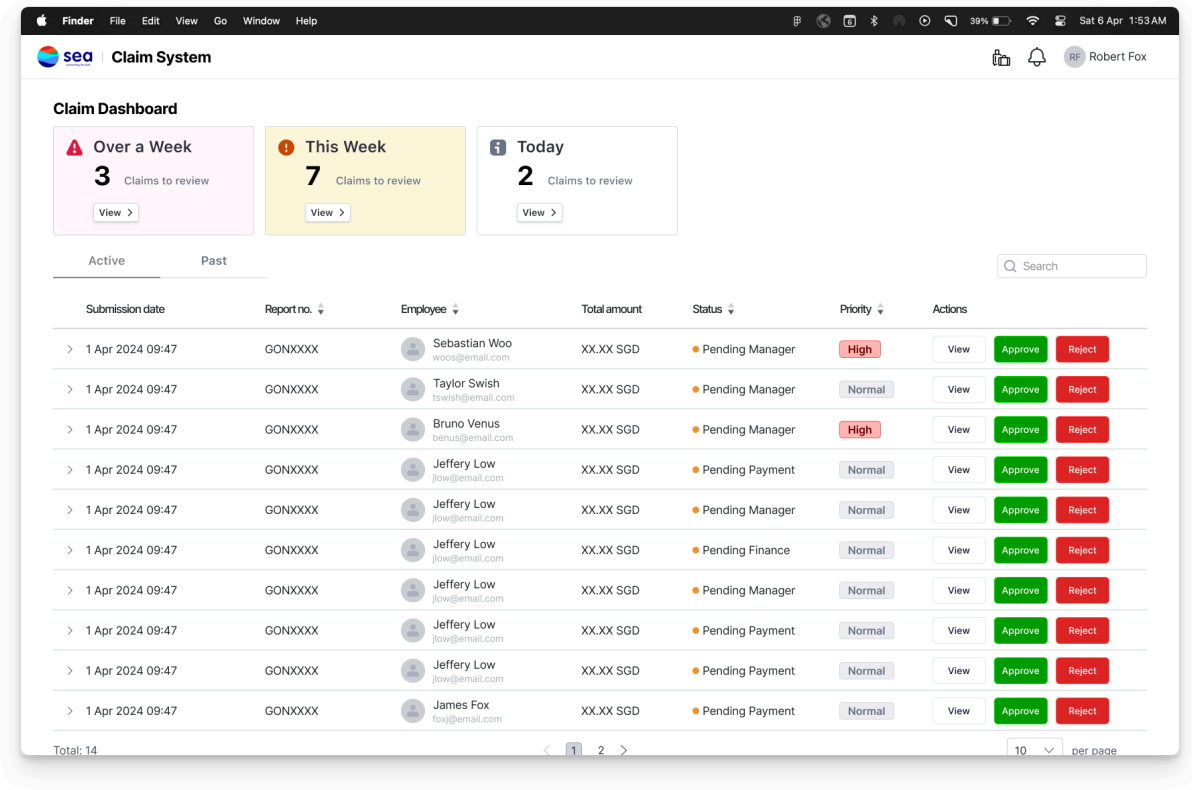


Figure 19: Manager Dashboard

The manager dashboard was designed to enhance the approval process. At the top area, there are cards showing information regarding the number of pending claims yet to be reviewed. By clicking on the 'view' button, it directs them to a page with a filtered table view, showing only the relevant entries. This provides the manager with a quick overview at a glance, allowing them to promptly take necessary action to and aim to minimise the number of pending claims. Special emphasis is placed on claims pending for over a week, pushing managers to prioritise and expedite review. By fostering a sense of urgency and accountability, this approach aims to optimize efficiency and minimize approval timelines, enhancing overall process effectiveness.

In the table of expense reports submitted, managers can choose to filter the table to show either active entries or all entries. The table consists of general information of each expense report, including the priority status so managers can quickly bring their attention to high priority claims. The table can also be sorted based on the columns like Report No., Employee or Status.

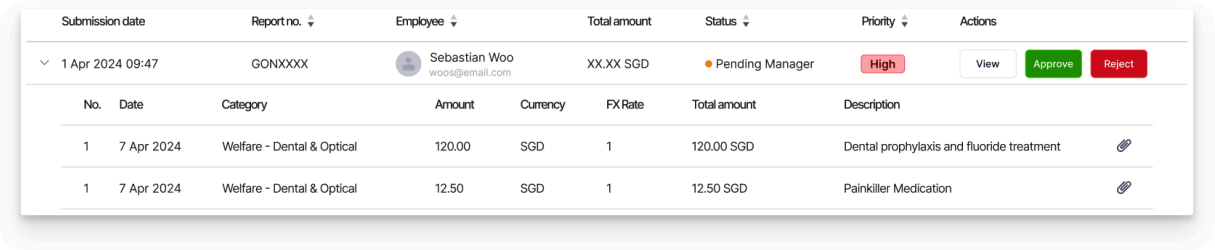


Figure 20: Quick View from Dashboard

To make the approval experience more convenient and efficient, managers can click on the dropdown within each expense report entry in the table. The dropdown will then expand to show the corresponding expenses within that report. This allows manager to act on simpler or more straightforward expense reports right from the dashboard, reducing the number of clicks needed for approving.

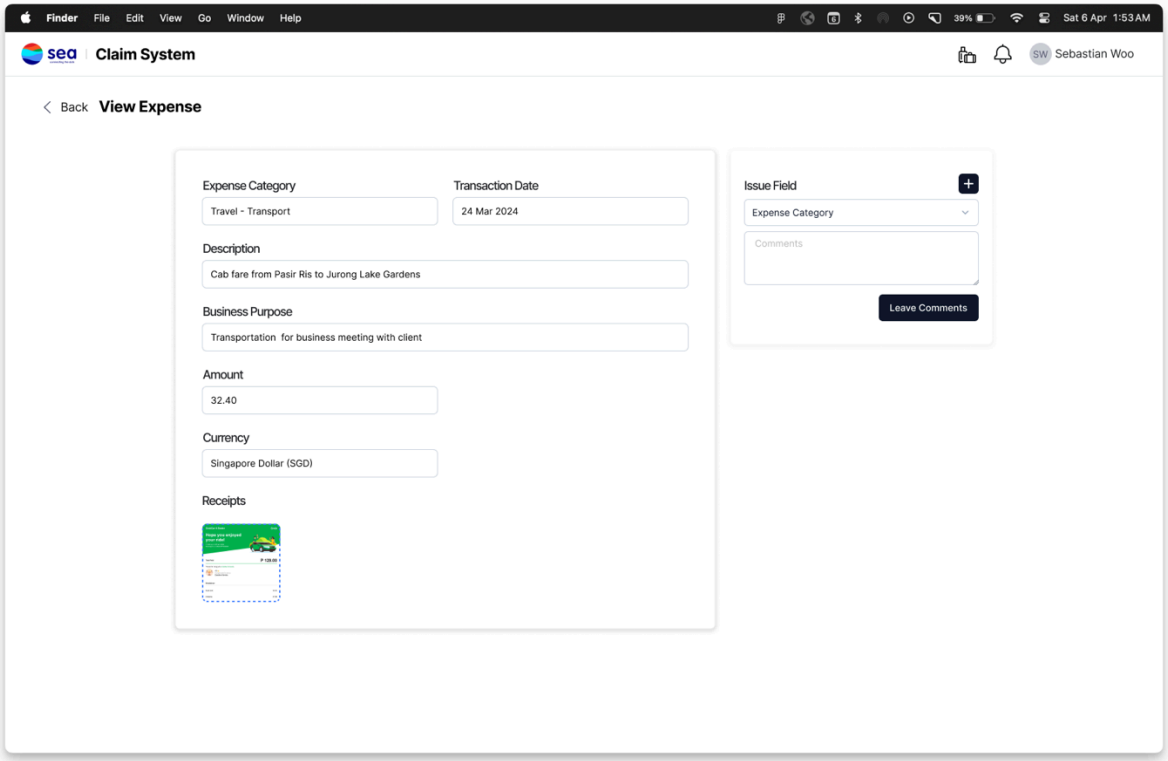


Figure 21: Reviewing an Expense

When reviewing expense reports, managers can view a read-only copy (Figure 21) of the employee's expense forms. This detailed view provides all the information needed to make informed decisions about its approval. If there are any issues with the submission, managers

can easily leave comments directly on the right side of the screen. A dropdown menu allows them to pinpoint the specific field containing the error and provide clear feedback to guide the employee towards a successful resolution.

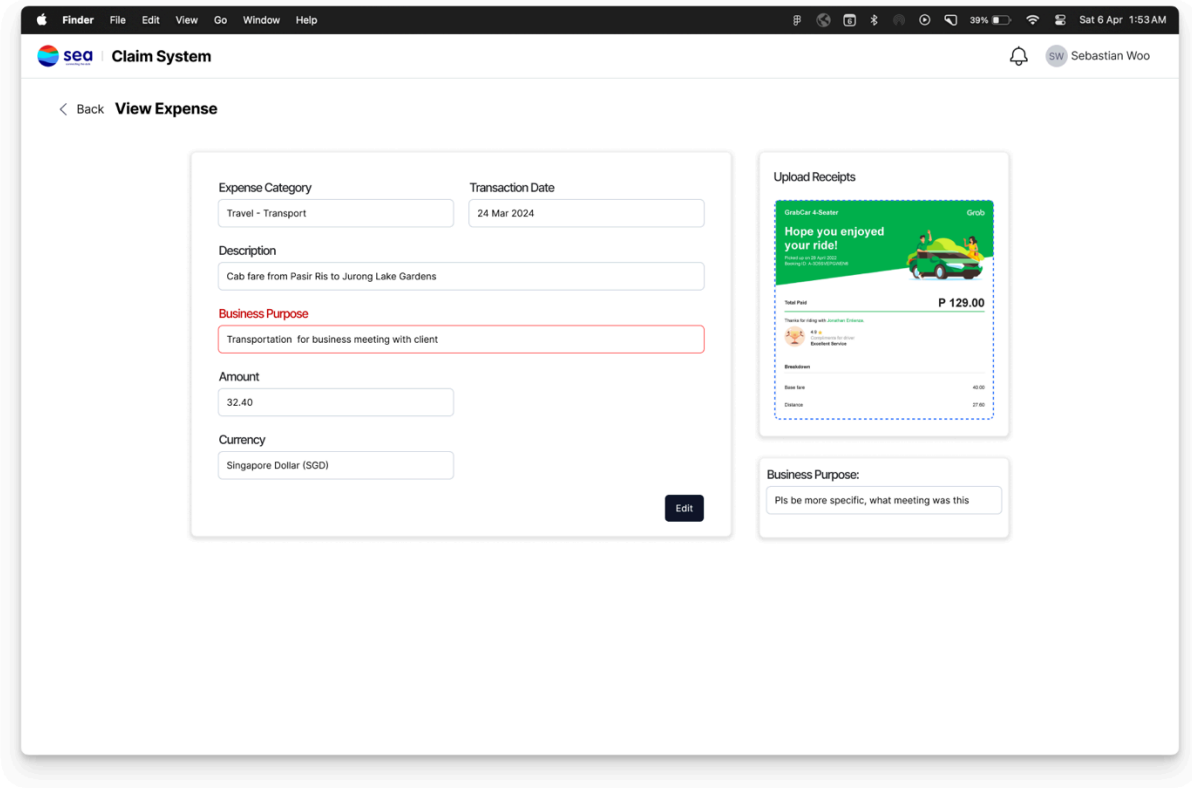


Figure 22: Employee Reviewing Feedback

When a manager rejects an expense report, employees will receive a notification highlighting the specific issue(s) in red. Their comments will also be displayed on the right side of the screen. Employees can then easily make the necessary edits and resubmit the claim for approval.

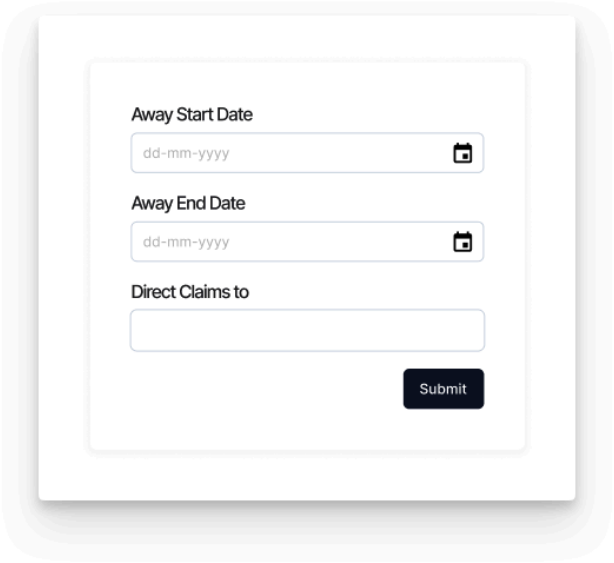


Figure 23: Setting Away Mode

Another feature implemented for managers and finance is the ability to set away mode for their period of absence from work. This allows users to redirect new claims to other personnel so that it will be processed more efficiently and reduce delays in approvals. This feature can be accessed from the navbar.

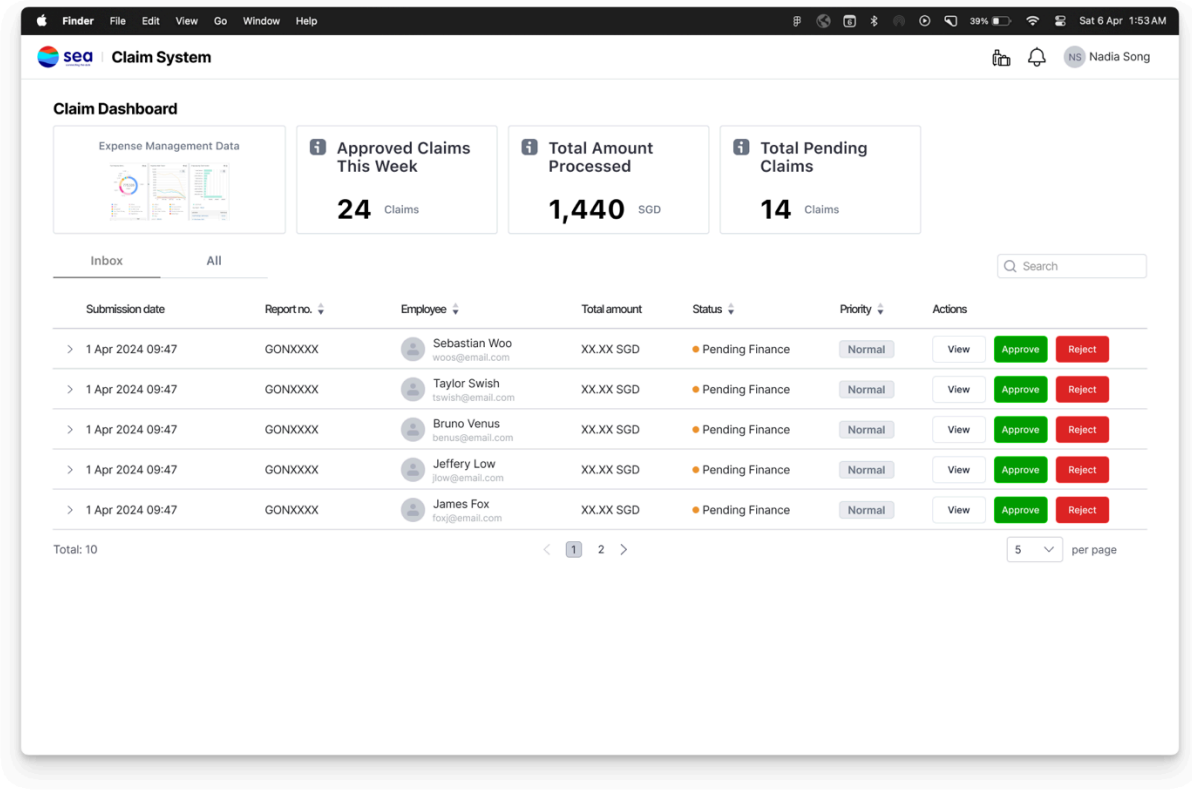


Figure 24: Finance Dashboard

The Finance Dashboard offers a high-level view of the company's expense management situation, similar to the Manager's view but with a focus on key financial metrics. Key data points like weekly approved claims and total reimbursements are prominently displayed at the top, allowing finance personnel to quickly monitor and track important financial information.

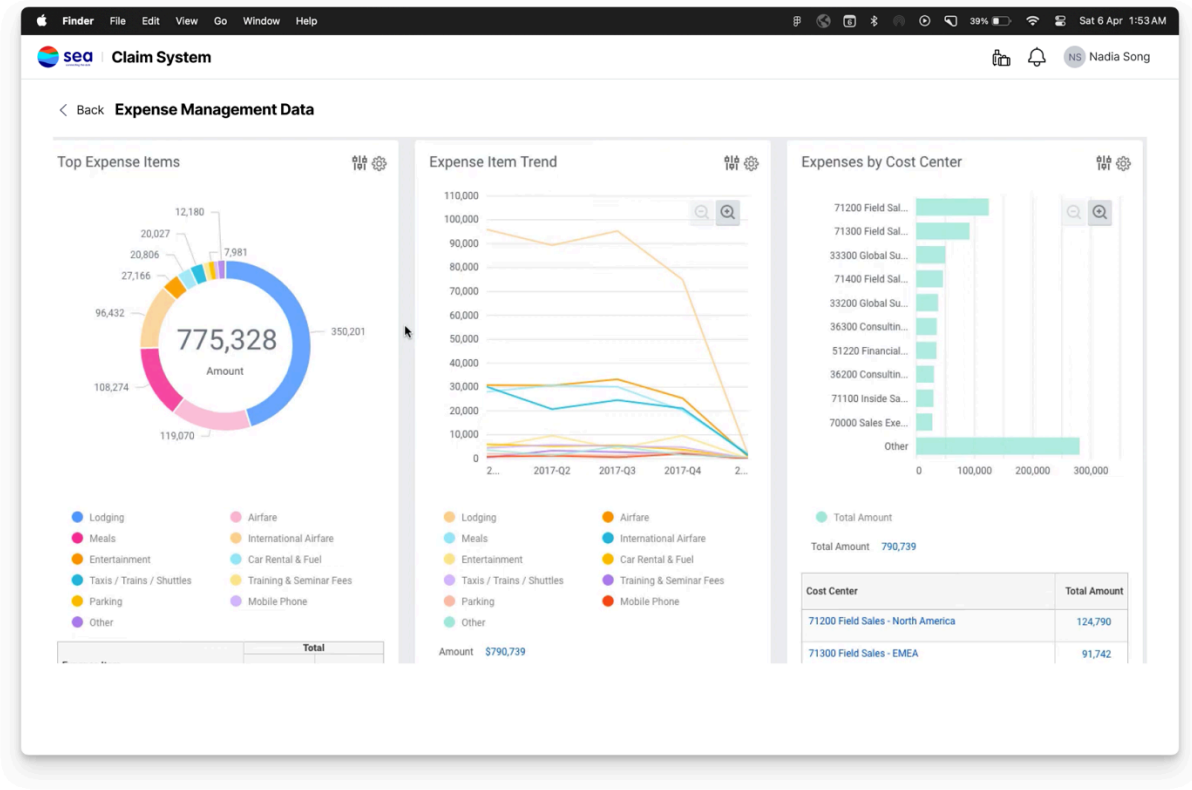


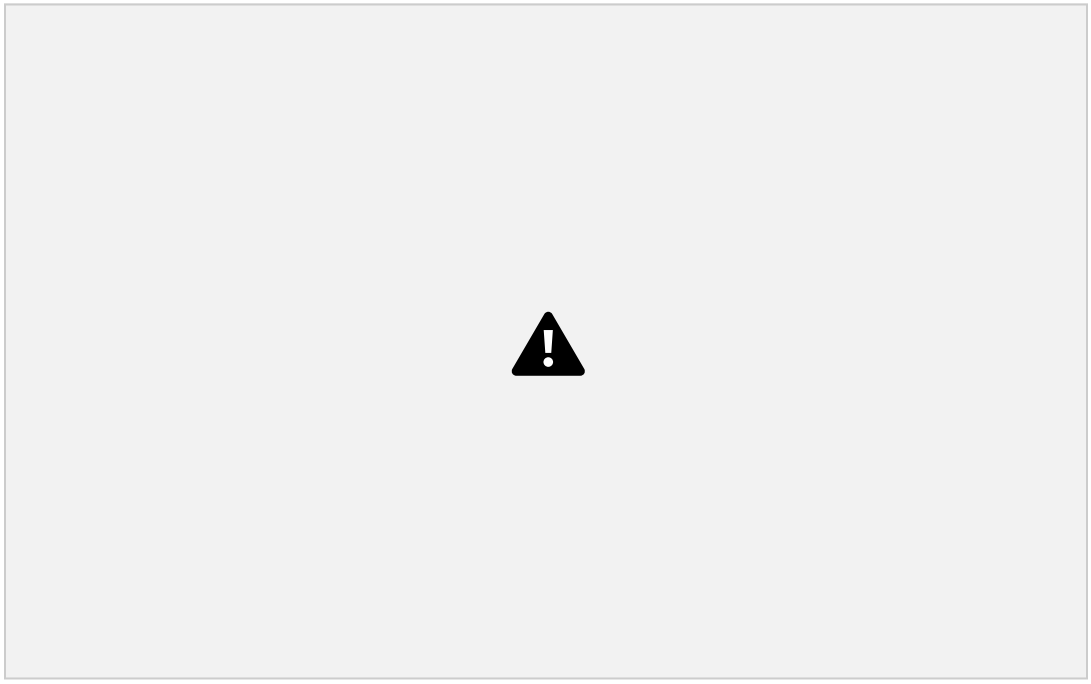
Figure 25: Expense Management Data Visualisation

Robust data visualisation tools have also been included to help get a comprehensive overview of the companies claims.

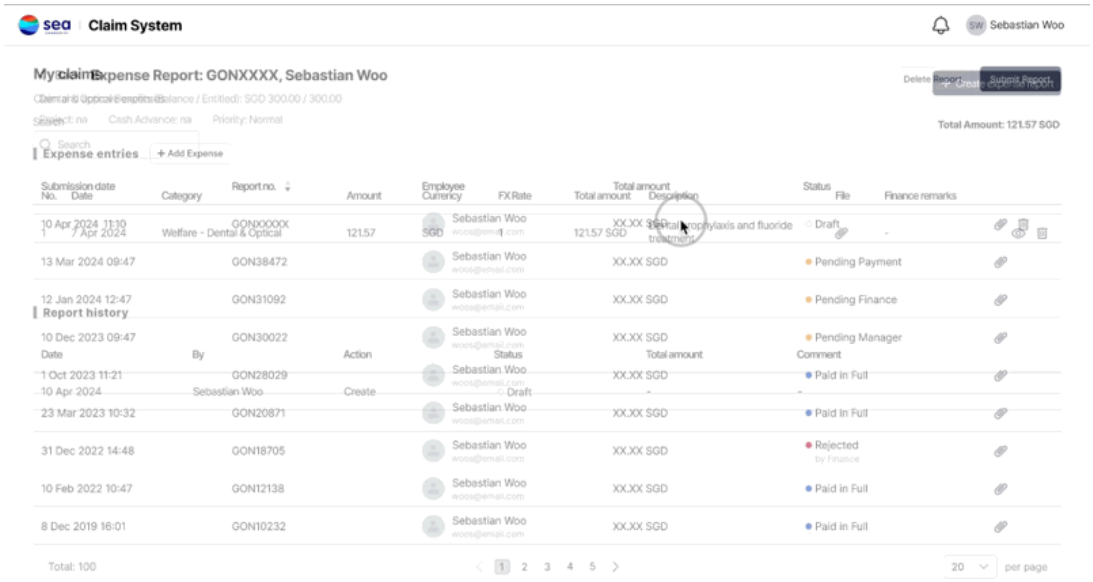
User Flows

Please refer to a demonstration of the user flows for common actions via GIFs below. You may also view the prototypes on Figma through this Link.

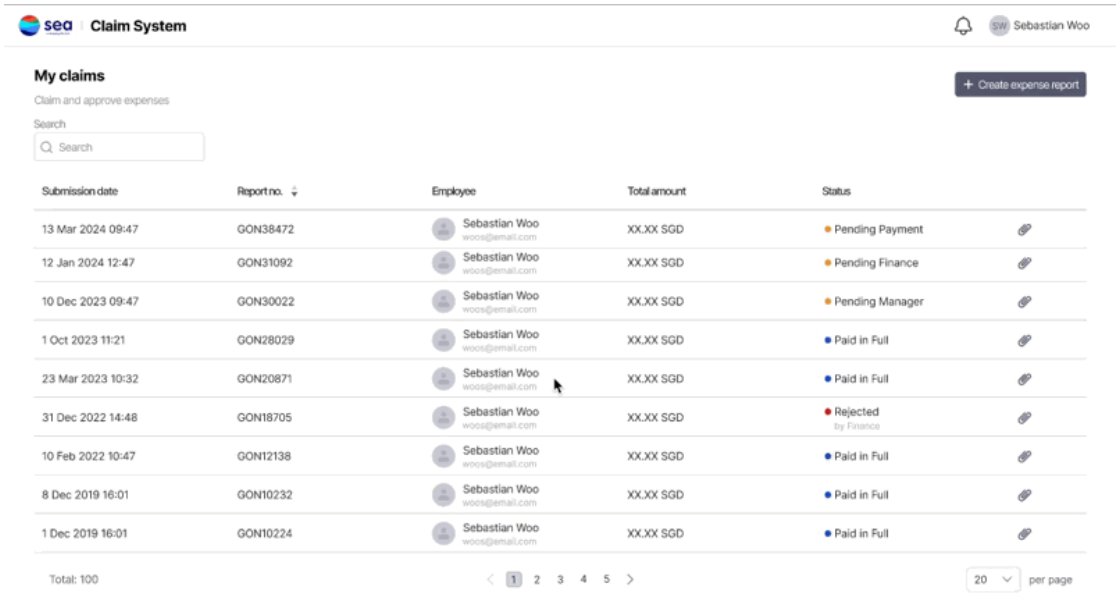
1. **Submitting a new Expense Report - Employee**



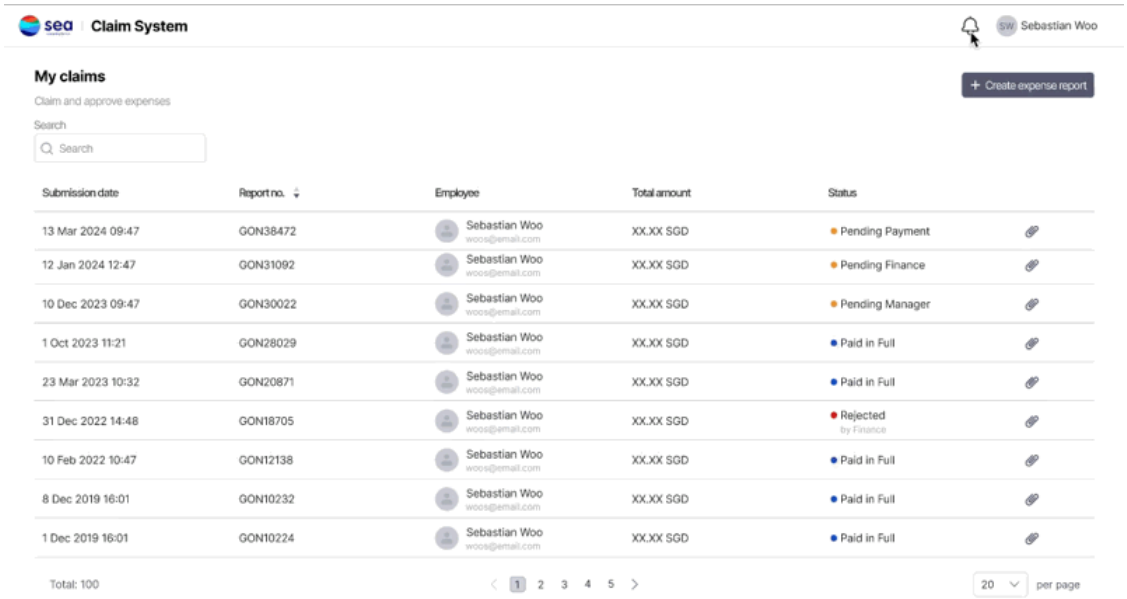
2. **Viewing and Editing an Expense - Employee**



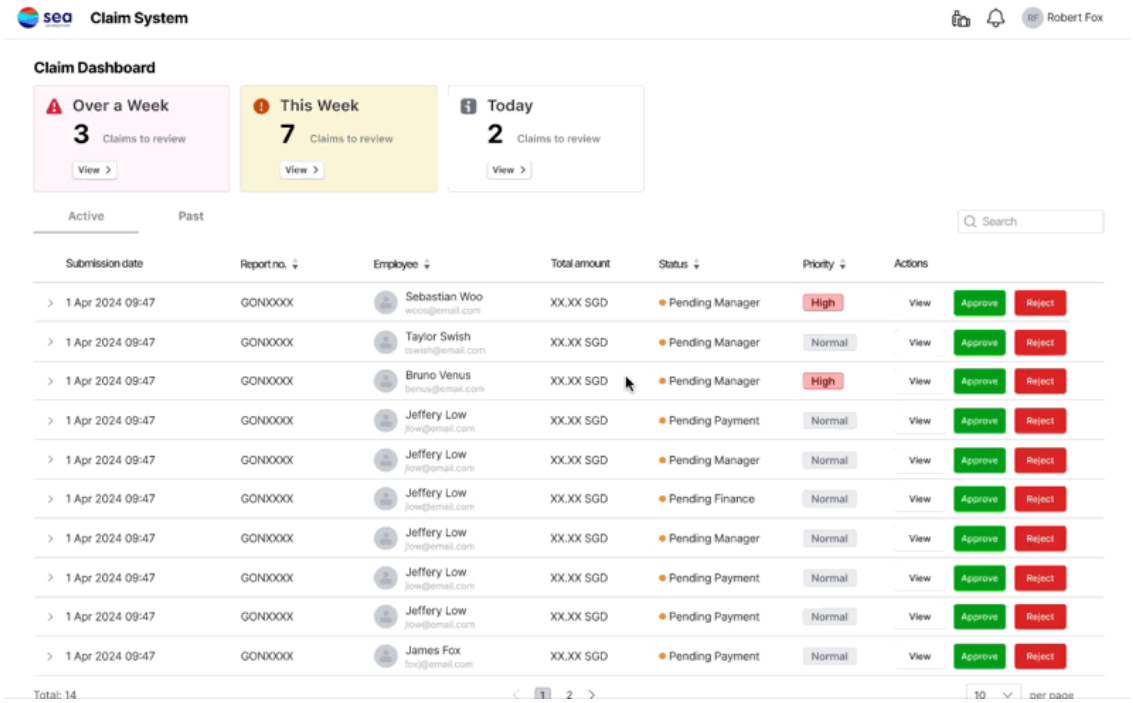
3. Edit and Resubmit Rejected Expense - Employee



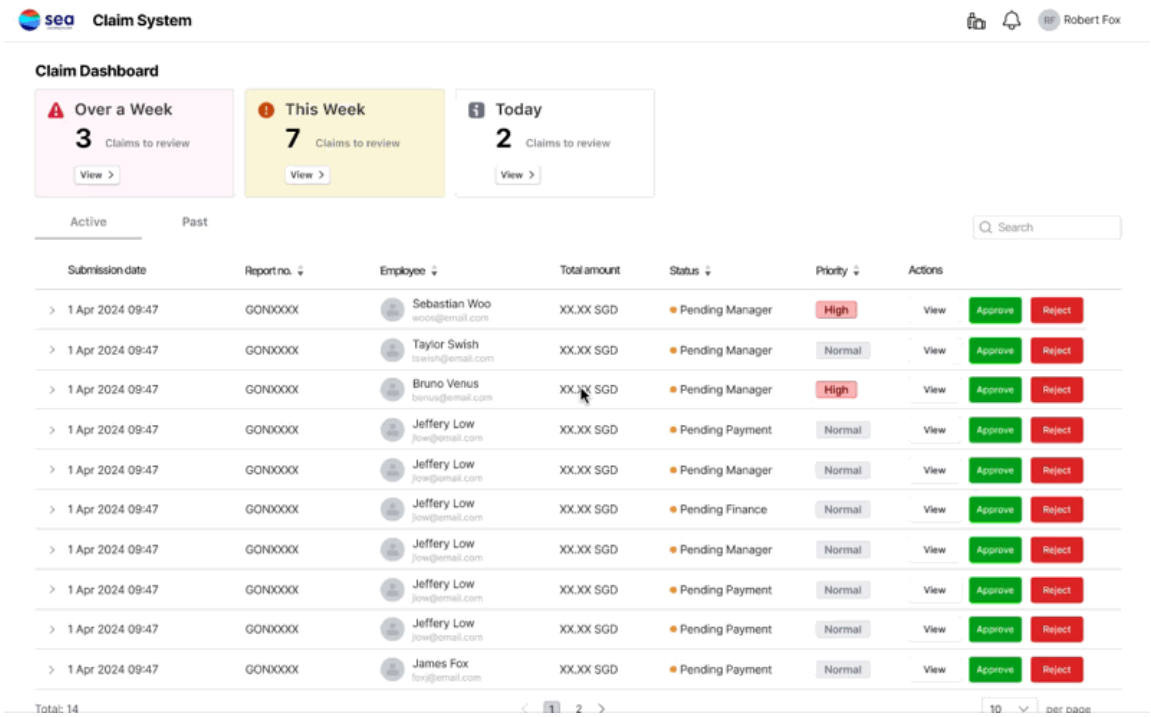
4. View Status Update via Notifications - Employee



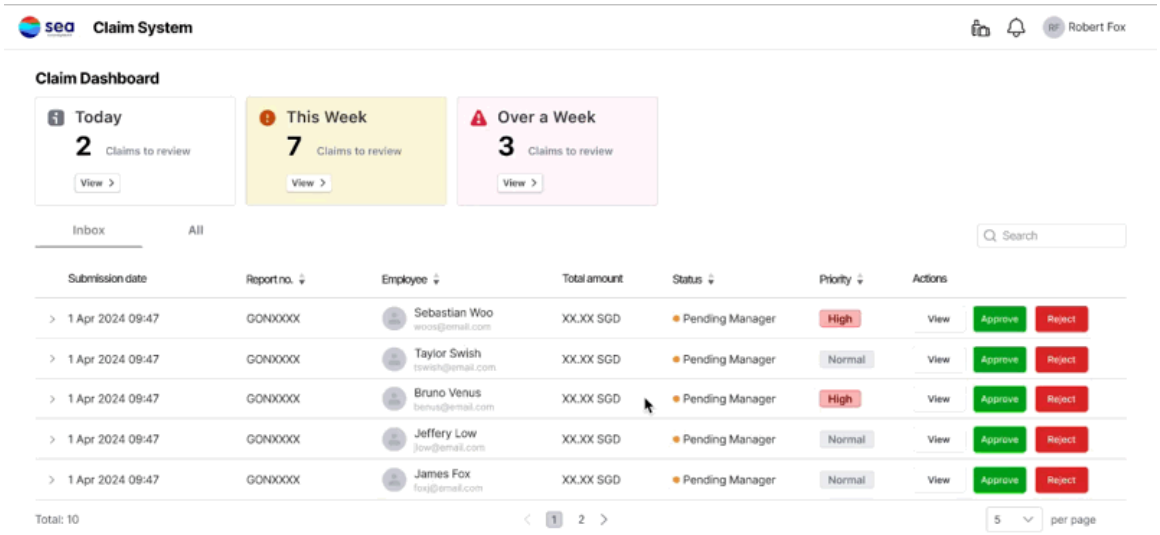
5. Viewing Pending Claims based on Time Elapsed - Manager



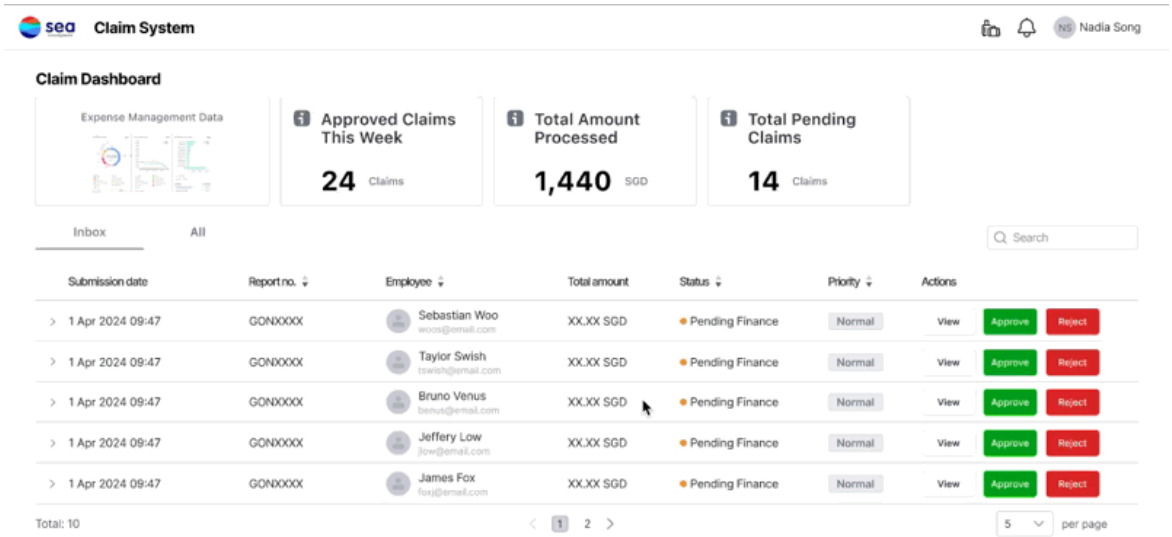
6. Quick View Expense Reports from Dashboard and Approve/ Reject - Manager



7. Leave Comment on Expense and Reject Report – Manager / Finance



8. Setting Up Away Mode – Manager / Finance



Conclusion and Future Work

Through comprehensive research and analysis, I have identified key areas of focus and ideated solutions aimed at enhancing the claim submission and approval process. By incorporating user-centric design principles and employing creative strategies, I am optimistic that the designed claim form and approval process will help to minimise delays, errors, and overall dissatisfaction with the claim system.

As this represents an initial iteration of the design process, given more time, I would prioritise conducting usability tests and A/B testing as it is a crucial step in the design process. By incorporating user feedback and data-driven insights from testing, I can then iteratively refine the design to ensure it delivers the optimal user experience and effectively fulfils its intended goals.

Thank you for reviewing my submission!