

Client: **MetLife**
Project: **Flexible Benefits Enrollment**
Deliverable: **Member Wireframes**

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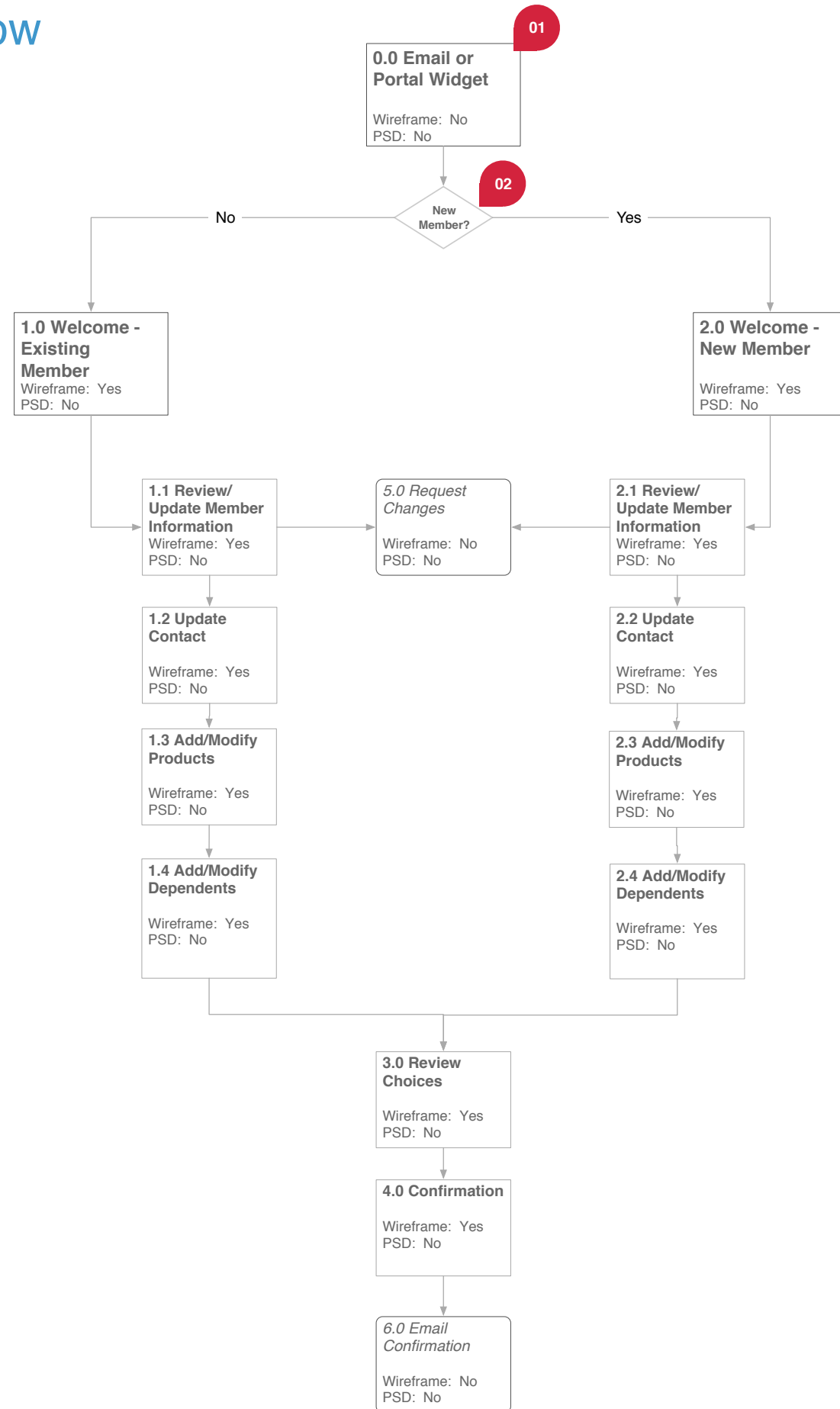
Document: MetLife_Member_Benefits.v.1.0.graffle

Table of Contents

Flexible Benefits Enrollment	3
Suggested Flow	4
0.0 Home	5
2.0 Member Information	6
2.2 Update Contact	7
2.3 Add/Modify Products	8
2.4 Add/Modify Dependents	9
2.4 Add/Modify Dependents 2	10
2.4 Add/Modify Dependents 3	11
2.4 Add/Modify Dependents 4	12
3.0 Review Choices	13
4.0 Confirmation	14
Thank You	15
Notes	16

Flexible Benefits Enrollment

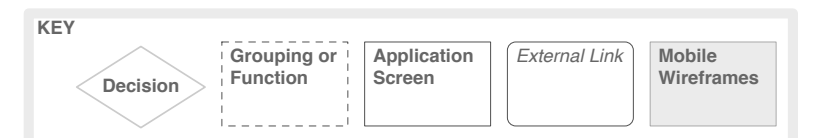
Suggested Flow



Design Annotations:

01 User can enter the flow either via the link in the email or through the portal widget.

02 There will be a slight difference of the content of the forms and welcome message depending on the new or existing user.



MetLife
Flexible Benefit Plan Enrollment

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Welcome to the Flexible Benefit Plan Enrollment

Welcome to Flexible Benefit Annual Enrollment

In two weeks before the enrollment begins, you are able to enroll and update choices for next year on our website. Once you complete the enrollment, your own benefit plan will be applicable during the whole plan year.

You won't be able to update any benefits till next plan year comes.

The company will open 1 week flexible benefit enrollment period every month to new employees who joined the company in the last month in order to provide the support to their selection and confirmation of their flexible benefit plan.

Total annual flexible benefit credits

Total annual flexible benefit credits is the funding source for you to purchase benefits. 1 credit equals RMB 1. Your total annual flexible benefit credits provided by company include 3 parts as below.

- Basic benefit credits: annual default insurance cost and health care cost;
- Supplemental Pension credits: Employer contribution for supplemental pension;
- Additional credits: this is not a regular credit allocation, it only applies to some eligible employees(details refers to 2011 communication materials by HR department), due to legacy problems caused by company benefits integration

Credits Summary

Basic Credits	\$ 1,000
Unused Basic Credits	\$ 600
Credits for Tailored Benefits	\$ 1,000
Credits Covered by Employer for Pension Program	\$ 10,000

Restore Defaults

Continue to Enrollment

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Design Annotations:

0_ UX design is based on the documents provided by MetLife.

1_Primary Navigation

- The primary navigation menu contains Home, Docs & Forms, Contact Us.
- Items in the menu will be highlighted on rollover and when selected.
- Each navigation item will link the user to the respective page.

2_Click To Call

- Functional requirements to be defined by MetLife.

3_Search

- is mentioned in BRD but details need to be defined.

4_Profile Menu

- Display the Member's name.
- On click, display drop down with the following options: Logout.
- Logout will log the user out of the application.

5_Standard Footer

6_Restore Defaults

- Disable on for user who are within default benefit choices
- Clicking on the icon creates a popup with explanation of Default Benefits.

7_Credits Summary

- Clicking on the icon will open a popup with the explanation of the credits.

8_Welcome Content

- Currently based on Employee Handbook. Needs to be revised.

2.0 Member Information

MetLife
Flexible Benefit Plan Enrollment

Policy Number: 0123456789 | Certificate Number: 0000000001 | Employer: Abc Corporation | Effective Date: mm/dd/yyyy

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Home | Enrollment | Docs & Forms | Contact Us

Enroll New Member

Member Info | Contact | Product | Dependents | Review Choices | Confirmation

Member Info

* Required Fields

First Name: Tom
Last Name: Waits
Policy Effective Period: 1/7/2014 - 6/30/2014
Enrollment Period: 15/30/2014 - 6/29/2014
DOB: 1/9/1970
Gender: Male
Marital Status: Married
Occupation: Clerk
ID Type: Passport
ID Number: 012345678
Salary: \$40,000.00 per year
Employee #: 034521
Hire Date*: 01/01/1999
Effective Date of Record*: 03/23/2003

[Request Changes to Personal Information](#)

Credits Summary

Basic Credits
\$ 1,000
Unused Basic Credits
\$ 600
Credits for Tailored Benefits
\$ 1,000
Credits Covered by Employer for Pension Program
\$ 10,000
[Restore Defaults](#)

[Continue to Contact](#)

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Design Annotations:

1_Pre-defined Data

- This is the information entered by HR personnel and can not be changed by user.

2_Change request

- User can request changes by clicking on the link. This will open a popup window with corresponding form. Use lightbox for the popup.


3_Additional explanation

- Clicking on the  icon creates a popup with explanation.

4_Account Snapshot

- Display Member's Policy Number, Certificate Number, Employer, and Effective Date. Details to be finalized by MetLife.
- Account Snapshot will be displayed on every page except home page.

5_Credits Summary

- Will be specific to they user and updated in the real time when benefits choices are made.
- Clicking on the  icon creates a popup with explanation.

6_Continue to....

- Will move user to the next step in the process.


2.2 Update Contact

The screenshot shows the 'Contact' step of the 'Enroll New Member' process. The page header includes the MetLife logo, policy details (Policy Number: 0123456789, Certificate Number: 0000000001, Employer: Abc Corporation, Effective Date: mm/dd/yyyy), and user information (Miguel Dalacios). A navigation bar shows 'Member Info', 'Contact', 'Product', 'Dependents', 'Review Choices', and 'Confirmation'. The 'Contact' section contains a form with fields for Phone (212-258-4587), Email (Jim@abc.com), and Address (123 Main St. Apt 4, Main City, DA 12345). A 'Continue to Product' button is highlighted with a red circle '2'. A 'Credits Summary' sidebar on the right lists: Basic Credits (\$1,000), Unused Basic Credits (\$600), Credits for Tailored Benefits (\$1,000), and Credits Covered by Employer for Pension Program (\$10,000). A 'Request Changes to Contact Information' link is also present.


Design Annotations:


- 1_Back to...**
- Link takes user back one step in the process.
- 2_Continue to...**
- Takes user to the next step in the process.

2.3 Add/Modify Products



Policy Number: 0123456789 | Certificate Number: 0000000001 | Employer: Abc Corporation | Effective Date: mm/dd/yyyy

CLICK TO CALL 

SEARCH BENEFITS OR OPTIONS 

Miguel Dalacios ▾

Home | Enrollment | Docs & Forms | Contact Us

Enroll New Member

Member Info | Contact | **Product** | Dependents | Review Choices | Confirmation

Product * Required Fields

Supplemental Pension Benefits Cost: \$ 2,000

Default: EE contribution 3% & ER contribution 4% \$0 i

Insurance & Medical Plan Cost: \$ 2,000

Term Life: Default: 36 x BMS, 150,000 coverage \$0 i

Accidental Death & Dismemberment: Default: 48 x BMS, 200,000 coverage \$0 i

Critical Illness: Default: 150,000 coverage \$0 i

Medical Plan: Default: plus hospital allowance \$0 i

Body Check-up: Default: \$290 (male) \$0 i

Credits Summary

Basic Credits
\$ 1,000

Unused Basic Credits
\$ 600

Credits for Tailored Benefits
\$ 1,000

Credits Covered by Employer for Pension Program
\$ 10,000

Additional Cost for Employee
\$ 1,000

Restore Defaults ?

Save for later ?

Cancel

Continue to Dependents

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Design Annotations:

1_ Use Accordion

- Allow user expand and collapse relevant groupings. By default, they are all expanded.

2_ Benefits Options

- New user has default options selected. Returning user has his/her options selected.

3_ Indicate Default Option

- Clearly indicate which is a default option.

4_ Explanation

- Popup window with explanations for each of the options.

5_ Additional Costs...

- Indicate additional costs for user when user makes choices other than default.

6_ Cost per Benefit

- Display additional cost change as per selected benefit.

7_ Total Cost per Selected benefits

- Display additional cost change as per selected benefits for a section.

8_ Save for later

- This will save users work up to this point. User will have a choice to continue working or to come back and finish enrollment at the later time.

9_ Cancel

- This will reset all user entries.

2.4 Add/Modify Dependents

MetLife
Flexible Benefit Plan Enrollment

Policy Number: 0123456789 | Certificate Number: 0000000001 | Employer: Abc Corporation | Effective Date: mm/dd/yyyy

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Home
Enrollment
Docs & Forms
Contact Us

Enroll New Member

Member Info Contact Product **Dependents** Review Choices Confirmation

Dependents

Currently, you have no dependents in your account. If you wish, you can add spouse and/or children:

Relationship:

Credits Summary

Basic Credits	\$ 1,000
Unused Basic Credits	\$ 600
Credits for Tailored Benefits	\$ 1,000
Credits Covered by Employer for Pension Program	\$ 10,000
Additional Cost for Employee	\$ 1,000

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Design Annotations:

1_Message

- Indicate if user has no dependents or have already dependents added to the system. Indicate who are the dependents and how many.

2_Relationship with Dependent

- It can be general term Spouse and Child or we can use more specific, Wife, Husband, Son, Daughter.

3_Additional Costs...

- Indicate additional costs for user when user makes choices other than default or cost is affected by dependents.

4_Add Dependent

- Will populate page with a corresponding form. There are different forms for a spouse and a child. Disable button when no selection is made.

5_No Dependent

- Will move user to the next step in the process, Review Choices.

2.4 Add/Modify Dependents 2

MetLife
Flexible Benefit Plan Enrollment

Policy Number: 0123456789 | Certificate Number: 0000000001 | Employer: Abc Corporation | Effective Date: mm/dd/yyyy

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Home
Enrollment
Docs & Forms
Contact Us

Enroll New Member

Member Info Contact Product **Dependents** Review Choices Confirmation

Dependents

▼ Spouse

1

Relationship: Wife [Request Changes to Personal Information](#)

First Name: Julia

Last Name: Roberts

ID Type: Passport

ID: 263534231

Date of Birth: 01/01/1999

Gender: Female

Email: Julia@abc.com

Term Life: \$0 [?](#)

Accidental Death & Dismemberment: \$0 [?](#)

Critical Illness: \$0 [?](#)

Medical Plan: \$0 [?](#)

Body Check-up: \$0 [?](#)

2 **3**

Credits Summary

Basic Credits
\$ 1,000

Unused Basic Credits
\$ 600

Credits for Tailored Benefits
\$ 1,000

Credits Covered by Employer for Pension Program
\$ 10,000

Additional Cost for Employee [?](#)
\$ 1,000

[?](#)

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Design Annotations:

1_Accordion Module

- Each dependent data is displayed in the accordion module. User can open and collapse this module.

2_Add Another Dependent

- At any time user can add another dependent. In that case the form data gets saved in temporary record for the later use.

3_Review and Enroll Member

- Will save the data to a temporary file and move user to the Review Choices step. If user didn't apply personal choices the default settings will be used.

\$0

2.4 Add/Modify Dependents 3

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Flexible Benefit Plan Enrollment

Policy Number: 0123456789 | Certificate Number: 0000000001 | Employer: Abc Corporation | Effective Date: mm/dd/yyyy

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Home
Enrollment
Docs & Forms
Contact Us

Enroll New Member

Member Info Contact Product **Dependents** Review Choices Confirmation

Dependents

* Required Fields

▶ Spouse (Wife, Julia Roberts) - remove **\$ 2,000**

Add another dependent:

Relationship:

Credits Summary

Basic Credits
\$ 1,000

Unused Basic Credits
\$ 600

Credits for Tailored Benefits
\$ 1,000

Credits Covered by Employer for Pension Program
\$ 10,000

Additional Cost for Employee **\$ 3,000**

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Design Annotations:

1_Dependent Data

- Is collapsed for the previous entries. Display dependent Relationship and Name, allow for the removal of the dependent and display additional costs for the employee.

- User can open and collapse this module when needed and see details.

2_Add Another User

- Process from the previous page gets repeated. Note that form and form choices will be different for spouse and children. Since we already have spouse and children added to the system, this pulldown menu should be populated with corresponding dependents.

2.4 Add/Modify Dependents 4

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Flexible Benefit Plan Enrollment

Policy Number: 0123456789 | Certificate Number: 0000000001 | Employer: Abc Corporation | Effective Date: mm/dd/yyyy

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Home
Enrollment
Docs & Forms
Contact Us

Enroll New Member

Member Info Contact Product **Dependents** Review Choices Confirmation

Dependents

- ▶ Spouse (Wife, Julia Roberts) - remove **\$ 2,000**
- ▼ Child (Son, Bill Gates) - remove **\$ 500**

Relationship: Son
First Name: Bill
Last Name: Gates
ID Type: State ID
ID: 12927236
Date of Birth: 01/02/2004
Gender: Male
Email: bill.gates@abc.com

[Request Changes to Personal Information](#)

Credits Summary

Basic Credits	\$ 1,000
Unused Basic Credits	\$ 600
Credits for Tailored Benefits	\$ 1,000
Credits Covered by Employer for Pension Program	\$ 10,000
Additional Cost for Employee	\$ 2,500
Restore Defaults	

Please note that the same benefit selection will apply to all children you will enter to the system.

Accidental Death & Dismemberment: None \$0
Critical Illness: 50,000 coverage \$200
Medical Plan: Enhanced Plan \$500
Body Check-up: Group Price \$0

Save for later ? Cancel Add Another Dependent Review and Enroll Member

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Design Annotations:

- 1_Display message...**
- that the same type of benefits will be used for all enrolled children.
- 2_Costs for each dependent**
- Indicate total costs for each of the enrolled dependents.
- 3_Request changes**
- Link allowing user to request updates if needed.
- 5_Add Another Dependent**
- Allows user to addf additional dependents.
- 6_Total Additional Cost**
- Display total additional cost for the member.

3.0 Review Choices

MetLife
Flexible Benefit Plan Enrollment

Policy Number: 0123456789 | Certificate Number: 0000000001 | Employer: Abc Corporation | Effective Date: mm/dd/yyyy

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Home
Enrollment
Docs & Forms
Contact Us

Enroll New Member

Member Info Contact Product Dependents **Review Choices** Confirmation

Member Info

[< Edit Member Info](#)

First Name: **Tom**
Last Name: **Waits**
Policy Effective Period: **1/7/2014 - 6/30/2014**
Enrollment Period: **15/30/2014 - 6/29/2014**
DOB: **1/9/1970**
Gender: **Male**
Marital Status: **Married**
Occupation: **Clerk**
ID Type: **Passport**
ID Number: **01020461524**
Salary: **\$40,000 per year**
Employee #: **123456789**
Hire Date: **11 / 25 / 2011**
Effective Date of Record: **1865374288**

Credits Summary

Basic Credits
\$ 1,000

Unused Basic Credits
\$ 600

Credits for Tailored Benefits
\$ 1,000

Credits Covered by Employer for Pension Program
\$ 10,000

Additional Cost for Employee **\$ 3,000** ?

Restore Defaults ?

Contact

[< Edit Contact](#)

Phone: **(686) 537 4288**
Email: **csmith@gmail.com**

[Cancel](#) [Submit Your Choices](#) **1**

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Design Annotations:

This page display all the choices selected by a member including personal information.

1_Submit Your Choices

- User can review and submit the enrollment data. This data will be saved as a temporary, changeable file, until the end of the enrollment period. During this period user can log back in and modify benefits choices.

4.0 Confirmation

MetLife
Flexible Benefit Plan Enrollment

Policy Number: 0123456789 | Certificate Number: 0000000001 | Employer: Abc Corporation | Effective Date: mm/dd/yyyy

[CLICK TO CALL](#) [SEARCH BENEFITS OR OPTIONS](#) Miguel Dalacios

Home
Enrollment
Docs & Forms
Contact Us

Enroll New Member

Member Info Contact Product Dependents **Review Choices** Confirmation

Confirmation

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean aliquet nisl id dui feugiat consectetur. Integer tellus sem, congue vitae ornare eget, egestas a sem. Quisque luctus non ipsum id tincidunt. Nunc sodales augue at dolor imperdiet, ac congue metus tincidunt. Curabitur pellentesque vulputate fermentum. In elementum est a nunc laoreet, pharetra pulvinar lorem ultrices. Nullam ut luctus nibh.

Vivamus orci ipsum, tincidunt vulputate dictum quis, lacinia quis urna. Mauris at urna nisl. Sed hendrerit mi eu est commodo pulvinar in vel nisl. In ac egestas nulla. Duis posuere quis nisl euismod vehicula. Fusce ultricies mi commodo risus iaculis, eu aliquet velit placerat. Sed et dui quis nulla eleifend semper quis id eros. Nulla facilisi. Maecenas rutrum adipiscing velit ac rutrum. Morbi tempor bibendum magna tristique volutpat. Vivamus tortor felis, consequat eget ultrices ut, viverra vel nisi. Nunc sed massa vitae neque interdum tempus at vel ante. Curabitur metus nisi, egestas at venenatis eu, pulvinar nec nisi. Vestibulum dolor quam, tristique et lacus sed, pharetra aliquet nunc.

[Go back to Benefits Enrollment](#) [Go to the Main Page](#) [Logout](#)

Credits Summary

Basic Credits
\$ 1,000

Unused Basic Credits
\$ 600

Credits for Tailored Benefits
\$ 1,000

Credits Covered by Employer for Pension Program
\$ 10,000

Additional Cost for Employee **\$ 3,000**

[Restore Defaults](#)

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Design Annotations:

- 1_Go back...**
- User can return to enrollment process to modify choices.
- 2_Go to...**
- User can go to the main portal page.
- 3_Logout**
- User can logout from the system.

Thank you

Contact:

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Notes

Based on BRD

The enrollment page of the eligible employee will be displayed with the following information:

- Employee Name (員工)
- Policy Effective Period (本年度彈性福利有效期)
- Enrollment Period (彈性福利注册期)
- Basic credits (基礎彈性福利積分總額)
- Used basic credits (本人已使用基礎彈性福利積分)
- Credits for tailored benefits (个性化福利积分总额)
- Credits covered by employer for pension program (补充养老金企业承担积分)
- Premium for Spouse/ Dependents (家屬所需保費)
- Basic benefits (主要保險福利)
 - * Benefit plan (保障)
 - * Options(选择)
 - * Credits required (所需信用額)
- Supplemental benefits (附加保險福利)
 - * Benefit plan (保障)
 - * Options(选择)
 - * Credits required (所需信用額)

Lastly, the following employee and spouse/dependents information should be capture in the Excel:

- Name (姓名)*
- Sex (性别)*
- Date of birth (出生日期)*
- Age (年齡)*
- ID type (证件类型)*
- ID number (证件号码)*
- Employee group (职业)*
- Email address*

Based on Employee annual

Insured unit information (items under the front bar with "*" must be filled)

- * Full name
- * Zip Code
- * Address: Provinces / autonomous regions / municipalities - City / District / County - District / County
- * Unit type: (business unit?)
 - State-owned (checkbox)
 - Collective (checkbox)
 - Private (checkbox)
 - Stock (checkbox) (Public company?)
 - Funded (checkbox) (Private?)
 - Party and government (checkbox)
 - Institutions (checkbox)
 - Social groups (checkbox)
 - Other.....(textbox)

- Industry Sector
- Operating Range
- * The total number of units
- Participate in social security cases (* professional liability insurance required)
 - Basic medical (checkbox)
 - Maternity leave (checkbox)

- Business license number
- Valid till
- * Organization Code
- Tax registration number
- Social Insurance Registration No.
- * Name of legal representative:
- Document Type
- ID Number
- Valid till
- * Company Contact Name
- Document Type
- ID Number
- Valid till
- * Contact Phone Unit
- Fax
- * Payment
 - o Wire transfer (checkbox)
 - o Check (checkbox)
 - o Other(textbox)

People's Bank of China announced over the same period the inhabitants of the benchmark interest rate demand deposits (checkbox)
Regulatory authorities agreed to allow the interest rate _% (checkbox)
Net public accounts pay
Yuan
Net pay personal account
Yuan
 See the list of insured

table columns

- * Insurance Plan Code
- * Name of insurance coverage (specific to the liability item)
- * Insured / Copies / grade (per person)
- Deductibles (yuan)
- Payout Ratio (%)
- Public insurance Use Limit (Per person) (Person)
- Insurance (per person)

Bottom table row

Total premiums
One hundred million thousand _____ pick ___ Bai Wan Bai _____ thousand dollar pickup _____ corner points
Note: If this page does not satisfy and please attach paper. Fill in this column is consistent with the format and requirements. And please affix the seal of the insured, as part of this proposal.

Page 2

Insurance matters

- * Policyholder / insured relationship
 - Hire (checkbox)
 - Other: (textbox)
- The number of proposed insured
Primary Insured Person: (textbox)
Joint insured: (textbox)
Total: (textbox)
- Effective Time Insurance Application
Year
Month
Day
- Payment method
Salaries
Pay when?
Monthly pay
Other
- Premium pay principle
Assume full insured unit (checkbox)
The insured bears the full (checkbox)
The insured and the insured unit shared (checkbox)
Protection criteria for the classification level
Uniform standards (checkbox)
Position rank (checkbox)
Jobs (checkbox)
Years of service (checkbox)
Salary (checkbox)
Other ways: (textbox)
- policy period
This year only (year, month, day)

More than one year of insurance
For life - To the age of expiry (____ years old male / female ____ years old)
How many years? - Other (textbox)
- Insurance account category insurance
Management Fee
The initial management fee proportion _%

Per annum way
People's Bank of China announced over the same period the inhabitants of the benchmark interest rate demand deposits (checkbox)
Regulatory authorities agreed to allow the interest rate _% (checkbox)
Net public accounts pay
Yuan
Net pay personal account
Yuan
 See the list of insured

table columns

- * Insurance Plan Code
- * Name of insurance coverage (specific to the liability item)
- * Insured / Copies / grade (per person)
- Deductibles (yuan)
- Payout Ratio (%)
- Public insurance Use Limit (Per person) (Person)
- Insurance (per person)

Bottom table row

Total premiums
One hundred million thousand _____ pick ___ Bai Wan Bai _____ thousand dollar pickup _____ corner points
Note: If this page does not satisfy and please attach paper. Fill in this column is consistent with the format and requirements. And please affix the seal of the insured, as part of this proposal.