

Client: **MetLife**
Project: **Flexible Benefits Enrollment Backend**
Deliverable: **EB Sales Wireframes**

Author: Pawel Tulin

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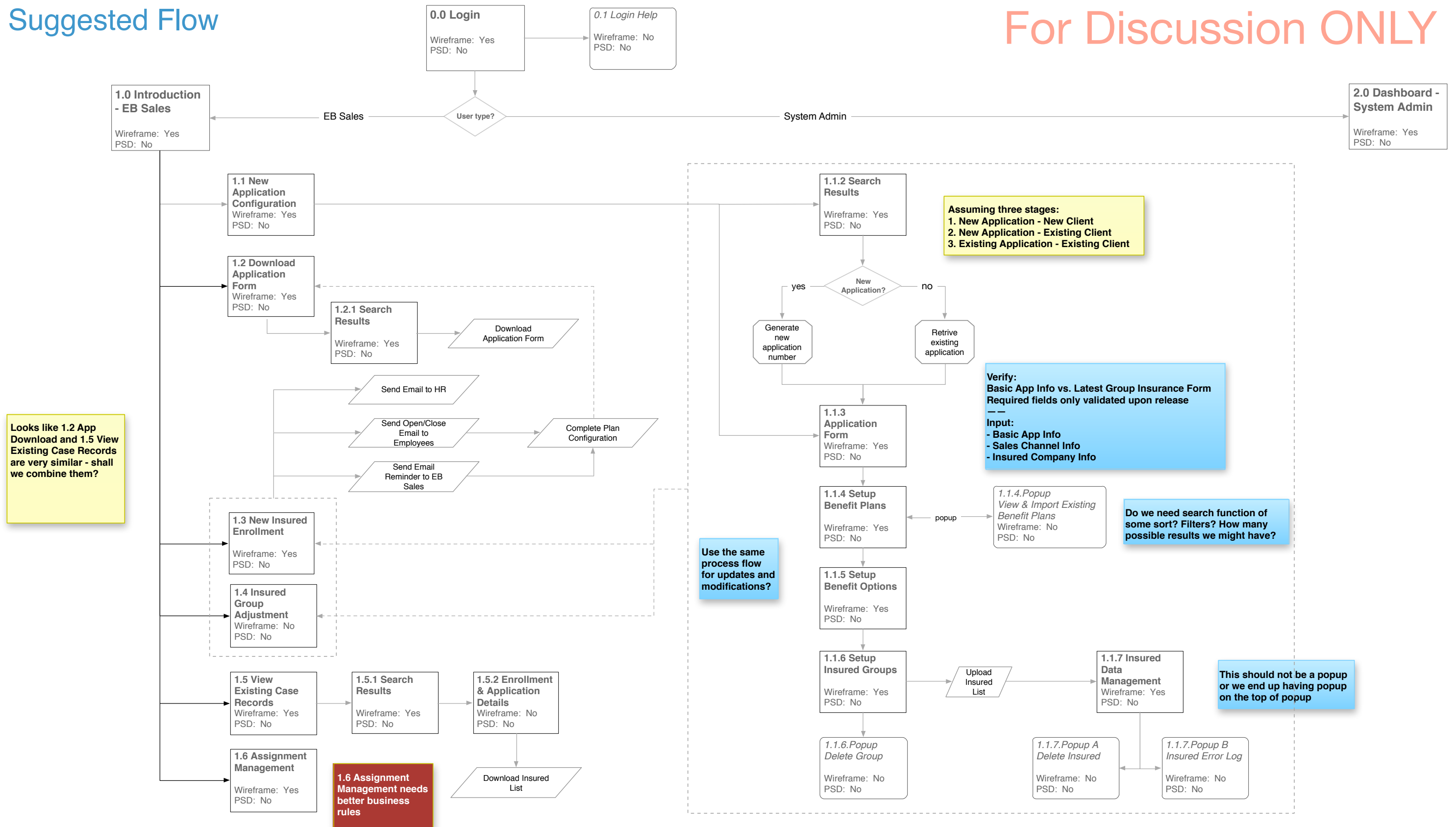
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TBD

Flexible Benefits Enrollment Backend

Suggested Flow

For Discussion ONLY



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MetLife
Flexible Benefit Plan Enrollment

Welcome to the
EBS Enrollment

Login

Password



[Help with login?](#) | [Registration](#)

Login Help and Registration can be standard from existing system

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Flexible Benefit Plan Enrollment

Welcome to the EBS Enrollment

Home
 New Application
 Download Forms
 New Enrollment
 Group Adjustment
 View Records

Introduction

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.

1
Configure New Application

2
Setup Benefits and Options

3
Setup Insured Groups

4
Manage Insured Lists

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- ▶ New Applications (10)
- ▶ Configuration Uncompleted (4)
- ▶ Completed Applications (11)
- ▶ Requests for Updates (2)
- ▶ Open Enrollments (0)
- ▶ Closed Enrollments (14)

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This illustrates steps needed to be taken to setup enrollment application before opening it

We will work on better explanation of the process here and also we should decide what information goes into the accordion modules. We will start with a clickable list of action items first

Simplified dashboard version. Indicates number of items in each stage and when accordion is open we can provide more information with direct links to the listed items. If this is the direction we are taking we should discuss what would be good to display there

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1.1 New Application Configuration

For Discussion ONLY

MetLife
Flexible Benefit Plan Enrollment

Welcome to the EBS Enrollment

New Application Configuration

Configure New Application | Setup Benefits and Options | Setup Insured Groups | Manage Insured Lists

Use Existing Plan | Create New Plan

Search for Existing Plan Configurations

Application # [] Company Name [] Application Status [Select]

Application Number	Company Name	Application Status	Date	
Application Number	Company Name	Application Status	Date	View Use as Template
Application Number	Company Name	Application Status	Date	View Use as Template
Application Number	Company Name	Application Status	Date	View Use as Template

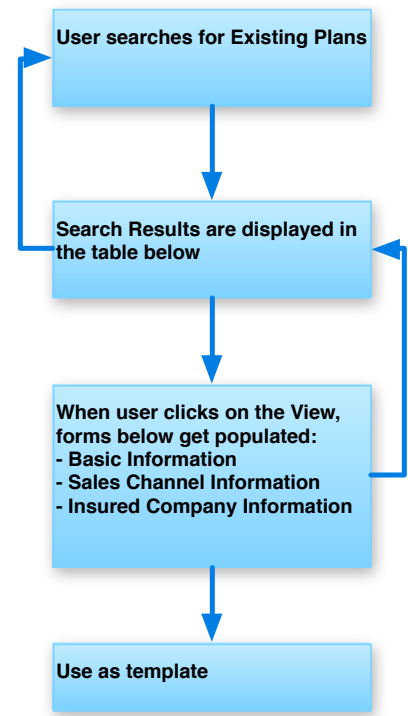
Basic Information | Sales Channel Information | Insured Company Information

We could add progress indicators for each step

Shall we use "View" as a popup or just repopulate information below? Alternatively we could just click on the Application Number to populate forms below.

Once user clicks on the application in the search results "Basic Information" accordion will open and form will be populated with the data. User can reused existing data, modify it or click on another application to populate it with different data.

The underlying idea here is that users of the system are already committed to the process. We will explain interface structure better as well as we will document this better. This concept reuses the same form to display search details and to work on creating new application. User can start either with the blank form - "Create New Plan" or use existing plan as a template- "Use Existing Plan"



Pros of using this pattern are that everything is in one page.
Cons: not very natural at first

1.1.3 New Application Form

For Discussion ONLY

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Welcome to the EBS Enrollment

New Application Configuration

Configure New Application | Setup Benefits and Options | Setup Insured Groups | Manage Insured Lists

Use Existing Plan | **Create New Plan** Required fields*

▼ Basic Information

Applicant / Insured relationship* ▾

No. of primary insured*

No. of subsidiary insured*

Total no. of insured*

Application effective date*

Type of payment* ▾

Premium payment responsibilities* ▾

Benefit level classification* ▾

Duration of benefit coverage

Initial management fee ratio

Interest calculation method

Public account premium payment amount

Personal account premium payment amount

Open enrollment duration*

Days before enrollment closure to send reminder messages to EB sales*

Display dependent benefit enrollment * ▾

Content displayed in enrollment home page*

Header 1*

Header 2*

Paragraph 1*

Paragraph 2*

Content displayed in dependent benefit enrollment page *

Paragraph*

[Validate](#)

► Sales Channel Information

► Insured Company Information

When user clicks on Create New Plan tab the search accordion is not displayed.


We can use blue icons if we need more information

We will add Save option for each accordion so user can either Save and move on or clicking Next will Save and move to the next step. I will rethink this in more details as it might be possible to do it in one button.

1.1.3 New Application Form 2

For Discussion ONLY

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Flexible Benefit Plan Enrollment

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Welcome to the EBS Enrollment

New Application Configuration

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Configure New Application | Setup Benefits and Options | Setup Insured Groups | Manage Insured Lists

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.

Use Existing Plan | **Create New Plan** Required fields*

▶ Basic Information ?

▼ Sales Channel Information ?

Management organization*	<input type="text"/>	Name and reference no. of broker sales	<input type="text"/>
Risk assessment no.	<input type="text"/>	Name and reference no. of cross-selling sales	<input type="text"/>
Quotation batch no.	<input type="text"/>	Commission share	<input type="text"/>
Extension of policy	<input type="text" value="Select"/>	Name of the packaged products/benefit plans	<input type="text"/>
Last policy no.	<input type="text" value="MM/DD/YYYY"/>	Arrangement in the share of commission and sales	<input type="text"/>
Sales channels*	<input type="text" value="Select"/>	Additional note	<input type="text"/>
Name and reference no. of broker company	<input type="text"/>		
Name and reference no. of Group Insurance Sales*	<input type="text"/>		

▶ Insured Company Information ?

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Do we need a separate Validate function? Validation is only required at the end but this might help

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1.1.3 New Application Form 4

For Discussion ONLY

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Welcome to the EBS Enrollment

New Application Configuration

Home
New Application
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View Records

Configure New Application | Setup Benefits and Options | Setup Insured Groups | Manage Insured Lists

Use Existing Plan | Create New Plan Required fields*

▶ Basic Information ?
▶ Sales Channel Information ?
▼ Insured Company Information ?

Client reference no
Company full name (same as registered name)*
Postal code*

Legal representative

Name*
Type of identification
ID no

Tax registration number
Social insurance registration number
Payment method*

Additional notes
Special agreement
Health declaration

[Validate](#)


Do we need a separate Validate function? Validation is only required at the end but this might help

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1.1.3 New Application Validation

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Welcome to the EBS Enrollment

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Configure New Application | Setup Benefits and Options | Setup Insured Groups | Manage Insured Lists

Use Existing Plan | Create New Plan Required fields*

▶ Basic Information ?
▶ Sales Channel Information ?
▼ Insured Company Information ?

Client reference no	<input type="text"/>	Legal representative	
Company full name (same as registered name)*	<input type="text"/>	Name*	<input type="text"/>
Postal code*	<input type="text"/>	Type of identification	<input type="text"/>
		ID no	<input type="text"/>

Tax registration number	<input type="text"/>	Payment method*	<input type="text" value="Select"/>
Social insurance registration number	<input type="text"/>		
Additional notes	<input type="text"/>		
Special agreement	<input type="text"/>		
Health declaration	<input type="text"/>		

[Validate](#)

This will happen when you click Validate

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1.1.3 New Application Next Validation

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Welcome to the EBS Enrollment

New Application Configuration

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Group Adjustment
View Records

Configure New Application | Setup Benefits and Options | Setup Insured Groups | Manage Insured Lists

Use Existing Plan | Create New Plan

Basic Information
Sales Channel Information
Insured Company Information

Client reference no
Company full name (same as registered name)*
Postal code*
Type of identification
ID no

Tax registration number
Social insurance registration number
Additional notes
Special agreement
Health declaration

Payment method* Select ▾

Validate | Next

Required Fields

We have found 3 required fields missing. You will not be able to open an enrollment for this plan until you provide missing information.

We have marked those fields in red.

You can save this form and continue working on it in the future without correcting all the errors at this time but you will be promoted again to update those fields before opening an enrollment.


[Correct errors first](#) | [Next](#)

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This will happen when you click Next. I based it on the BRD but maybe we can do it better if you can refine business rules. What is that we are trying to accomplish here?

1.1.4 Setup Benefit Plan and Options

For Discussion ONLY


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Flexible Benefit Plan Enrollment

Welcome to the EBS Enrollment

New Application Configuration

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Configure New Application ✔

Setup Benefits and Options

Setup Insured Groups

Manage Insured Lists

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Required fields*

▼ Search for Existing Plans

Benefit Item Code # Name of the Benefit Plan Type of the Benefit Plan

[Reset and Start Over](#)

Search Results (32) <...3.4.5...>

Benefit Item Code	Name of the Benefit Plan	Type of the Benefit Plan	Insurance Type	Insurance Products	
Number	Name	Application Status	<input type="checkbox"/> Type 1	<input type="checkbox"/> Product Name <input type="checkbox"/> Product Name	Use as Template
			<input type="checkbox"/> Type 2	<input type="checkbox"/> Product Name <input type="checkbox"/> Product Name	Use as Template
Number	Name	Application Status	<input type="checkbox"/> Type 1	<input type="checkbox"/> Product Name <input type="checkbox"/> Product Name	Use as Template
			<input type="checkbox"/> Type 2	<input type="checkbox"/> Product Name <input type="checkbox"/> Product Name	Use as Template
Number	Name	Application Status	<input type="checkbox"/> Type 1	<input type="checkbox"/> Product Name <input type="checkbox"/> Product Name	Use as Template

<...3.4.5...>

▶ Benefit Plan Setup

▶ Benefit Option Setup

We can indicate steps that passed validation

What are the search inputs?

Based on BRD user always needs to start with search and reuse the items that are already in the system. Tasha suggested that we might have to start with the blank form in which case we need to define the process - how user gets a list of available products to choose from. Otherwise the mechanism is the same as in previous section. User does search, chooses item form search results and this populates accordions below

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1.1.4 Setup Benefit Plan and Options 2

For Discussion ONLY

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Flexible Benefit Plan Enrollment

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Welcome to the EBS Enrollment

New Application Configuration

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Configure New Application **Setup Benefits and Options** **Setup Insured Groups** **Manage Insured Lists**

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*Required fields**

► Search for Existing Plans

▼ Benefit Plan Setup

Benefit Item Code # Name of the Benefit Plan Type of the Benefit Plan

Insurance Type	Insurance Products
Type 1	Product Name Product Name
Type 2	Product Name Product Name
Type 3	Product Name

[Remove All](#) [Save Plan](#) [Save Plan and Setup Options](#)

► Benefit Option Setup



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We need to clarify business logic here. There is not enough information how the search results are looking and how this translates to insurance and product list. This design here is my initial draft to start the discussion and is not based on BRD

Add popup for delete confirmation? Do we use infinite scrolling or pagination?

1.1.5 Setup Benefit Plan and Options 3


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Flexible Benefit Plan Enrollment

Welcome to the
EBS Enrollment

New Application Configuration

[Configure New Application](#) 
[Setup Benefits and Options](#)
[Setup Insured Groups](#)
[Manage Insured Lists](#)

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*Required fields**

▶ Search for Existing Plans

▶ Benefit Plan Setup

▼ Benefit Option Setup

Benefit Item Code #
Benefit Option Code #
Name of the Benefit Option

Default Option Indicator
Remarks

Insurance Type	Insurance Products	Coverage	Other Method for Coverage	Premium Calculation Method	Premium	Deductible	Loss Ratios
Type 1	Product Name	<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Product Name	<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Type 2	Product Name	<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Product Name	<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Type 3	Product Name	<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Clear All
Save Options



Verify table columns

We need to clarify business logic here. There is not enough information how the search results are looking and how this translates to insurance and product list. This design here is my initial draft to start the discussion and is not based on BRD

This wireframe does not represent the visual design.

1.1.6 Setup Insured Groups

For Discussion ONLY



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Flexible Benefit Plan Enrollment

Welcome to the
EBS Enrollment

New Application Configuration

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Configure New Application 

Setup Benefits and Options 

Setup Insured Groups

Manage Insured Lists

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Required fields*

▼ Create Insured Group

Insured Group Code

Name of Insured Group




Additional Underwriting

Type of the Benefit Plan

Benefit Option

[Clear All](#) | [Add Another Benefit](#)

▼ Current Groups

Insured Group Code	Insured Group Name	Benefit Plans	Benefit Options	Additional Underwriting?
 12345	Group Name	Plan A	A, B, C	Yes
	Group Name	Plan B	B, C	
 12345	Group Name	Plan A	C	Yes
	Group Name	Plan B	A, B, C	
 12345	Group Name	Plan B	A, B, C	No


We didn't have time to discuss this in details and again I based it on my interpretation of BRD. I assumed that Group Code is generated automatically but I didn't have enough information how to assign Plan and Option here. Also, what columns we should display in the table

Multiple selections in the pulldown and adding another row for benefit

1.1.7 Insured Data Management

For Discussion ONLY

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Welcome to the EBS Enrollment

New Application Configuration

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Configure New Application ✓ **Setup Benefits and Options** ✓ **Setup Insured Groups** ✓ **Manage Insured Lists**







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*Required fields**

▼ Upload Insured Lists

File Name ▾

▼ Insured Group A Download

Insured Group Code	First Name	Last Name	Reference Number	Id Number
12345	First Name	Last Name	 00000000	00000000
	First Name	Last Name	 00000000	00000000
	First Name	Last Name	 00000000	00000000
	First Name	Last Name	 00000000	00000000
	First Name	Last Name	 00000000	00000000
	First Name	Last Name	 00000000	00000000

► Insured Group B Download

► Insured Group C Download

[Download All Lists](#)


This wireframe does not represent the visual design.

This is used to attached employee lists to groups (and remove them). Again, not enough information in BRD. We can remove employee here but maybe we need as employee details page before making this decision?


Add popup for delete confirmation? Do we use infinite scrolling or pagination?

1.2 Download Forms

For Discussion ONLY



Flexible Benefit Plan Enrollment

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Welcome to the EBS Enrollment

Download Application Forms and Insured Lists

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.

▼ Search for Existing Application Cases

Application # Company Name Application Form #

Show ▾

Application Number	Company Name	Application Form #	Open	Close	Download
Application Number	Company Name	Application Status	Date	Date	Application List
Application Number	Company Name	Application Status	Date	Date	Application List
Application Number	Company Name	Application Status	Date	Date	Application List
Application Number	Company Name	Application Status	Date	Date	Application List
Application Number	Company Name	Application Status	Date	Date	Application List

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Is this the same as 1.5 View Existing Records?


Do we need to indicate for the supervisor account who's other records are?

How should the search results table look like?


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1.3 Open/Close Enrollment

For Discussion ONLY



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Welcome to the EBS Enrollment

New Enrollment

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Show

Application Number	Company Name	Application Status	Open	Close	
Application Number	Company Name	Application Status	Date	Date	Open Enrollment
Application Number	Company Name	Application Status	Date	Date	Complete Configuration
Application Number	Company Name	Application Status	Date	Date	Open Enrollment
Application Number	Company Name	Application Status	Date	Date	Open Enrollment
Application Number	Company Name	Application Status	Date	Date	Complete Configuration

When do we define open/close dates and can user change it here?

Also, do we need lookups and shall we just open a form or popup for that?

How should the search results table look like? Also, we need to clarify open/close process - we probably should allow user to do it from here as well.... Also, we need to add distinction between Supervisor applications and normal user


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1.5 View Existing Case Records

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View Existing Case Records

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Search for Existing Application Cases

Application # Company Name Application Form #

Application Type Application Status

[Reset and Start Over](#)

Search Results (32) ◀...3.4.5...▶

Application Number	Company Name	Application Form #	Type	Status	Download
Application Number	Company Name	Form #	Medical	Open	Application I List
Application Number	Company Name	Form #	Dental	Closed	Application I List
Application Number	Company Name	Form #	Dental	Effective	Application I List
Application Number	Company Name	Form #	Medical	Closed	Application I List
Application Number	Company Name	Form #	Medical	Closed	Application I List

◀...3.4.5...▶

How should the search results table look like?

Do we need to indicate for the supervisor account who's other records are?

What are the table columns?
Do we need lookup for Application Number click? It would display in the popup but I would need info what goes there...
Download will download corresponding form in Excel
Do we need Company lookup?


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1.6 Assignment Management

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NEEDS DISCUSSION

Assignment Management

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Search for Existing Application Cases

Application # Type of assignment

User ID User name

Management organization [Reset and Start Over](#)

Search Results (32) ◀...3.4.5...▶

Application #	Type of Assignment	User ID	User Name	Management Organization	Owners
Application #	Type	User ID	User Name	Management Organization	Change Add
Application #	Type	User ID	User Name	Management Organization	Change Add
Application #	Type	User ID	User Name	Management Organization	Change Add
Application #	Type	User ID	User Name	Management Organization	Change Add
Application #	Type	User ID	User Name	Management Organization	Change Add

◀...3.4.5...▶

How should the search results table look like? There are no business rules about this section. Should this be only accessible to a supervisor users? This need serious rethinking

Not very sure what the workflow here is:

1. Find Application
2. Reassign to different user
3. Reassign to multiple users


What about changing supervisor?

Do we first open application details and then manage users from there? This would require different workflow then BRD. Can we list all possible users in the multiple choice pulldown? Use autocomplete?


What are the possible values?

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Welcome to the
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Manage Users

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Existing Users | **Create New User**

▼ Search for Existing Users

User ID User name

Management organization Effective date

[Reset and Start Over](#)

Search Results (32) ◀...3.4.5...▶

User ID	User name	Management organization	Effective date	User status	User description	Supervisory accounts	
User ID	User name	Management organization	Effective date	User status	User description	Supervisory accounts	Reset Password Disable Delete
User ID	User name	Management organization	Effective date	User status	User description	Supervisory accounts	Reset Password Enable Delete
User ID	User name	Management organization	Effective date	User status	User description	Supervisory accounts	Reset Password Disable Delete
User ID	User name	Management organization	Effective date	User status	User description	Supervisory accounts	Reset Password Disable Delete
User ID	User name	Management organization	Effective date	User status	User description	Supervisory accounts	Reset Password Disable Delete


◀...3.4.5...▶

▶ **User Details**


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What are the table columns?
Values in the cells?



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Manage Users

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Existing Users | **Create New User**

▶ Search for Existing Users

▼ User Details

User ID	<input type="text" value="12345"/>	User name	<input type="text" value="John Doe"/>
Management organization	<input type="text" value="China Gold Corp."/>	Effective date	<input type="text" value="01/10/2014"/>
User Status	<input type="text" value="Active"/>	Password	<input type="text"/>
Supervisory accounts	<input type="text" value="No"/>	User description	<input type="text"/>

[Deactivate](#) | [Delete](#) |

What are the possible values?


Is password visible?

Use autocomplete to help with fields? Like Management Organization?


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Manage Users

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Existing Users | **Create New User**

User Details

User ID	12345	User name	<input type="text" value="John Doe"/>
Management organization	<input type="text" value="China Gold Corp."/>	Effective date	<input type="text" value="01/10/2014"/>
User Status	<input type="text" value="Active"/>	Password	<input type="text"/>
Supervisory accounts	<input type="text" value="No"/>	User description	<input type="text"/>

[Reset](#)

What are the possible values?
Is password visible?

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Thank you

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