

HELLO.

I'm Liang Zhao. 🙌

A Senior UX Designer @ Morgan Stanley.

■ NICE TO MEET YOU

Redesign Manage Employee Function

People problem · Iteration · Outcome · Learning

DESIGN PROCESS



TEAM + RESPONSIBILITIES

My Team

- 1 Project manager
- 3 Stakeholders
- 2 Product owners
- 5 Developers

My Roles

- User research
- Wireframe + Prototype + Visual design
- User testing
- Design quality control

PEOPLE PROBLEM ITERATION OUTCOME LEARNING

Insperity

Search...

MC GUIRE MILLARE

MY ACCOUNT

Paycheck

Benefits

401(k)

Time and Attendance

Training

Performance

COMPANY

Payroll

Manage Time

Manage Employees

Organizational Planning

Manage Companies

Organizational Planning - Corporate

Manage Performance

Reporting

My Tasks

Create Task | Manage Tasks

Good afternoon! All tasks are complete. Best day ever!

Paycheck

Paydate: 07/13/2018

Net Pay

\$*****. **

Current Earnings *****

Current Deductions *****

Current Taxes *****

W-4 W-2

PAYCHECK DETAILS

401(k)

There is no data available at this time.

MarketPlace

Great employee deals! Start shopping!

SHOP NOW

Performance Reviews

Manage and track employee goals and performance.

REVIEW NOW

Time

Plan	Available	Used	Balance
	24 Hours	0 Hours	24 Hours
Other Employees Sick Policy			

As of 03/27/2019

PTO DETAILS

Benefits

You have an enrollment opportunity.

ENROLL

Coverage

Medical	UnitedHealthcare Choice Plus 500
---------	----------------------------------

Insperity

LIANG ZHAO

Log Off

Internal Only

Insperity Premier

Search

Internal Only

IUO - Benefits

IUO Forms

Job Aids

2018 Benefits Bulletins

2017 Benefits Bulletins

2017 Medical Documents

Benefits Manual

2018 Medical Documents

2017 Welfare Documents

2018 Welfare Documents

Plan Availability By State

IUO Benefits

About Benefits

2017 - Benefits Bulletins

2017 - Medical Documents

2017 - Welfare Documents

2018 - Benefits Bulletins

2018 - Medical Documents

2018 - Welfare Documents

2018 Benefits Overview

Benefits Manual

Job Aids

Plan Availability By State

Plan Information

2019 BAAG Pkg Summaries

Select One

All 2019 BAAG Summary Flipbook Links

Freedom Premier (2019)

Freedom Choice (2019)

2018 BAAG Pkg Summaries

Select One

2018 COBRA Rates

Select One

Quick Links

Benefits IUO - Forms

Insperity Application Portal

IUO - Client Onboarding

UHC Programs and Services Information

UnitedHealth Allies Discount Program

View More

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Manage Performance

Regulatory and Compliance

Forms and Policies

Home > Manage Employees > Employees

Manage Employees

EMPLOYEES HISTORY MASS UPDATE

SEARCH

All

All Active Terminated

Last Name	First Name	Middle Name	Job Title	Hire Date	Reports to	Company	Status
ABADJIAN	FILLSTANTANT	LYNN	TRACTOR WASHER	9/23/2015		GREEN COUNTRY EQUIPMENT, LLC	Active
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Insperity

SEARCH...

MC GUIRE MILLARE

MANAGE EMPLOYEES

Summary

Personal

Employment

Company

Position

Compensation

Withholdings

Direct Deposit

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Termination

Home > Manage Employees > Summary

ABADJIAN, FILLSTANTANT LYNN

Employee ID: 2556128 Company ID: 2923400

Personal Summary

Last Name ABADJIAN

First Name FILLSTANTANT

Middle Name LYNN

Date of Birth 10/16

Insperity Employee # 2556128

Social Security # XXX-XX-1905

Home Address

Street Address PO BOX 392

Address Line 2

City GOODWELL

State OK

Zip 73939-0392

County TEXAS

Phone

Mobile (928) 414-1064

Fax

Email toledoamber@gmail.com

Emergency Contact

Related Documents

Change of Status

Employment Verification

FLSA Test

State Unemployment

Contact Us

Training Video

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Manage Employees

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SEARCH All

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ABROITZ	MABEL	D	SVC WRITER	12/13/2005		GREEN COUNTRY EQUIPMENT, LLC	Active
ACHILLI	DARIJAN	SUE	ASSOCIATE-PROJECT SERVICES	7/14/1988	RAYGANI, ARA	SCHOOL SPECIALTY, INC.	Active
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Insperity

SEARCH...

MCGUIRE MILLARE

MANAGE EMPLOYEES

Summary

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Home > Manage Employees > Summary

ABADJIAN, FILLSTANTANT LYNN

Employee ID: 2556128 Company ID: 2923400

Personal Summary

Last Name ABADJIAN

First Name FILLSTANTANT

Middle Name LYNN

Date of Birth 10/16

Insperity Employee # 2556128

Social Security # XXX-XX-1905

Home Address

Street Address PO BOX 392

Address Line 2

City GOODWELL

State OK

Zip 73939-0392

County TEXAS

Phone

Mobile (928) 414-1064

Fax

Email

toledoamber@gmail.com

Emergency Contact

Related Documents

Change of Status

Employment Verification

FLSA Test

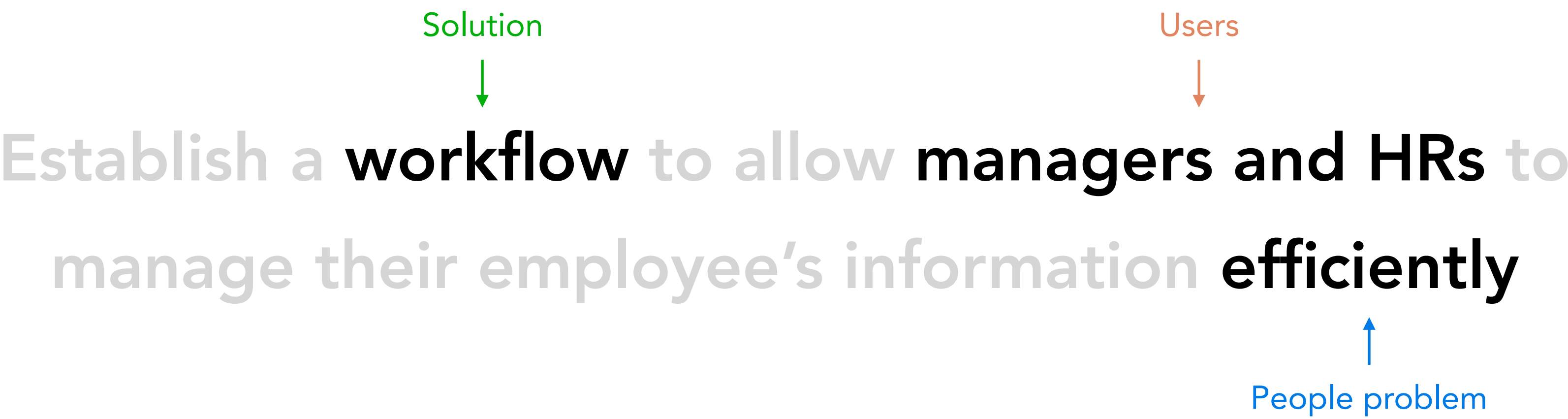
State Unemployment

Contact Us

Training Video

PEOPLE PROBLEM ITERATION OUTCOME LEARNING

**Establish a workflow to allow managers and HRs to
manage their employee's information efficiently**



Original dashboard

Insperity

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Manage Employees

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ACHOE	THANUSHRI	R	PARTS HELPER	1/17/2001		GREEN COUNTRY EQUIPMENT, LLC	Active

Original employee detail page

Insperty

SEARCH...

MCQUIRE MILLARE

MANAGE EMPLOYEES

Summary

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Termination

Home > Manage Employees > Summary

ABADJIAN, FILLSTANTANT LYNN

Employee ID: 2556128 Company ID: 2923400

Personal Summary

Last Name	First Name	Middle Name
ABADJIAN	FILLSTANTANT	LYNN
Date of Birth	Insperty Employee #	Social Security #
10/16	2556128	XXX-XX-1905

Home Address

Street Address	Address Line 2		
PO BOX 392			
City	State	Zip	County
GOODWELL	OK	73939-0392	TEXAS
Phone	Mobile	Fax	
	(928) 414-1064		
Email			
toledoamber@gmail.com			

Emergency Contact

Related Documents

[Change of Status](#)

[Employment Verification](#)

[FLSA Test](#)

[State Unemployment](#)

[Contact Us](#)

[Training Video](#)

Position Title: 		Department & Location: 		Project Code: 	
Type of Position: <input type="checkbox"/> New <input type="checkbox"/> Replacement		If Replacement, Name of Person Replacing: 		Posting: <input type="checkbox"/> Internal <input type="checkbox"/> External	
Number of Openings:					
Reports To (Name, Title): 		Position Category: <input type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt		Position Status: <input type="checkbox"/> Full-time <input type="checkbox"/> Part-Time <input type="checkbox"/> Regular <input type="checkbox"/> Temporary	
TDFPS Check Required? <input type="checkbox"/> Yes <input type="checkbox"/> No	Pay Rate/Range:		Work Hours/Days: 	Hours Per Week: 	
Required Qualifications (include <u>minimum</u> education, training, work experience, travel, skills, etc. <u>required</u> for this position):					
Preferred Qualifications (indicate the <u>preferred</u> education, training, work experience, skills, etc.):					
Description of the Position to be filled (describe the duties and responsibilities – <u>attach an approved job description for this position</u>):					
Additional Comments:					
PLEASE DIRECT RESUMES TO:					
Name:			Title:		
Email Address:			Phone Number:		
Signatures and Approvals:					
Program Manager: 			Date: 		
Director: 			Date: 		
Vice President: 			Date: 		
Received in Human Resources by: 			Date: 		

EMPLOYEE INFORMATION – Complete all fields.

First Name	Middle Name	Last Name	Employee ID No. OR ➡	Last 4 Digits of Social Security No.
Effective Date of Change (mm/dd/yyyy)	Client Company Name		Client Number	

JOB DESCRIPTION CHANGE/TRANSFER - Enter changes and new information only.

New Job Category <input type="checkbox"/> Executive/Senior Level Official and Manager <input checked="" type="checkbox"/> First/Mid Level Official and Manager <input type="checkbox"/> Professional <input type="checkbox"/> Technician <input type="checkbox"/> Sales Worker <input type="checkbox"/> Administrative Support Worker <input type="checkbox"/> Craft Worker <input type="checkbox"/> Operative <input type="checkbox"/> Laborer and Help <input type="checkbox"/> Service Worker									
New Job Title			New Job Function (if different from job title)						
New Benefit Class		New Billing Group		New Workers' Comp Code		Workers' Comp Audit Request <input type="checkbox"/>			
New Department Code (alpha and/or numeric)			New Location Code (alpha and/or numeric)			New Supervisor			
Physical Address	Street Address		City		County	State	ZIP	Insperty Use Only ➡	Address Code
Worksite where employee works									
	Worksite Location is (check one): <input type="checkbox"/> Actual Client Location <input type="checkbox"/> Offsite Location <input type="checkbox"/> Employee's								
Check Delivery where employee's check is delivered									
	Reporting where employee's supervisor is located								
Print Supervisor Name									
Employee Work Email Address						Work Phone Number		Ext.	
Change Client Number From To						Work Fax Number			
Change Insperty Hire Date (mm/dd/yyyy) From To						Work Cell Number			

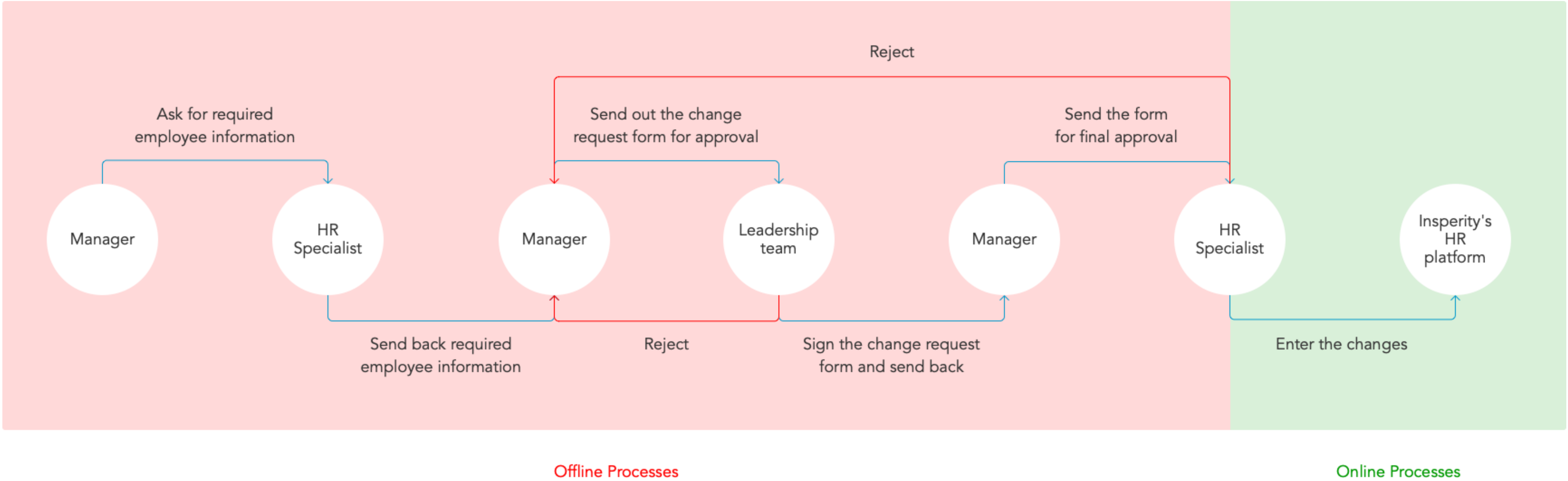
PAY RATE CHANGE / CLASSIFICATION - Enter changes only. Employee signature required for pay reduction and/or changes from nonexempt to exempt.

<input type="checkbox"/> Pay Rate Increase*	From:	<input type="checkbox"/> Hourly <input type="checkbox"/> Salary <input type="checkbox"/> Other	To:	<input type="checkbox"/> Hourly <input type="checkbox"/> Salary <input type="checkbox"/> Other	<input type="checkbox"/> This Employee supervises others. <input type="checkbox"/> This Employee no longer supervises others.
<input type="checkbox"/> Pay Reduction**	From:	<input type="checkbox"/> Hourly <input type="checkbox"/> Salary <input type="checkbox"/> Other	To:	<input type="checkbox"/> Hourly <input type="checkbox"/> Salary <input type="checkbox"/> Other	
Classification Change TO <input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> Seasonal			Is this Employee Temporary? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, Enter Temp End Date (mm/dd/yyyy)		
<input type="checkbox"/> Exemption Change	Is this employee exempt from overtime payment? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes", the FLSA Test for Exemption for this position should be completed, signed by the employee and on-site supervisor, and submitted to your Insperty payroll specialist.				
By signing below, I acknowledge that this is not a deferral of wages and I have not been promised that any reduction in wages reflected herein will be made up or paid at a later date. I also understand that a reduction in my wages will result in a reduction in benefit for any applicable life insurance, short-term/long-term disability, workers compensation and other benefit which is based on my wages/salary. **For a reduction in pay, this form must be signed and dated by the employee on or before the effective date of change.					
Employee Signature		Date Signed by Employee (mm/dd/yyyy)			*For a payroll contact and/or onsite supervisor pay increase or reduction, the client owner signature is required.
Payroll Contact/Onsite Supervisor Signature		Payroll Contact Printed Name		Date Signed (mm/dd/yyyy)	
Client Owner Signature		Client Owner Printed Name		Date Signed (mm/dd/yyyy)	

TO BE COMPLETED BY PAYROLL SERVICES

Entered By	Date Entered (mm/dd/yyyy)
------------	---------------------------

Original workflow



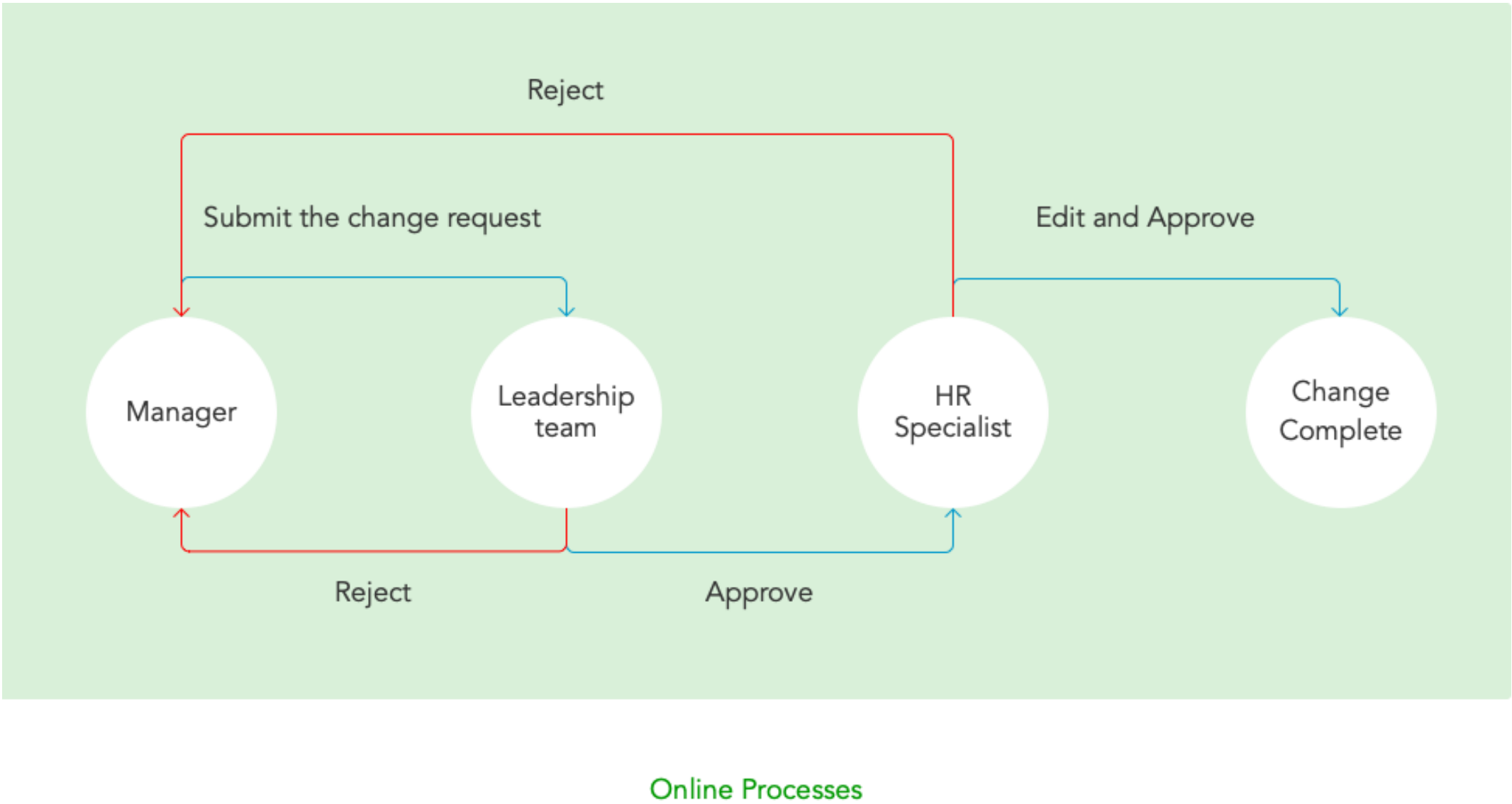
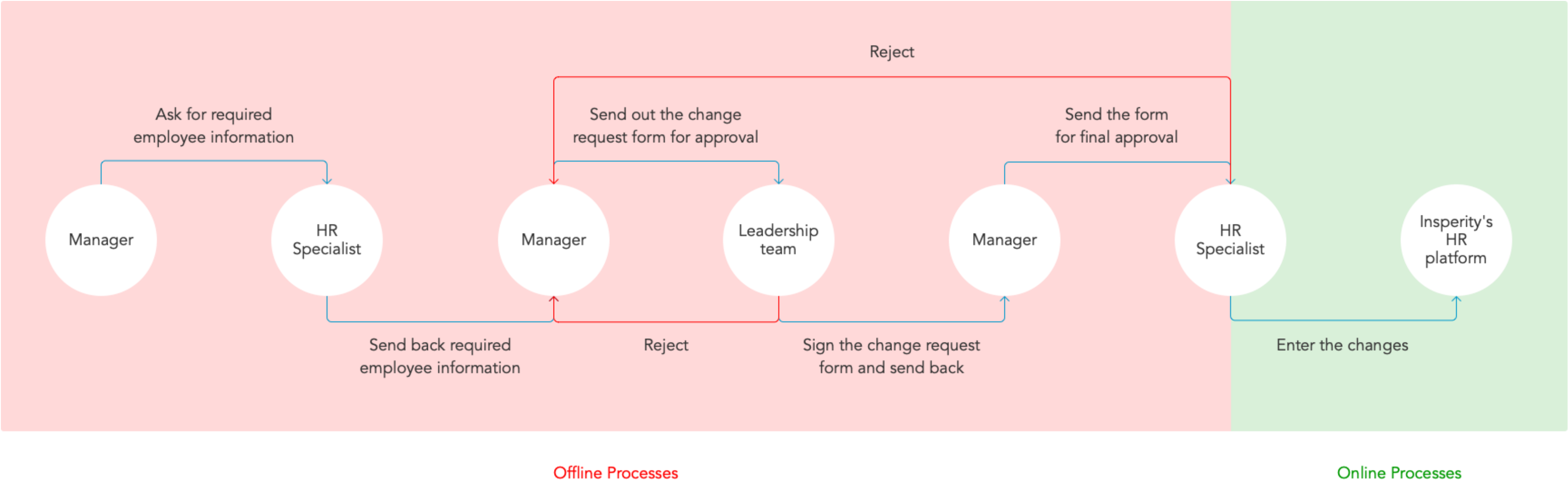
Metrics	Time spent on task
	Satisfaction score
	# of customer support tickets
	Active users/week

PEOPLE PROBLEM

ITERATION

OUTCOME

LEARNING



01

**Kick off a
change request**

by a manager

02

**Submit a
change request**

by a manager

03

Approve

by a HR

01
**Kick off a
change request**
by a manager

02
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Original dashboard

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ABDUL QADER	SIMMY	MARIA	CLUSTER SALES ASSOCIATE	1/1/2011	ANDRESON, VEE A	ADVANTAGE OPCO, LLC - MAINLAND	Active
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Iteration 1

Insperity

Search...

Jamie Pope

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Manage Employees

Currently Viewing: All

OverviewEmployeesHiringRecent Changes

My Tasks (2)

Verify I9 for Samantha GreenToday

Verify I9 for Nicole BarryTomorrow

Hiring

Status	No. of Employees
Employee Forms Complete	3
Employee Forms in Progress	4
Admin Primed	5
Draft	2

ADD EMPLOYEE

View All

Recently Viewed

Thomas McNeill

Brett Lewis

John Camp

Taylor Smith

VIEW ALL EMPLOYEES

Most Recent Changes

Changes	Employee	Status
Supervisor update	Brett Lewis	2/5 Change In Progress (?)
Termination	John Camp	3/5 Ready to Submit
Supervisor update	Jessie Camp	4/5 Processing
Check Delivery Address	Danielle Orna	5/5 Change Updated

VIEW ALL CHANGES

Iteration 1

Insperity

Search...

Jamie Pope

MY ACCOUNT

Paycheck

Benefits

401k

Time and Attendance

Training

Performance

COMPANY

Payroll

Manage Time

Manage Employees

Organizational Planning

Manage Performance

Reporting

Manage Company

Recruiting

Regulatory and Compliance

Forms and Policies

Home > Manage Employees

Manage Employees

Currently Viewing: All

Nav / Action

OverviewEmployeesHiringRecent Changes

My Tasks (2)

Tasks / Action

Recently Viewed

Employee / View

Hiring

Hiring / View

Most Recent Changes

Recent changes / View

Iteration 1

Insperity

Search...

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Employee / View

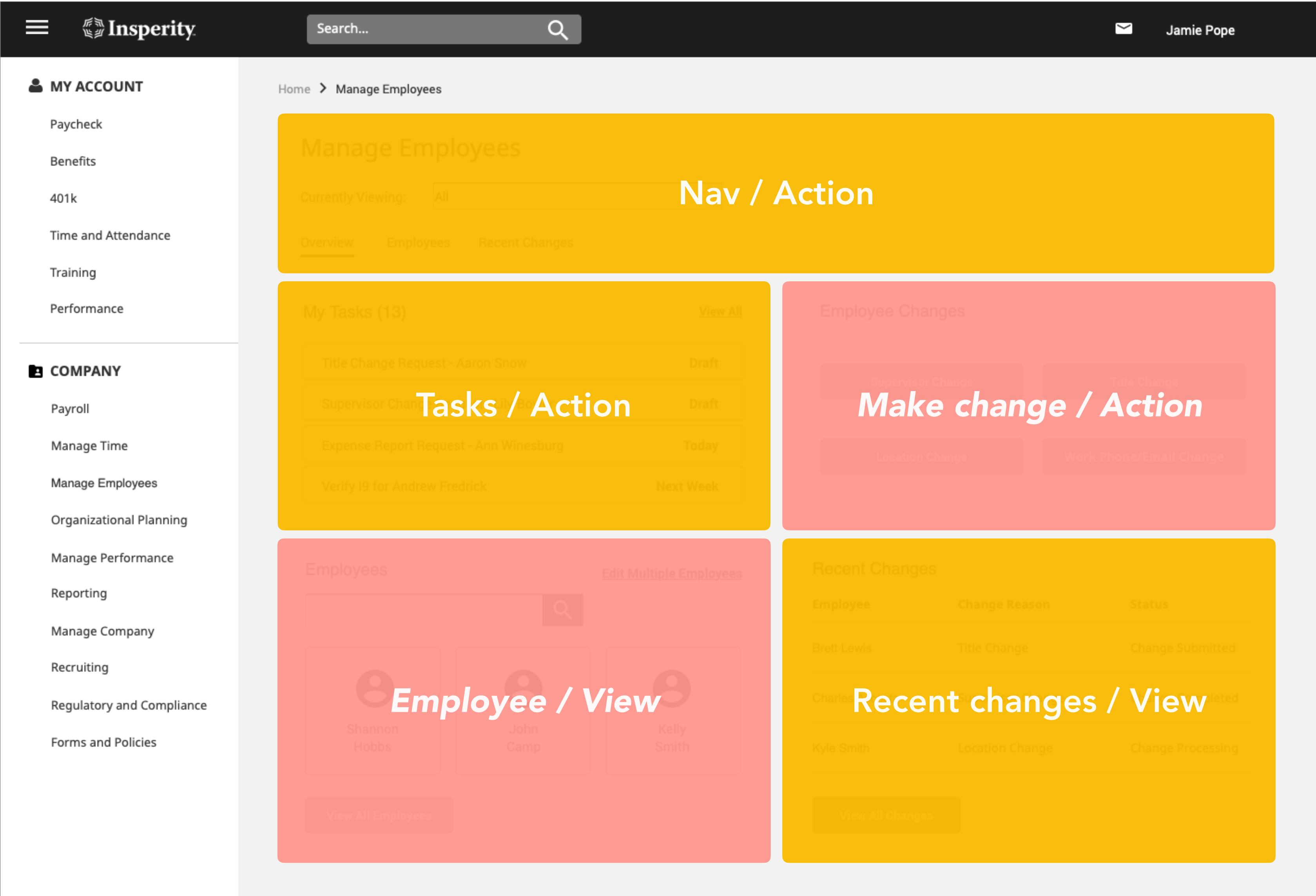
Hiring

Hiring / View

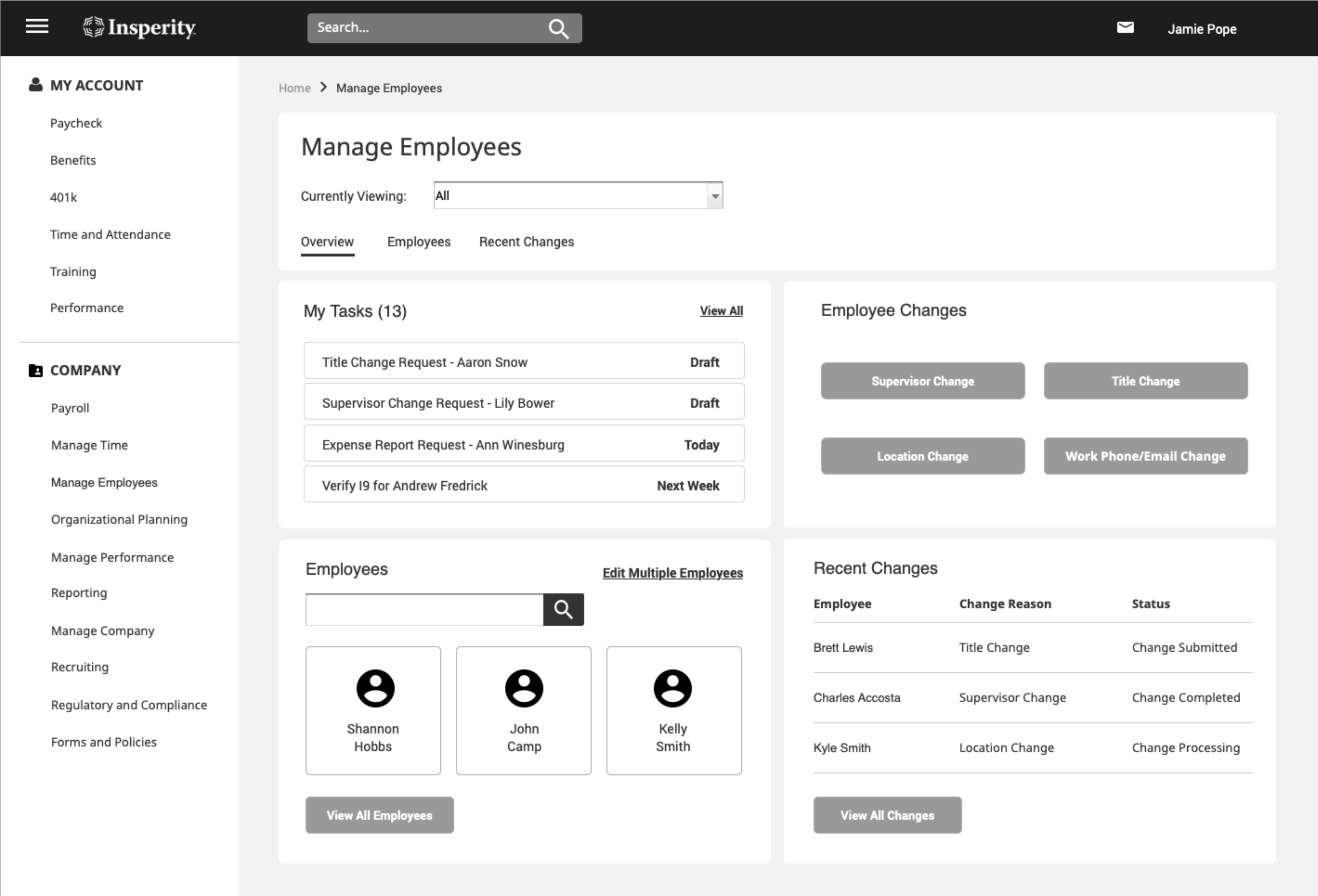
Most Recent Changes

Recent changes / View

Final wireframe



Final wireframe



STYLE GUIDE

Typography

Aa

Roboto

Regular · Medium · Bold

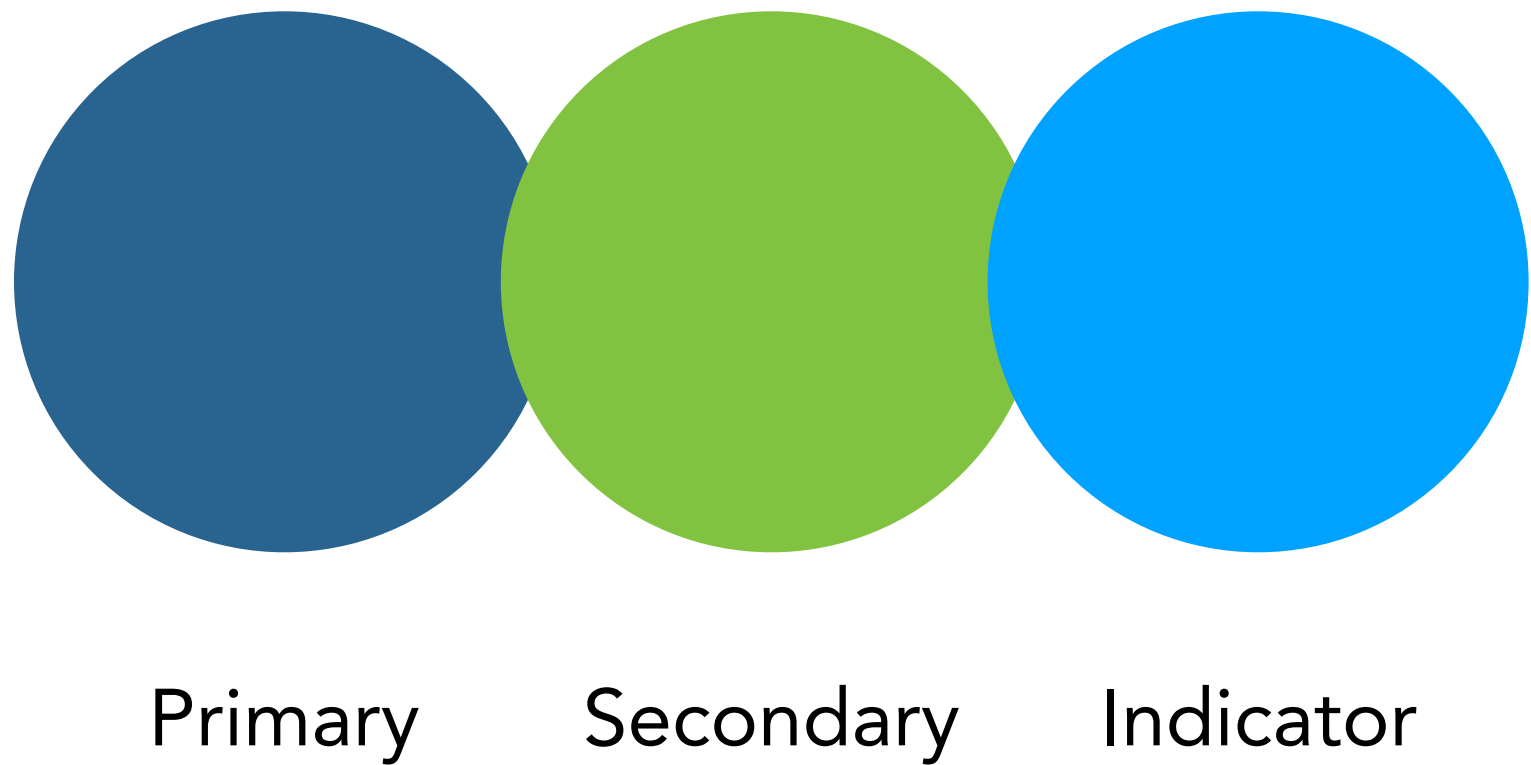
Heading 1

Heading 2

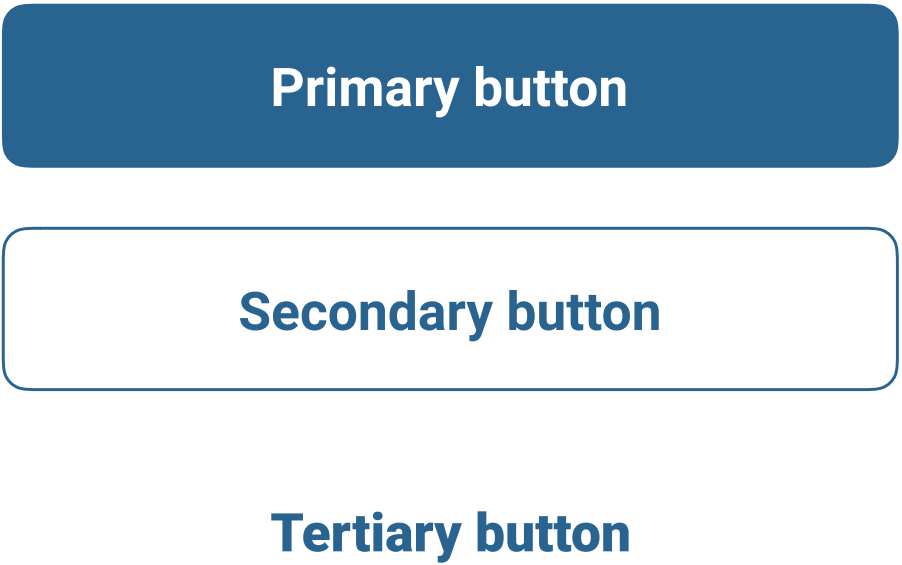
Heading 3

Paragraph

Color scheme



Buttons



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Overview

Employees

Recent Changes

My Tasks (13)

View All

Title Change Request - Aaron Snow

Draft

Supervisor Change Request - Lily Bower

Draft

Expense Report Request - Ann Winesburg

Today

Verify I9 for Andrew Fredrick

Next Week

Employees

Edit Multiple Employees

Shannon Hobbs

Director, People

Dallas, TX

John Camp

Director, Marketing

Stanford, CA

Kevin Golden

Senior Backend Devel...

Acron, OK

Monica Tyler

Account Executive

Dallas, TX

View All Employees

Employee Changes

Supervisor Change

Title Change

Location Change

Work Phone/Email Change

Recent Changes

Employee	Change Reason	Status
Brett Lewis	Title Change	Change Submitted
Charles Accosta	Supervisor Change	Change Completed
Kyle Smith	Location Change	Change Processing

View All Changes

25

01

Kick off a
change request

by a manager

02

Submit a
change request

by a manager

03

Approve

by a HR

Position Title: 		Department & Location: 		Project Code: 	
Type of Position: <input type="checkbox"/> New <input type="checkbox"/> Replacement		If Replacement, Name of Person Replacing: 		Posting: <input type="checkbox"/> Internal <input type="checkbox"/> External	
Number of Openings:					
Reports To (Name, Title): 		Position Category: <input type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt		Position Status: <input type="checkbox"/> Full-time <input type="checkbox"/> Part-Time <input type="checkbox"/> Regular <input type="checkbox"/> Temporary	
TDFPS Check Required? <input type="checkbox"/> Yes <input type="checkbox"/> No	Pay Rate/Range: <input type="checkbox"/> / hour or <input type="checkbox"/> / year		Work Hours/Days: 		Hours Per Week:
Required Qualifications (include <u>minimum</u> education, training, work experience, travel, skills, etc. <u>required</u> for this position):					
Preferred Qualifications (indicate the <u>preferred</u> education, training, work experience, skills, etc.):					
Description of the Position to be filled (describe the duties and responsibilities – <u>attach an approved job description for this position</u>):					
Additional Comments:					
PLEASE DIRECT RESUMES TO:					
Name:			Title:		
Email Address:			Phone Number:		
Signatures and Approvals:					
Program Manager: 			Date: 		
Director: 			Date: 		
Vice President: 			Date: 		
Received in Human Resources by: 			Date: 		

FINAL VISUAL

Title Change

✓ Employee and Effective Date

Employee Name

Shannon Hobbs

Effective Date

08/15/2019

Edit

Position

Job Title

Technical Assistant

Job Category

Professional

Job Function

General Labor

Job Code

423-533

Supervisor

Mike Fredrich

Supervises Others

☐ Yes

☒ No

Department

Technology

Department Code

111-233

Location

Texas

Location Code

344-644

Skip, No Changes

Save as Draft

Cancel

Attachments and Notes

Edit

Signatures and Approvals

Edit

Changes Summary

Edit

01

Kick off a
change request

by a manager

02

Submit a
change request

by a manager

03

Approve

by a HR

Iterations

Home > Manage Employees > Review Promotion Request - Shannon Hobbs

Changes Summary

APPROVE



ADD CHANGES

REJECT

Shannon Hobbs's Promotion going in effect 05/25/2019

What Changed	Original	Changed To
Position	Technical Assistant	Technical Specialist
Supervisor	Karen Bower	Jason White
Pay Rate	\$13.40 per hour	\$2,000.00 per hour

Signatures and Approvals

Position	Name	Date Approved	Signature
Supervisor	Karen Bower	04/25/2019	
Program Manager	Andrew Tannert	04/25/2019	

Home > Manage Employees > Review Promotion Request - Shannon Hobbs > Add Changes

Review Promotion Request - Shannon Hobbs

APPROVE

CANCEL

Employee and Effective Date

Employee Name

Shannon Hobbs

Change Reason

Promotion

Effective Date

05/25/2019

Position

What Changes	From	To
Job Title	Technical Assistant	Technical Specialist
Supervisor	Karen Bower	Jason White

SHOW WHAT'S UNCHANGES

Pay

What Changes	From	To
Pay Rate	\$13.40 per hour	\$20.00 per hour

SHOW WHAT'S UNCHANGES

Employment

No changes

SHOW WHAT'S UNCHANGES

Attachments

No attachment

+ Add Attachment

Signatures and Approvals

Select	Position	Name	Date Approved
<input checked="" type="checkbox"/>	Supervisor	Karen Bower	04/26/2019
<input checked="" type="checkbox"/>	Program Manager	Andrew Tannert	04/26/2019

+ Add A Signature for Approval

FINAL VISUAL

Change Summary

Approve

Edit

Reject

Employee and Effective Date

Employee Name	Change Reason	Effective Date
Shannon Hobbs	Supervisor Change	05/25/2019

Position

Job Title	Job Category	Job Function	Job Code
Technical Specialist	Professional	General Labor	11242-5342
<div><div>Supervisor</div><div>Jason White</div><div>Karen Bower (Original)</div></div>	<div>Supervises Others</div> <div>No</div>		
<div>Department</div> <div>Production</div>	<div>Department Code</div> <div>105</div>		
<div>Location</div> <div>Texas</div>	<div>Location Code</div> <div>105</div>		

Pay

Pay Type	Pay Rate	Annual Salary	Pay Period Amount	Hours
Hourly	\$2,000.00 per hour	\$57,600.00	\$2,400.00 Biweekly	80
Overtime	\$20.50 per hour	–	–	0

Employment

<div>Employment Status</div> <div>Hired</div>	
<div>Hire Date</div> <div>04/18/2016</div>	
<div>Position Status</div> <div>Full Time</div>	<div>Temporary Employment</div> <div>No</div>

No Attachment or Notes

Signatures and Approvals

Position	Name	Date Approved	Signature
Supervisor	Karen Bower	05/25/2019	
Program Manager	Andrew Tannert	05/25/2019	

PEOPLE PROBLEM ITERATION **OUTCOME** LEARNING

Results

~200,000 users

~20 mins Time spent on task

7.2 Satisfaction score

10% ↓ # of customer support tickets

55% Active users/week

PEOPLE PROBLEM ITERATION OUTCOME **LEARNING**

Offline process → Digital platform

01
**Use intuitive
design patterns**

02
**Mimic real life
structure**

03
**Roll out new
design in phases**