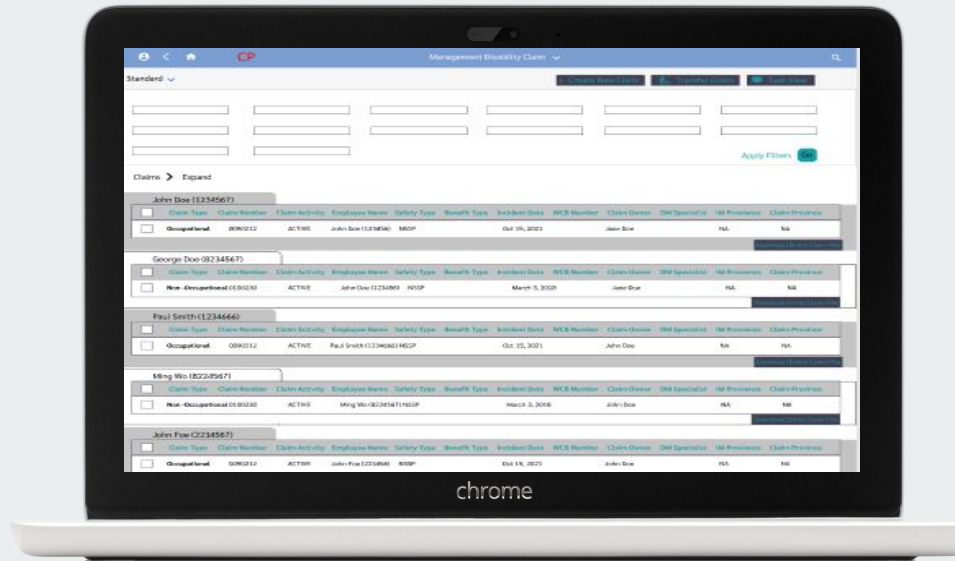


DM System Upgrade

Lisa Hanson



Project overview

The product:

The Disability Management (DM) Team is responsible for tracking leaves of absence and reviewing accommodation requests for employees at a Class I railway operation in the US and Canada. They are responsible for complying with relevant state, federal, and provincial laws. They work to facilitate safe and expedited return to work for all employees.

Project duration:

January 2022 - July 2022



The problem:

The existing DM case management system does not allow the specialists to easily and efficiently manage their caseload tasks or document non leave related concerns.

The goal:

Revamp the existing DM case management system to enhance its function to better capture the specialists daily work functions and allow for documentation of general concerns that are not associated with an active leave of absence.

**My role:**

UX Designer designing upgrades and new content to an existing web based DM system.

Responsibilities:

Conducting interviews, designing paper and digital wireframes, low and high fidelity prototyping, conducting usability studies, and iteration on design.



Understanding the user

- User research
- Personas
- Problem statements
- User journey maps



User research summary

I conducted user research and identified that users of the DM system were frustrated as they were not able to easily search through their cases to identify tasks that needed to be done on a day to day basis, and were not able to document notes in a case file unless it was tied to a current and active leave of absence. A few users also identified that the system was not able to capture their job tasks at all.

It was assumed that if the DM system were updated to enhance the functionality of the system to include tasks based on the users position, it would improve the productivity and efficiency of the team that used the DM system. System enhancements would also lead to improved legal compliance if all notes could be documented within the same system.



User research: pain points

- General notes - users reported that they weren't able to document all employee interactions in one system.
- Daily tasks - the current system does not make it easy to identify tasks that are due on a day to day basis.
- Limited function - users with specialty roles on the team noted that the system did not accurately capture the information they needed to document.
- Ease of use - system users reported that they were not able to easily find information that was needed for Job Search candidates.

Persona: Maxine Williams

Problem statement:

Maxine is a Disability Management Specialist who is passionate about accommodating employees with disabilities and needs to better document her case notes because her work needs to provide record of the companies compliance with Provincial guidelines and laws.

"I want to be able to easily document the work that I do with employees in one place so that I can better manage my caseload"

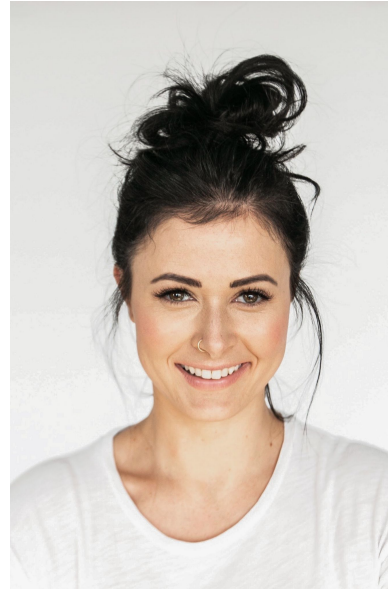
Maxine Williams

42 year old female

Masters degree in
Kinesiology

Lives with her partner
and 2 children in
Toronto, CA

Works as a Disability
Management Specialist





Persona: Maxine Williams

Goals:

- She wants to be able to document all notes in one employee file.
- To be able to quickly and efficiently review tasks that are to be done during her workday and work week.
- To use a system that makes it easy to get everything done by 15:30 so she can go home and enjoy time with her family.

Frustrations:

- "The drop down options in the FAF section of the system take too long complete"
- "I don't have a logical place to put Job Search information."
- "There has to be a better way to see and adjust my tasks for the week so I can plan better. I need a better work life balance."

User journey map: Maxine Williams

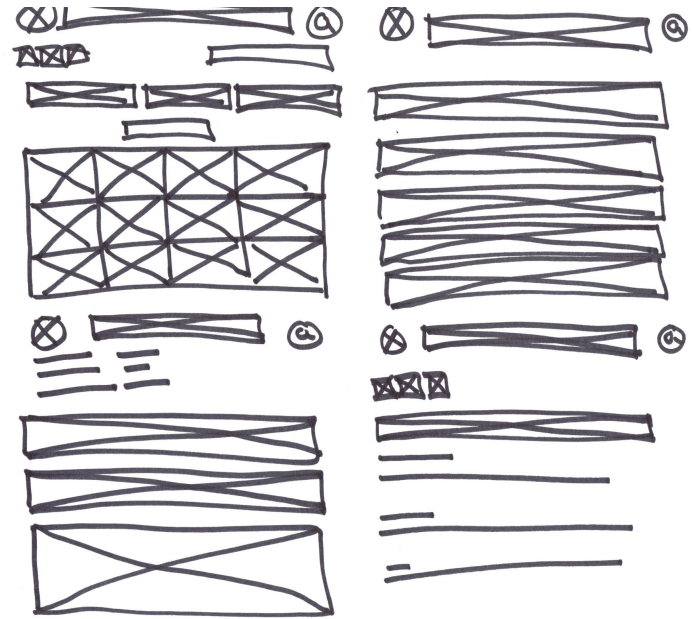
Phase of journey	Log into system	Search through employee cases	Document and save notes
Actions What does the customer do?	logs into work computer SSO allows access to DM system tile Select SAP Tile to DM system	Filters system by case manager Filters cases by employee name Reviews all employee cases Selects the appropriate case to review Searches through notes and attachments to find necessary info	After reviewing file documents notes Has to scroll to top of screen and save If not saved properly have to go back and redo work
Customer Thought	SSO access makes process easy No issues logging on No timeout feature is a benefit	Cases listed in order opened - not by alphabetical order Cases named by date case opened - not ideal Need to go into separate system if case opened improperly - frustrating extra work Need to scroll a lot for cases where employees have been off or long periods - too much work Can only see tasks due in a separate tab as past due, future due and completed - not by date	There is no automatic save. No prompt to remind if forgotten There is no way to edit the case notes section if an error is made There is no way to categorize the case notes
Customer Feeling			
Opportunities	System access seen as easy	Need a better way to label the cases - or allow specialist to self label Need to be able to identify tasks by due date Need to make employee information clearer Need to make data entry for FAF quicker Need to create general case information that is easy to access	could provide reminder to save can have additional save button in relevant areas Identify a way to edit notes if appropriate

Updating the design

- Paper wireframes
- Digital wireframes
- Usability studies
- High-fidelity prototype

Paper wireframes

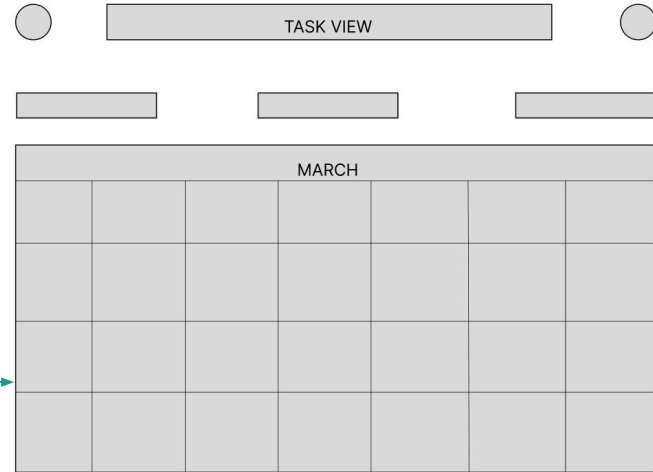
Starting the iteration process with paper wireframes allowed for an efficient way to brainstorm and identify ways to update the existing case management system to address the current users pain points.



Digital wireframes

As upgrades were being made to an existing system, digital wireframes were created for new web page content to better address the users primary concerns and pain points.

Visual calendar representation with tasks represented on the calendar due date.





Usability study: findings

Round 1

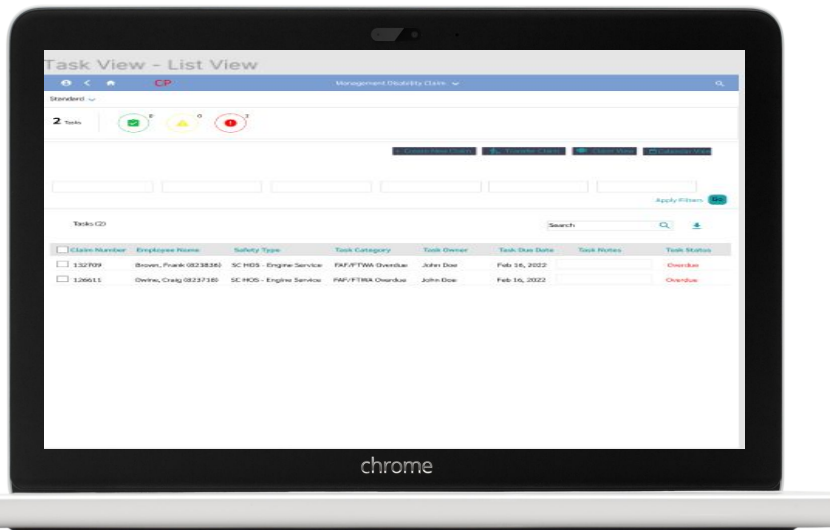
- Users were frustrated with the lack of ability to document notes for inactive cases.
- 4 out of 5 users did not find the task list useful in managing their daily tasks.
- 5 out of 5 users indicated that it took too long to use the drop down menu for the FAF tab.

Round 2

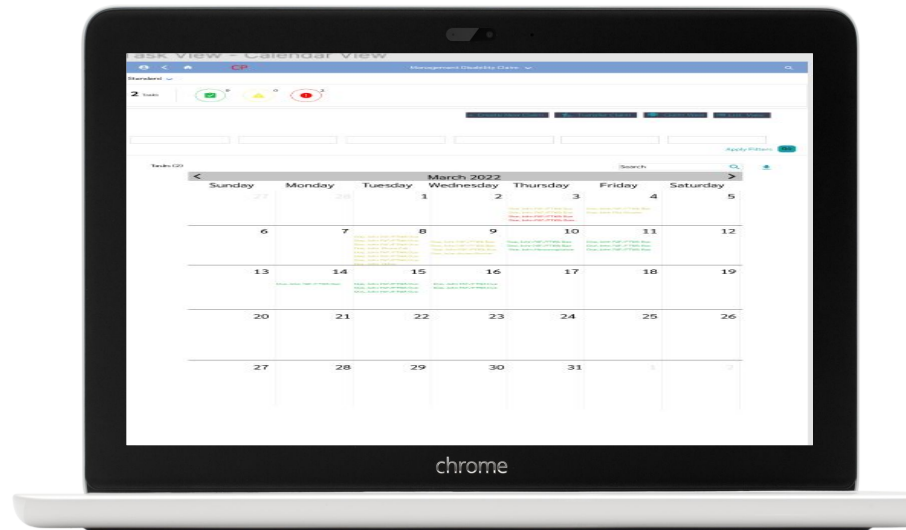
- All 5 users were happy with the task list presented in a calendar view format.
- The added transferable skills section was reported as valuable - however users wanted to be able to access this information in any file.
- Adjustments to the FAF form reduced time spent on data entry on this tab by 40%+.

Mockups

Before usability study, task - list view

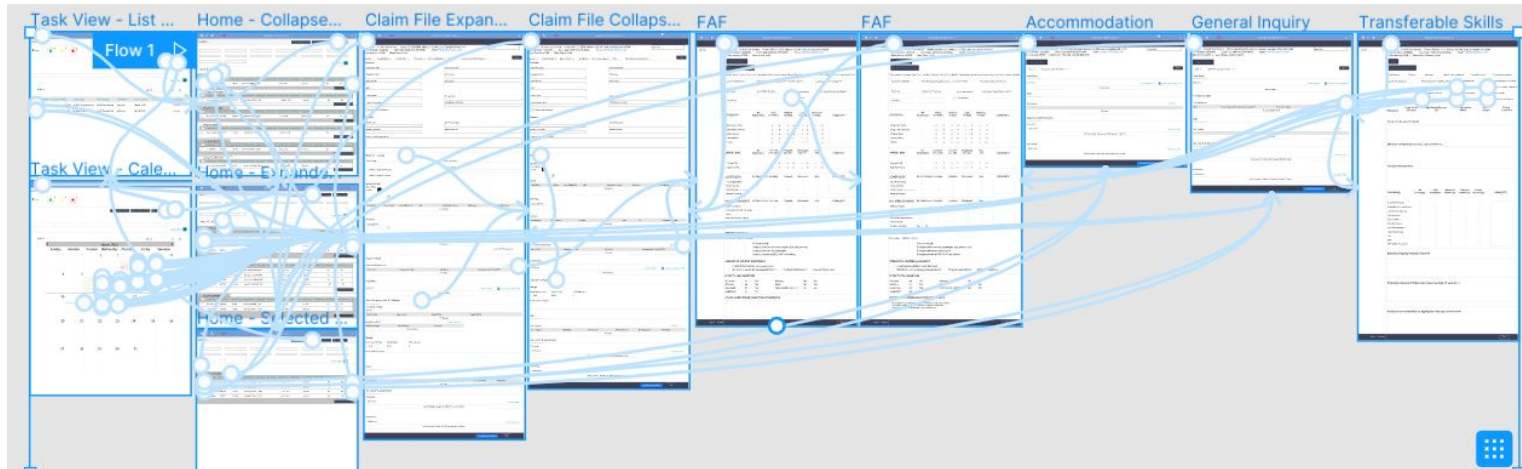


After usability study, task - calendar view



High fidelity prototype High fidelity prototype

The high-fidelity prototype presented a cleaner user flow with a better functional work experience. Existing work tabs were enhanced based on feedback gleaned in usability studies.





Going forward

- Takeaways
- Next steps



Impact:

The DM System upgrades should enhance the functionality of the work done by the DM Specialists.

"Ohhhhh i love that! I can gauge my whole week with the calendar view so that I schedule things with a better view of all my weekly tasks."

"I love the transferable skills section, but I want to be able to access this information in any of the employee files."

What I learned:

The iterative design process is best approached when reviewed by the actual users of the system with a variety in job roles. Based on the different roles that the DM Specialists held, there are some roles where simple system enhancements will make a big difference in how they are able to work. Other users, still require a complete overhaul or additional offerings in the system to be able to enhance their work experience.



Next steps

- Undergo additional user interviews for the positions where the current system is failing. Get an understanding of what data they need to capture that they currently can't in the existing system. Design and iterate additional features or changes to the system for these specialty users.
- Conduct another usability study to ensure that the features for the specialty users enhance the ease of documentation for their job needs and allow for easy navigation within the new page offerings.
- Handoff system design changes to the development team to begin production.

Questions?

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