




2023 DMEC ANNUAL CONFERENCE
AUGUST 14-17, 2023 • SAN DIEGO, CA

Successes & Pitfalls of Self-Service Tools


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August 14, 2023




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Panelists




Christy Traupe, SVP Claims & Absence




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Objectives

- Learn about self-service use and benefits
- Learn how use of self-service tools improves engagement
- Things to share and what to avoid when using self-service
- Tips for avoiding information overload
- Learn the importance of well-placed human interaction



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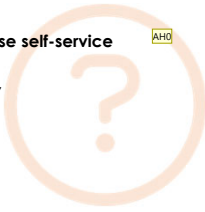



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Polling Question

Does your organization currently use self-service tools for your benefit programs? AHQ

For example: benefit portals, apps, or intranet sites.





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Meet Jennifer

Keep Jennifer in mind as we talk about self-service and see how her journey is impacted by the various methods her HR team uses to assist her during her illness and recovery.



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The Self-Service Toolkit




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Slide 4

AH0 They will not have an electronic poll - this will be a raised-hands engagement with audience

Audrey HonigGeragosian, 2023-06-06T18:27:25.111

Slide 5

JF0 Marketing, can we create a roadmap journey of someone? We'd like to show the roadmap and the stops along the journey as we incorporate what's happening to Jennifer and how self-service improves the process.

Joanna Floyd, 2023-06-05T18:34:00.502

AH1 The text is the story they will tell throughout the deck - Jennifer's Journey - that they are hoping you will illustrate for them. Will require multiple images, career > travel > hospitalization. You can delete the text - it's here to tell you the story.

Audrey HonigGeragosian, 2023-06-06T18:29:56.004

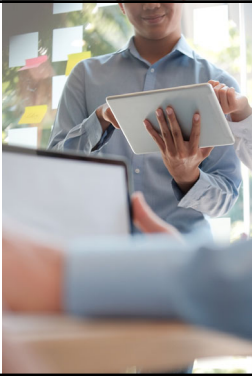

Slide 6

JF0 Marketing, can we add some graphics for a toolkit or toolbox? Can we animate it?

Joanna Floyd, 2023-06-05T14:42:56.093





What is self-service?

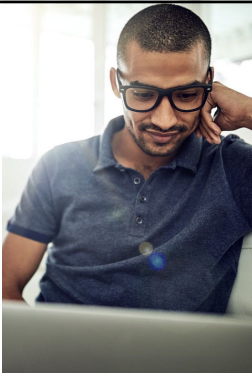

- A digital extension of a product or service
- Offers employees access to information and resources
- Can help answer common questions
- Request a service
- Address and resolve common issues

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Self-Service Tools

-  Benefit Apps
-  Company Intranet Sites
-  Absence and Disability Portals
-  Just-in-time communications





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Absence & Disability Portals

Employee Portal 

- To request a leave
- To check on a status of a leave
- Obtain copies of documents or upload documents
- Check available time

Employer Portal 

- Check on employee's leave status
- Assist in work coverage planning by seeing who is on leave and for how long
- Review and plan for upcoming return to work



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Slide 7

AHO This is a generic photo they grabbed. Something better would be great.

Audrey HonigGeragosian, 2023-06-06T18:31:09.082

Slide 8

AHO They would like the bubbles to come in one at a time. Pls replace cartoon with a photo. Can be a man, not to be confused with Jennifer.

Audrey HonigGeragosian, 2023-06-06T18:32:15.846


Payment Info View Letters & Forms

Upload Documents **PORTAL CONTENT** Report Intermittent Time Device Agnostic

Culture & Brand 24/7 Availability Confirm RTW

Initiate a Leave Intuitive Navigation

View Case Status Chat with Customer Service



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Just-in-Time Communications




 <p>SMS/Comms</p> <p>Upcoming appointments Paperwork Reminders Decision Statuses</p>	 <p>Educational Materials</p> <p>May is Mental Health Month New Parent Support Programs Company-sponsored Groups</p>	 <p>Benefit Enrollment</p> <p>Reminder of the great programs the organization offers</p>	 <p>Qualifying Event</p> <p>Welcoming of a new baby, death of family member, new job or loss of job or benefits</p>
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Jennifer's Journey: The Portal

Francine sends the link and instructions to Jennifer, hoping that this will enable more effective communication and ability to engage Jennifer more effectively in the leave process.

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Slide 12

JF0 For Marketing, can we represent this story with a picture/graphic or visual representation while the panelists talk about the story (i.e. picture of her texting or using technology to request a leave.



Joanna Floyd, 2023-06-05T15:00:20.584

AH1 Again - the text does not need to be here, just images that continue the story.

Audrey HonigGeragosian, 2023-06-06T18:39:28.479

Benefits of Self-Service

- Empowering employees
- 24/7 availability
- Reduction in calls to and from HR
- Real-time access to information
- Increased efficiency & productivity
- Removal of repetitive tasks
- Improve communication

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Increasing Self-Service Engagement

- Simplify the registration and access process
- Improve user experience
- Educate the user about the benefits of self-service
- Add QR codes or site links in employee communications to direct them to the right place
- Allow for personalization
- Solicit feedback and act on it
- Provide training through pre-recorded videos, FAQs and How-Tos
- Make information easily accessible and visible
- Advertise the portal



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Effective Self-Service Design


- Streamlined navigation
- Keeps content organized
- Consistent look and feel
- Uses quality content
- Keeps it simple
- Clear and descriptive labels
- Helpful tips




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Things to Avoid


- Displaying incorrect information
- Displaying too much information
- Change personal details – those should be reserved for the source system of record
- Difficult navigation on the site (not intuitive)
- Poor color scheme
- Too many clicks or links
- Use of industry jargon
- Visibility of PHI and PII information to the wrong user



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Information Overload



- Don't put everything about your benefits in one place
 - Use easy access links
 - Meet employees where they are
- Keep the look and feel simple
- Use common terms and language, not industry jargon




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Jennifer's Journey: HR Contact

Despite all that Jennifer has been through, she's grateful for Francine's assistance and follow up during the claim process.

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Slide 18

AHO Illustrate the text, then remove it


Audrey HonigGeragosian, 2023-06-06T18:44:54.004

When the Human Touch Matters

- Self-service and automation cannot replace human contact!
- Portals and websites allow employees to streamline some functions and make access to information easier
- HR can focus on building relationships with employees






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Wrap-Up

- You don't have to build your own portal
- Leverage other vendors if necessary





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