



Client-Facing CX Layout Optimization Guide

CX Optimization Review for Layout Manager

Document Summary

CSLs, share this document with clients who complete their own optimization review and/or maintenance for member-facing layouts in Benefitsolver.

Primary Audience

Clients

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For guidelines and tips for writing SOPs, see [How to Write an SOP at Businessolver](#)

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- Updated field that links to version history at end of document, updated Task List to include Heading 4



Contents

Overview of CX Layout Optimization.....	3
Important Best Practices	3
Tasks for Member Home Layout Optimization	4
<input type="checkbox"/> Enable “Layout Manager Submenu” Functionality	4
<input type="checkbox"/> Create Optimized Member Home Layout from System Template.....	4
<input type="checkbox"/> Create Copy of Existing Member Home Layout to Optimize	6
<input type="checkbox"/> Organize Home Page Navigation (Submenus and Microsites for “Mega Menu”).....	7
<input type="checkbox"/> Review “Help Link” Setting.....	10
<input type="checkbox"/> Add Sofia Widget and Video to Member Home Page.....	11
<input type="checkbox"/> Add Enrollment Banner Widget	13
<input type="checkbox"/> Review/Add Service Widgets	13
<input type="checkbox"/> Review/Add MCA Balance Widget (if applicable)	14
<input type="checkbox"/> Review/Add Point Solution Widgets (if applicable)	16
Tasks for Member Mobile Layout Optimization.....	17
<input type="checkbox"/> Create New Member Mobile Layout.....	17
<input type="checkbox"/> Review Home Page Navigation	18
<input type="checkbox"/> Review and Update Page Content	20
<input type="checkbox"/> Review Sofia Content.....	23
Tasks for Sign On Layout Optimization	24
<input type="checkbox"/> Create New Sign On Layout	24
Visual Guide of Widgets Used in Optimized Member Home Layout	28
<input type="checkbox"/> Enrollment Banner Widget.....	31
<input type="checkbox"/> Home Page Navigation	31
<input type="checkbox"/> Text Widget.....	31
<input type="checkbox"/> Layout Containers	31
<input type="checkbox"/> To Dos Widget	31
<input type="checkbox"/> Mobile App Widget.....	31
<input type="checkbox"/> Welcome Widget	32
<input type="checkbox"/> Tabs Widget.....	32
<input type="checkbox"/> Reference Center Widget	32
<input type="checkbox"/> Promo Widget	32
<input type="checkbox"/> Point Solution Widget	32
<input type="checkbox"/> Service Widget.....	32
<input type="checkbox"/> Sofia Widget	32
Appendix A: Checklist for Member Home Page Navigation Optimization.....	33





Overview of CX Layout Optimization

Businesssolver's Consumer Experience (CX) team uses data analysis, user testing, and industry standards to identify and develop best practices to configure Benefitsolver for the best member experience. Although highly configurable, there are certain configuration combinations in Layout Manager that lead to better outcomes for members, especially for the Member Home layout.

Leverage the optimization guidelines in this document to increase member delight and improve knowledge and engagement with their benefits. It's highly recommended to use the system-level optimized layout templates:

- **Optimized Member Home**
- **Optimized Mobile Layout**
- **Optimized Sign On**

Company - Layout Manager

Add a Layout

Layout Name:

Layout Type:

Copy From:

Language:

Divisions:

Important Best Practices

As you get ready to optimize your layouts, there are a few crucial things to keep in mind:

- **Save often.** As you work on a layout, be sure to click "Save" frequently to save changes, especially when organizing microsites and submenus.
- **Don't delete microsites – hide them.** Never delete a microsite! Deletions may break member-facing deep links. Additionally, by hiding a microsite instead of deleting it, it will still be available to use as a template or reinstate in the future if you add the benefit.
- **Plan and map out microsites and content before you begin.** See [Appendix A: Checklist for Member Home Page Navigation Optimization](#) at the end of this document for a helpful checklist tool to assist with this.





Tasks for Member Home Layout Optimization

Not all of the following tasks may apply to your specific situation.

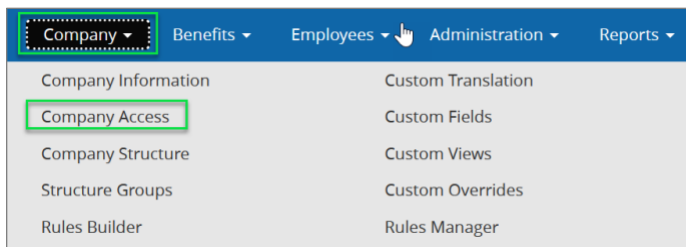
Enable "Layout Manager Submenu" Functionality

The optimized Member Home layout has a standard navigation structure that organizes microsites for members (aka the "Mega Menu"). To use this approach, the Layout Manager Submenu functionality must be enabled in Company Access.

Note

Enabling the Layout Manager Submenu functionality won't update how microsites are organized on existing layouts. It does allow you to use the functionality going forward if you would like to manually update existing layouts, but existing layouts won't be automatically updated.

1. Navigate to **Company > Company Access**.



2. Select the checkbox for **Layout Manager Submenu** (if not already selected).

Historical Data Viewing	<input checked="" type="checkbox"/>	Select Structures	Start Date:	<input type="text"/>	
Layout Manager Submenu	<input checked="" type="checkbox"/>		Start Date:	05/24/2023	
Member Documents	<input checked="" type="checkbox"/>	Select Divisions	Start Date:	<input type="text"/>	

3. Enter today's date in the **Start Date** field. This step is crucial to ensure the functionality works correctly.

Historical Data Viewing	<input checked="" type="checkbox"/>	Select Structures	Start Date:	<input type="text"/>	
Layout Manager Submenu	<input checked="" type="checkbox"/>		Start Date:	05/24/2023	
Member Documents	<input checked="" type="checkbox"/>	Select Divisions	Start Date:	<input type="text"/>	

4. Click **Save** at the bottom of the page.

Running Totals	<input checked="" type="checkbox"/>
Shared Election Pages	<input checked="" type="checkbox"/>
Save	Cancel

Create Optimized Member Home Layout from System Template

Whether you decide to build a brand new Member Home template or are updating an existing Member Home layout, create a layout from the "Optimized Member Home Layout" template to help implement CX standards.

1. Navigate to **Company > Layout Manager > Member Home**.





2. In the **Add a Layout** section, complete the fields.

- Layout Name:** Enter "[company name] Optimized Member Home Layout." If you are updating an existing Member Home layout, consider adding "FOR REFERENCE ONLY" to the title to remind yourself to delete it once updates are complete.
- Layout Type:** Select "Member - Home."
- Copy From:** Select "Optimized Member Home."
- Language:** Leave as default "english."
- Divisions:** Leave as "All," unless layout should only apply to certain Divisions.

3. Click **Add New Layout**.





Create Copy of Existing Member Home Layout to Optimize

If it is easier to update your existing Member Home layout to follow CX standards than it is to create a whole new layout from the system template, create a copy of the existing layout. Make edits to this copy and do not enable it for members to see until it is fully optimized and approved. To create a copy of the existing layout:

1. Navigate to **Company > Layout Manager > Member Home**.



2. In the **Add a Layout** section, complete the fields.
 - a. **Layout Name:** Enter the name of the existing layout and add "Optimized."
 - b. **Layout Type:** Select "Member - Home."
 - c. **Copy From:** Select the title of the existing Member Home layout.
 - d. **Language:** Leave as default "english."
 - e. **Divisions:** Assign to the same Divisions as the existing Member Home layout.

Add a Layout

Layout Name

2023 Optimized Cutting Edge Member Home

Layout Type

Member - Home

Copy From

Cutting Edge Member Home

Language

english

Divisions

All x

Add New Layout

Import Layout

3. Click **Add New Layout**.

Divisions

All x

Add New Layout

Import Layout





Organize Home Page Navigation (Submenus and Microsites for “Mega Menu”)

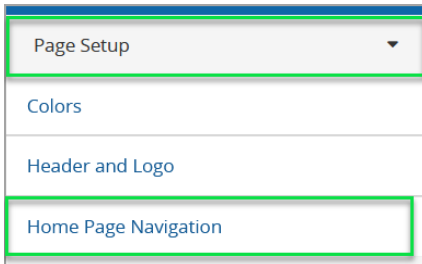
Add and Organize New Submenus and Microsites (When Updating Existing Layout)

When updating an existing Member Home layout, new submenus and microsites must be added and organized to follow the CX standards used in the system template, "Optimized Member Home Layout."

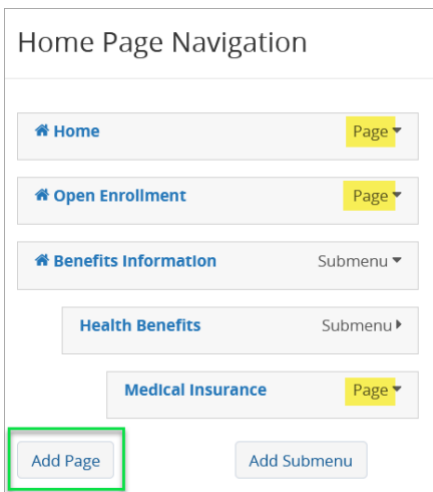
NOTE

Be sure to click "Save" frequently to save changes. This will close the "Home Page Navigation" window. Open it again and continue working after each save.

1. In your copy of the existing Member Home layout, on the left side of the layout editing page, click **Page Setup > Home Page Navigation**.

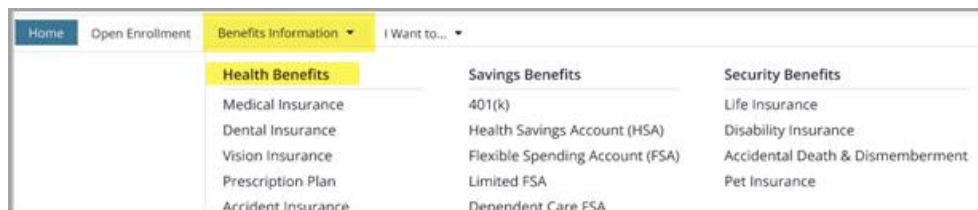
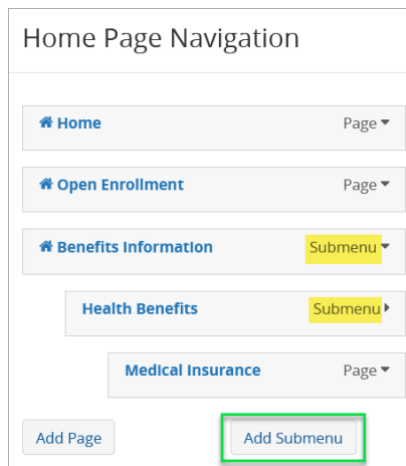


2. In the Home Page Navigation window, click **Add Page** to add a new microsite. There should be a page/microsite for each benefit the client offers their employees.

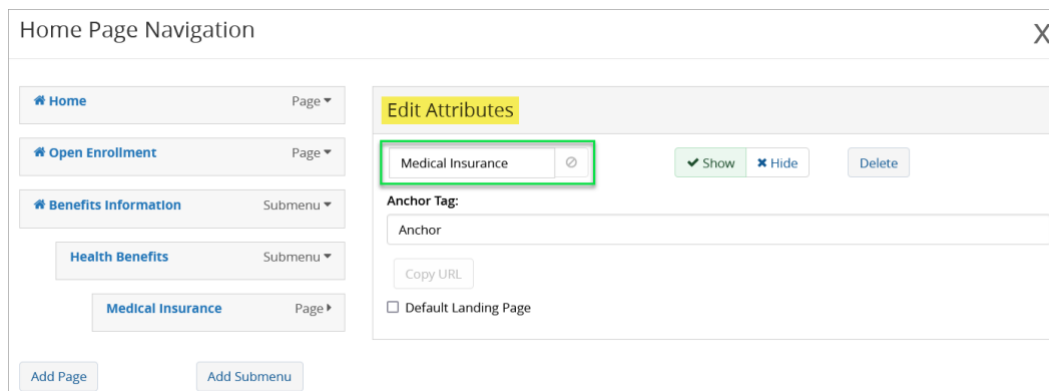




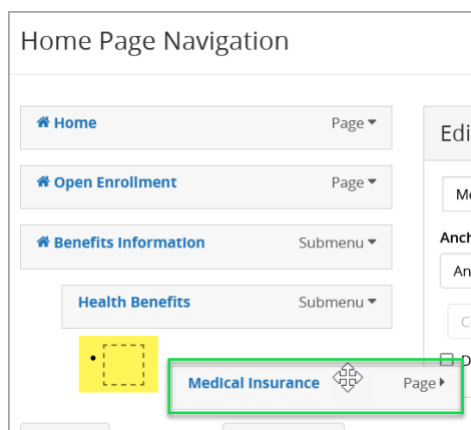
- Click **Add Submenu** to add a new submenu. Two levels of submenus may be created to organize the member-facing "Mega Menu." For example, the "Health Benefits" submenu falls under the "Benefits Information" submenu to create a cascading menu for members.



- After a page or submenu is added, title it in the **Edit Attributes** section.



- To reorganize submenus and pages, **click and drag**. A box will appear at each level to indicate where you can drop it.





- Click **Save** in the "Home Page Navigation" window to save changes.

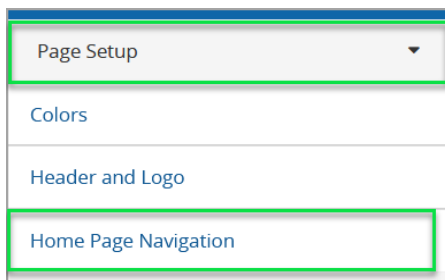
Hide Unnecessary Microsites (When Creating New Layout from Template)

When creating a new Member Home layout from the system template ("Optimized Member Home Layout"), not all microsites/pages may apply. For example, the template includes microsites for Tuition Reimbursement and Adoption Assistance, but not all companies offer these benefits. To adjust the Member Home layout to only show info for your company's benefits, you must hide unused microsites (**do NOT delete them!**).

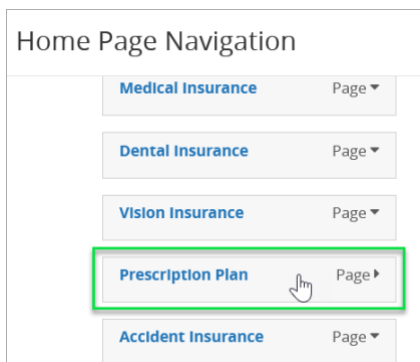
WARNING!!

Never delete a microsite! Deletions may break deep links, creating a confusing experience for members. Additionally, by hiding a microsite instead of deleting it, it will still be available to use as a template or reinstate in the future.

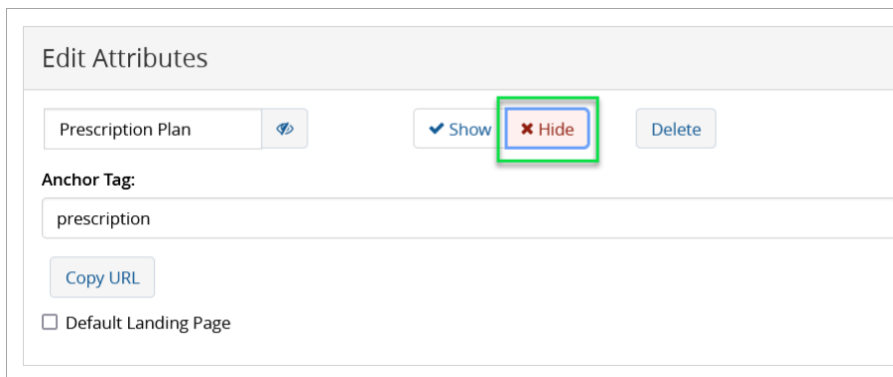
- In the new layout created from the system template, on the left side of the layout editing page, click **Page Setup > Home Page Navigation**.



- Click on the page that members shouldn't see.



- In the Edit Attributes section, click **X Hide**. When selected, it will display with red shading.



- Click **Save** in the "Home Page Navigation" window to save changes.





Review “Help Link” Setting

When editing the Member Home layout, there is an option to enable the "Help Link" for members. This setting should ONLY be enabled if you do NOT use Sofia. So, most Businessolver clients should have it disabled.

Note

If you or your client does not use Sofia, and the Help Link is enabled, make sure that the **“Support”** fields under Company > Company Information > Company tab are populated, and **Support Admins** are assigned. Assigned admins will receive messages that members send via the Help Link.

Company Security Contacts Notes Archived Notes Status

Company Name: Cutting Edge Technology - DEMO *

Client Directed Team: Sales/Demo

Federal Tax ID: 99-9999999 *

Website URL: www.benefitsolver.com/benefits

Support Phone: 18008889999

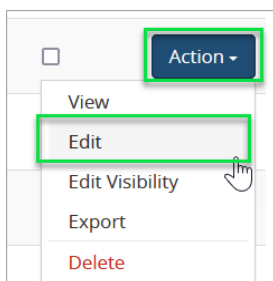
Support Text: The support line is available 8:00 a.m. to 5:00 p.m. (150 characters or less)

Support Admins: Select Admins

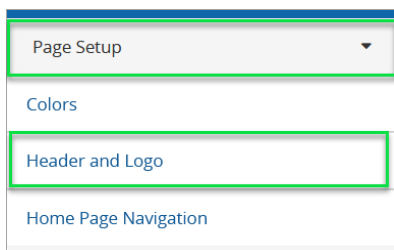
1. Navigate to **Company > Layout Manager > Member Home**.



2. Locate the Member Home Layout and select **Action > Edit**.



3. On the left side of the layout editing page, click **Page Setup > Header and Logo**.



4. Review the **Help Link checkbox**. If it is selected and you use Sofia, click to clear the checkbox.





5. Click **Save** in the "Header & Logo" window.

Add Sofia Widget and Video to Member Home Page

Sofia Widget

1. If Sofia is enabled for employees, make sure the **Sofia widget** is included as a resource on each microsite and higher on the page than Service Center contact information. This widget puts Sofia front-and-center, and members can type a question to open Sofia's chat window.

Note

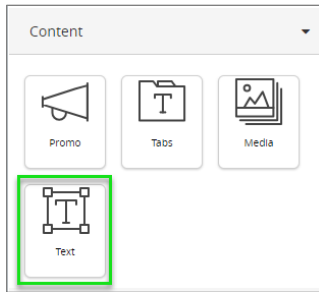
On the main Member Home landing page, the best practice is to position the Sofia widget below the To Do widget and above the Welcome widget.

2. If you also want to provide the Service Center phone number on the Member Home layout, add another **Text widget** with Service Center info.

Note

Make sure the Sofia widget is situated higher on each page than the Service Center Text widget.





Create Text Widget

Title

Questions?

Text

Paragraph

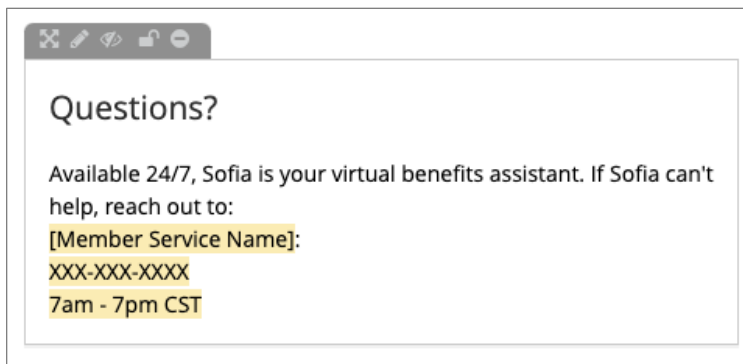
B *I* U

Insert Text 16px

Available 24/7, Sofia is your virtual benefits assistant. If Sofia can't help, reach out to:
[Member Service Name]:
XXX-XXX-XXXX
7am - 7pm CST

Cancel

Save

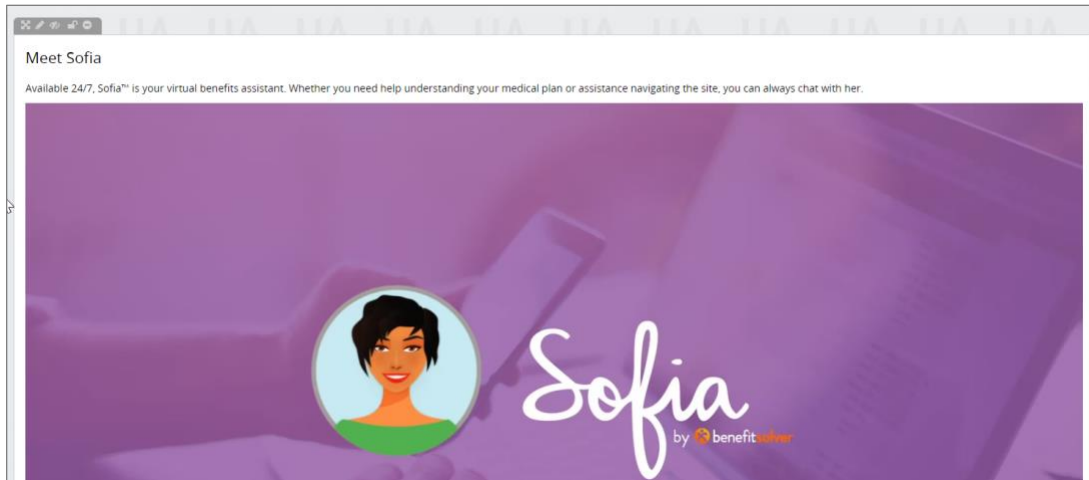


- Confirm that the **Sofia widget** is included as a resource throughout all microsites. It should be placed in the 1/3rd column on the right side for all microsites but the home page.

Sofia Video

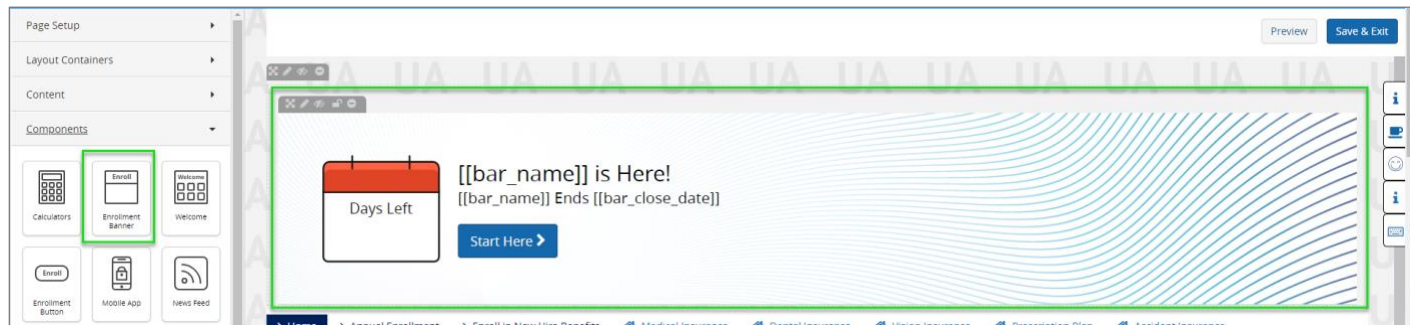
Confirm that the Sofia promotional video is present on the Homepage. Video link:
<https://player.vimeo.com/video/454522952>





Add Enrollment Banner Widget

If it is not already present, add the **Enrollment Banner** widget to the top of the Member Home layout.



Review/Add Service Widgets

Whether you are building a brand new Member Home template or updating an existing Member Home layout, make sure that Service Widgets for vendor SSO (for EOI) and Direct Bill/COBRA bill pay are set up and functioning correctly.

If you are building a brand new Member Home template, the following widgets must be added to the layout. If you are updating an existing Member Home template, the widgets should already be set up, but it's important to test the member experience. In either scenario, **work with your CSL/Client Services team to implement and test the widgets.**

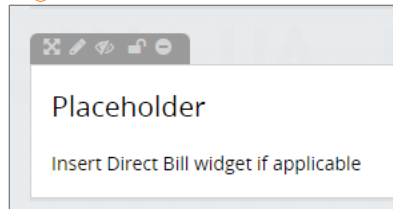
Note

Setting up and testing these widgets may require assistance from your Client Services team. Review early with plenty of time before the layout goes live.

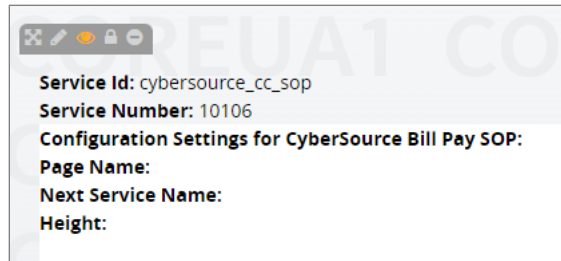
Direct Bill and COBRA Payment (if applicable)

The Cybersource Service Widget allows members on Direct Bill and COBRA to make payments on the Mobile layout. Bill pay prompts in the MyChoice Mobile App will direct members to this widget on the Mobile experience.





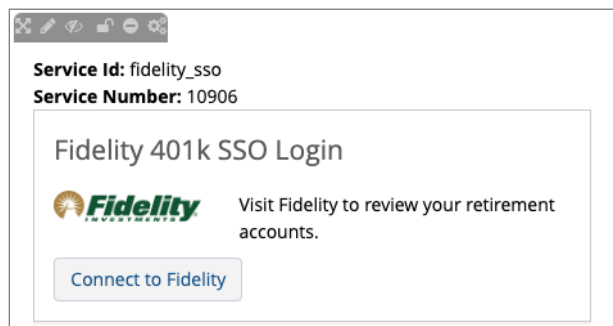
Example of a completed payment widget:



Vendor SSO Widgets (for EOI)

Service Widgets set up for vendor EOI allow members to SSO (Single Sign-On) to the vendor's site and submit EOI after they have completed an enrollment transaction.

Example of a completed SSO widget:



Review/Add MCA Balance Widget (if applicable)

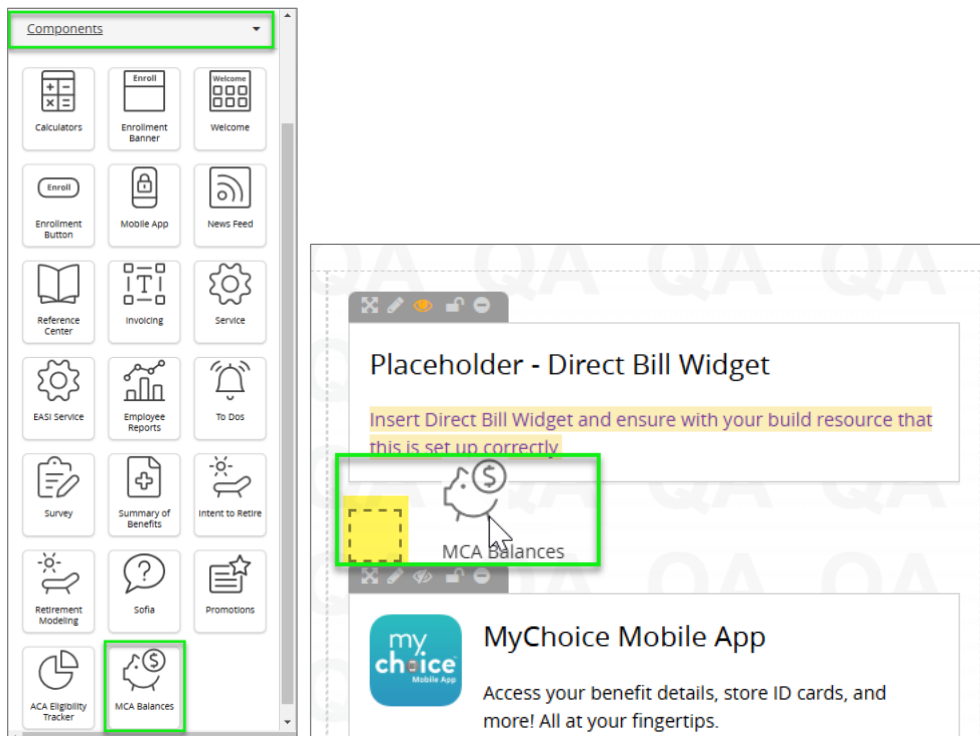
If you contract for MyChoice Accounts (MCA), be sure to include the **MCA Balance Widget** on the Member Home page and any applicable consumer account microsites. The widget shows members balances for their accounts and provides a link to the MCA web experience.

Member Home Landing Page

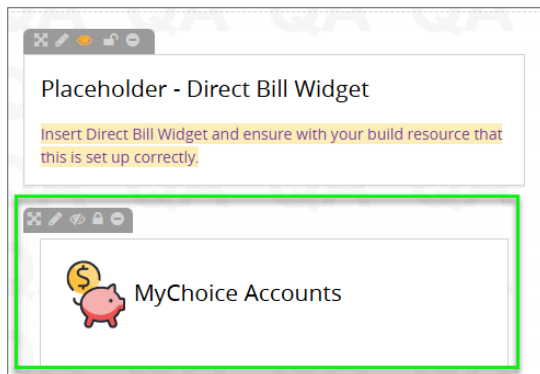
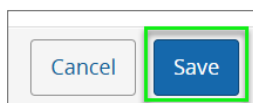
On the main landing page, **position the MCA Balance widget in the top right corner. If there is a Direct Bill / COBRA payment Service Widget, position the MCA Balance widget beneath it.**

1. Expand the **Components** pane on the left side of the page. Click and drag **MCA Balances** onto the layout.





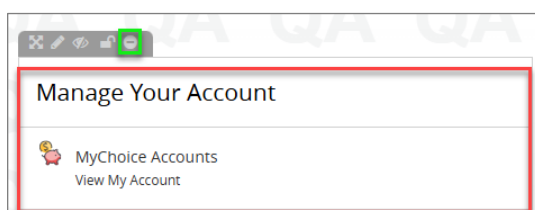
2. Click **Save**.



Member Home Microsite Pages

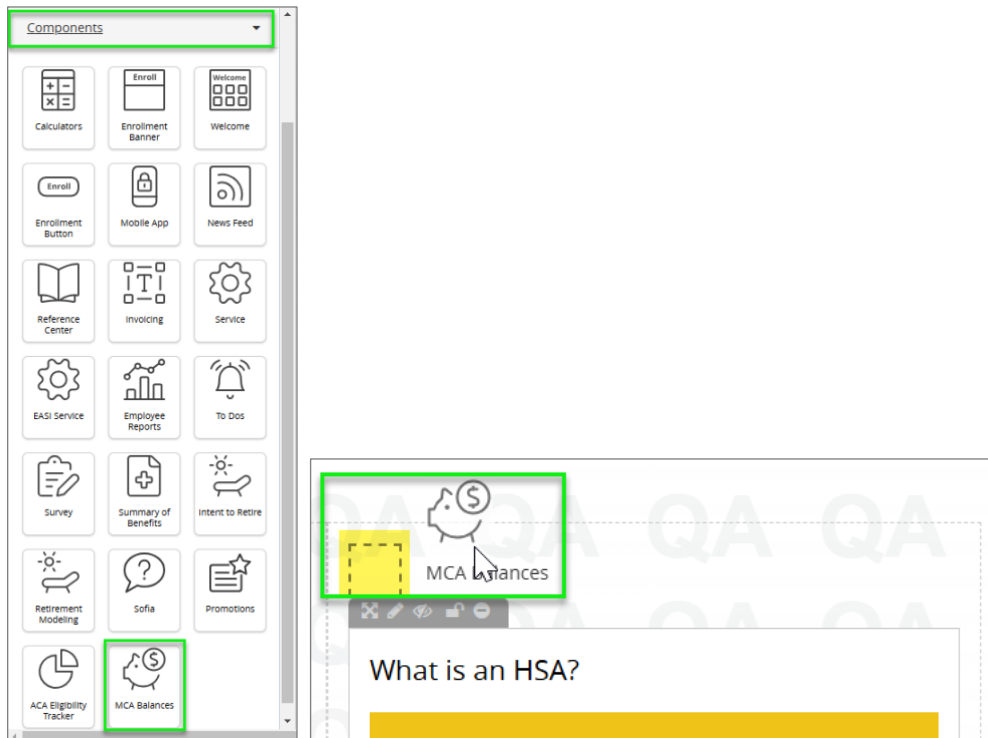
For each microsite on the Member Home page that is related to an MCA-administered consumer account (e.g., HSA, FSA, HRA), **position the MCA Balance widget in the top right corner. If there is a Welcome Widget with only “Consumer Accounts” selected, replace it with the MCA Balance widget.**

1. If applicable, delete the Welcome Widget with only “Consumer Accounts” selected.

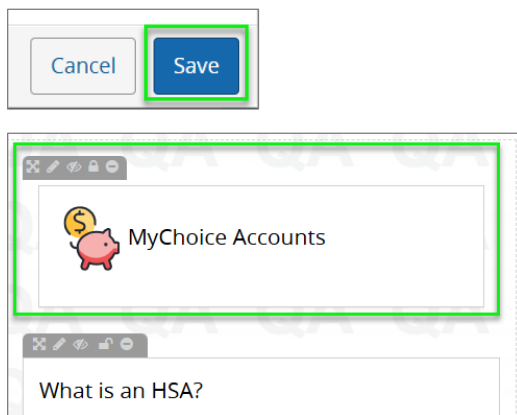




2. Expand the **Components** pane on the left side of the page. Click and drag **MCA Balances** onto the layout.



3. Click **Save**.



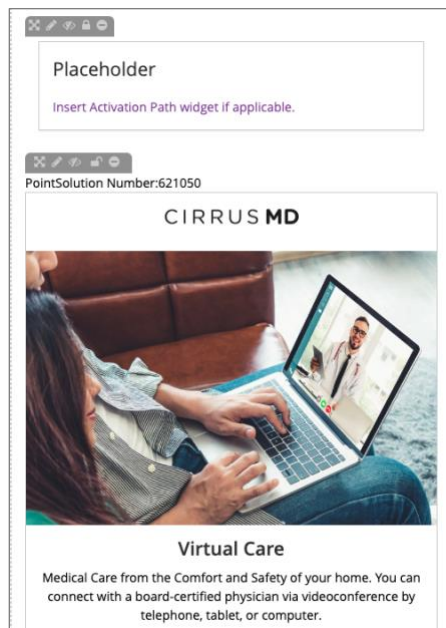
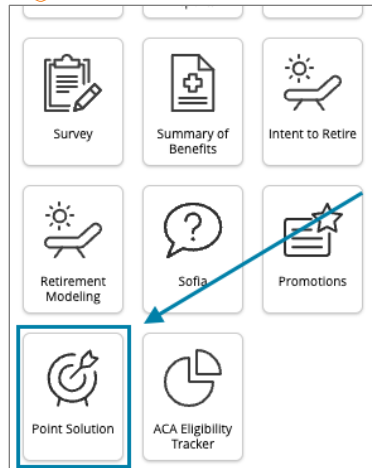
4. Repeat steps 1-3 above for each applicable microsite.

Review/Add Point Solution Widgets (if applicable)

If you contract for Activation Paths, members will have access to Point Solutions on the Benefit Programs page to activate on their benefits. If desired, additional Point Solution widgets can be added on the Member Home Layout to increase their visibility.

If you would like to add Point Solution widgets, reach out to your CSL/Client Services team for assistance with adding, reviewing, and testing the widgets.





Tasks for Member Mobile Layout Optimization

When a member navigates to Benefitsolver from the MyChoice Mobile app or directly via their mobile device's web browser, they are presented with the **Member – Mobile layout**, which is optimized for a mobile device.

Important!

If a Mobile layout is not created at the client level, they are presented with the system-level layout. Best practice is to create a Member – Mobile layout with widgets similar to the “regular” Member Home layout (e.g., EOI and Direct Bill widgets) so that a member on a mobile device can access the same services or information on their phones that they do on a computer.

Create New Member Mobile Layout

If there is not already a company-level Member Mobile layout, it's important to create a new Member Mobile layout from the optimized system template. Otherwise, members will see the default version, which is NOT optimized for the best member experience.

1. Navigate to **Company > Layout Manager**.





Company Benefits Employees Administration Reports

Company Information Custom Translation Layout Manager >
Company Access Custom Fields Admin Home
Company Structure Custom Views Slider
Structure Groups Custom Overrides Member Home
Rules Builder Rules Manager Partner Home
Formula Builder Dependent Home

2. In the **Add a Layout** section, complete the fields.
 - a. **Layout Name:** Enter "[company name] Optimized Member Mobile."
 - b. **Layout Type:** Select "Member - Mobile."
 - c. **Copy From:** Select "Optimized Member Mobile."
 - d. **Language:** Leave as default "english."
 - e. **Divisions:** Leave as "All," unless layout should only apply to certain Divisions.

Add a Layout

Layout Name: Cutting Edge 2023 Optimized Member Mobile
Layout Type: Member - Mobile
Copy From: -- None --
Language: english
Divisions: All

Add New Layout Import Layout

3. Click **Add New Layout**.

Add a Layout

Layout Name: Cutting Edge 2023 Optimized Member Mobile
Layout Type: Member - Mobile
Copy From: -- None --
Language: english
Divisions: All

Add New Layout Import Layout

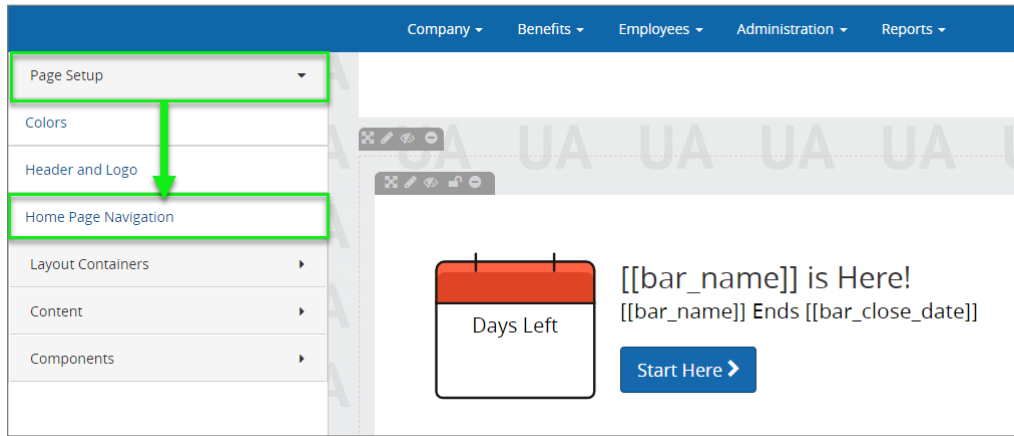
Review Home Page Navigation

[Benefitsolver > Client > Company > Layout Manager > Edit Member Mobile Layout](#)

Make sure the page navigation setup follows standards for an optimized member experience.

1. In the Member Mobile layout editing interface, click **Page Setup > Home Page Navigation** in the toolbar on the left side of the page.





2. Review the Home Page Navigation setup. Best practice is to have the following five pages (aka microsites):

- **Home**
- **Annual Enrollment**
- **Manage MyChoice Accounts** (if applicable to client)
- **Take Action**
- **Contacts**

	Anchor Tag	
Home		Show Hide Delete #004B8C
Annual Enrollment	AE	Copy URL Show Hide Delete #004B8C
Manage MyChoice Account	MCA	Copy URL Show Hide Delete #004B8C
Take Action	take-action	Copy URL Show Hide Delete #004B8C
Contacts	contacts	Copy URL Show Hide Delete #004B8C

Add Page

3. If updating an existing Member Mobile layout instead of creating a new one using the optimized system-level template, add pages as needed.

a. Click **Add Page**.





- b. Edit the **Page Title** and **Anchor Tag**.

Annual Enrollment AE Copy URL Show Hide Delete #0F66A8

Add Page

- c. Set the tab color. **#004B8C** is the optimized standard.

Annual Enrollment AE Copy URL Show Hide Delete #004B8C #0F66A8

Add Page

- d. Click **Save**.

Annual Enrollment AE Copy URL Show Hide Delete #0F66A8

Add Page

Close Save

4. The layout will show the pages. Click each page to review widgets.

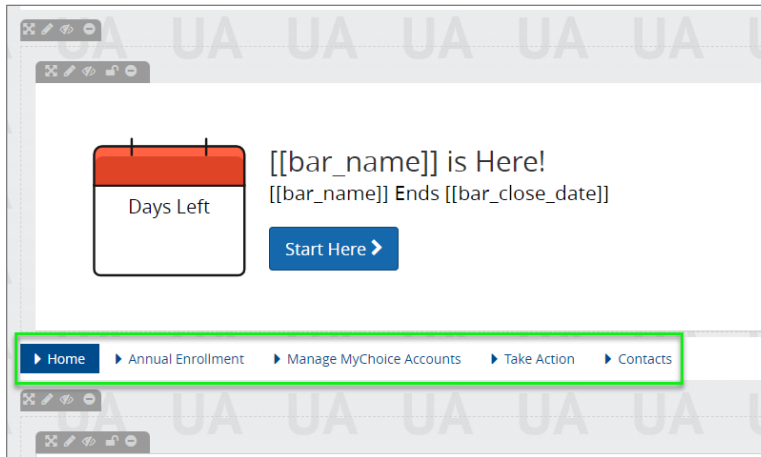
Review and Update Page Content

Benefitsolver > Client > Company > Layout Manager > Edit Member Mobile Layout

In the Mobile layout, review the content and widgets on each page.

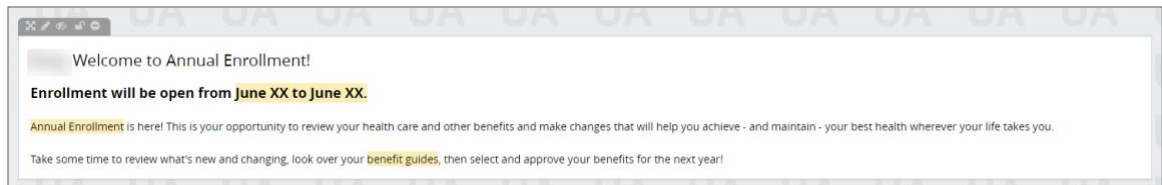
1. Click a page tab to view page content.



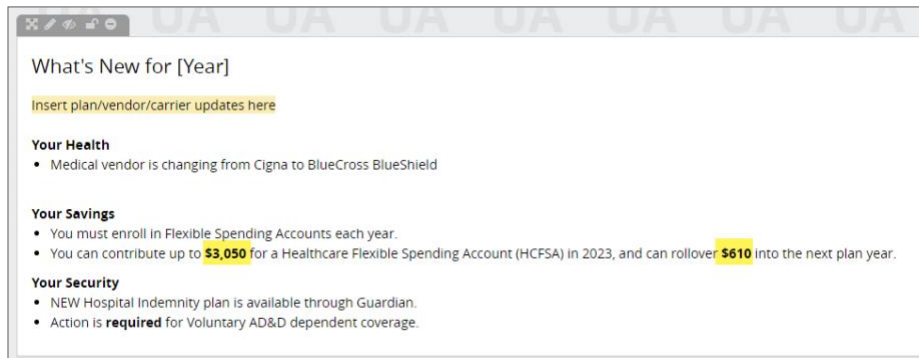


2. Review the following and update as needed:

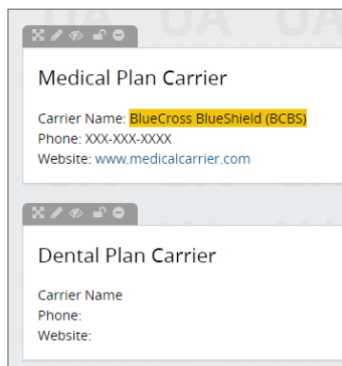
- Confirm there is nothing referring to past events—update dates.



- Confirm terminology is current.
- Confirm rates are updated or have notes about when they will be updated (for example, HSA/FSA contribution limits).



- Confirm Contacts Page is up to date.

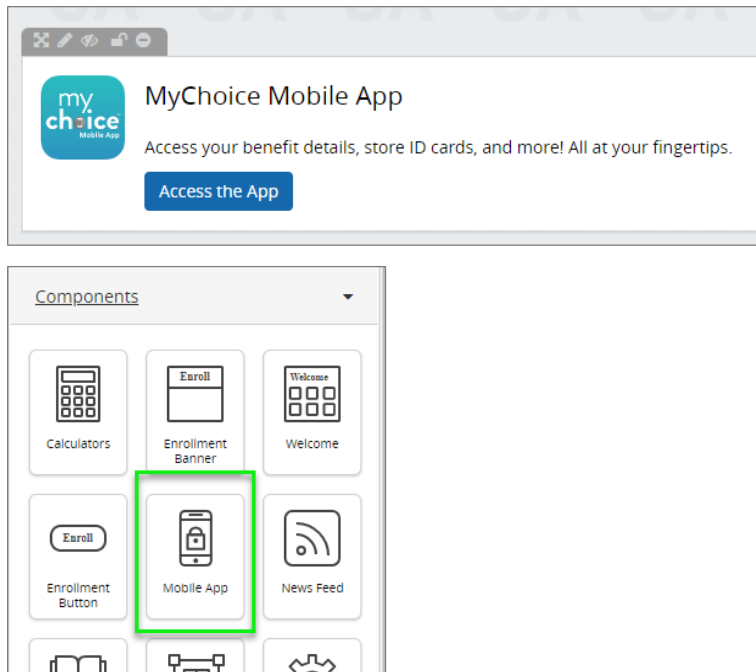


3. Make sure the **Home** page has the following widgets:





Mobile App Widget.

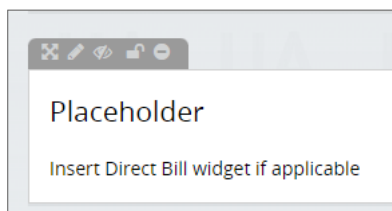


Direct Bill and COBRA Payment (if applicable).

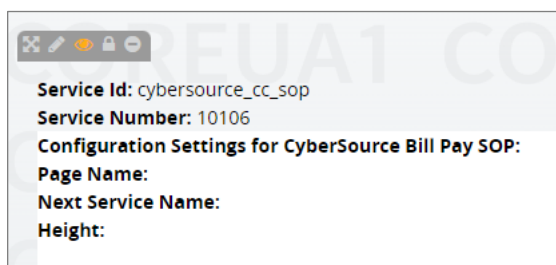
The Cybersource Service Widget allows members on Direct Bill and COBRA to make payments on the Mobile layout. Bill pay prompts in the MyChoice Mobile App will direct members to this widget on the Mobile experience. **work with your CSL/Client Services team to implement and test the widgets.**

Note

Setting up and testing these widgets may require assistance from your Client Services team. Review early with plenty of time before the layout goes live.



Example of a completed payment widget:



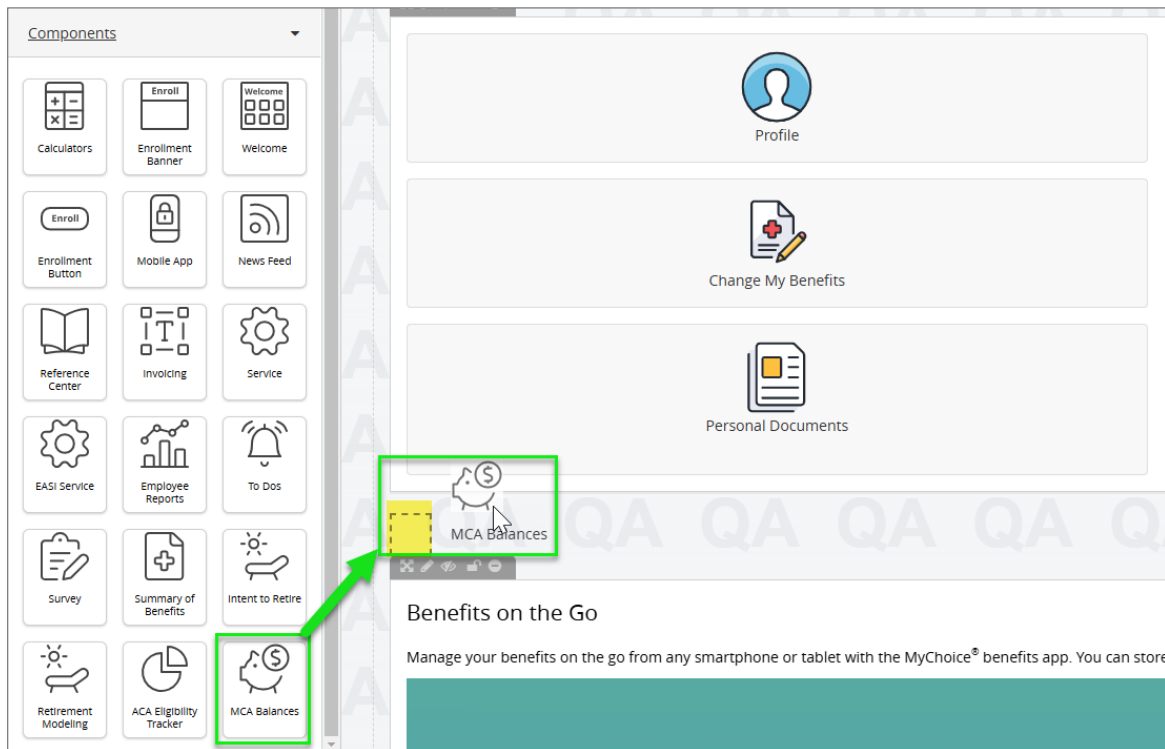
MCA Balance Widget (if applicable).





If you contract for MyChoice Accounts (MCA), be sure to include the **MCA Balance Widget** on the Member Mobile layout. The widget shows members balances for their accounts and provides a link to the MCA web experience.

Place the MCA Balance Widget below the Welcome Widget. If there is a Direct Bill / COBRA payment widget, place the MCA Balance Widget below that widget.

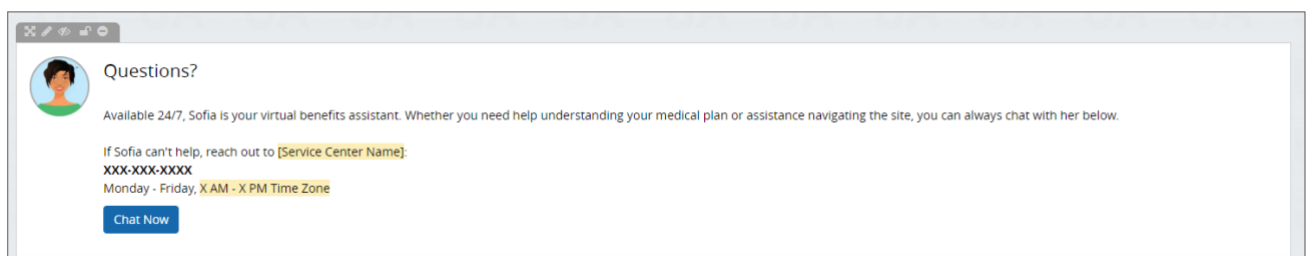


Review Sofia Content

[Benefitsolver](#) > [Client](#) > [Company](#) > [Layout Manager](#) > [Edit Member Mobile Layout](#)

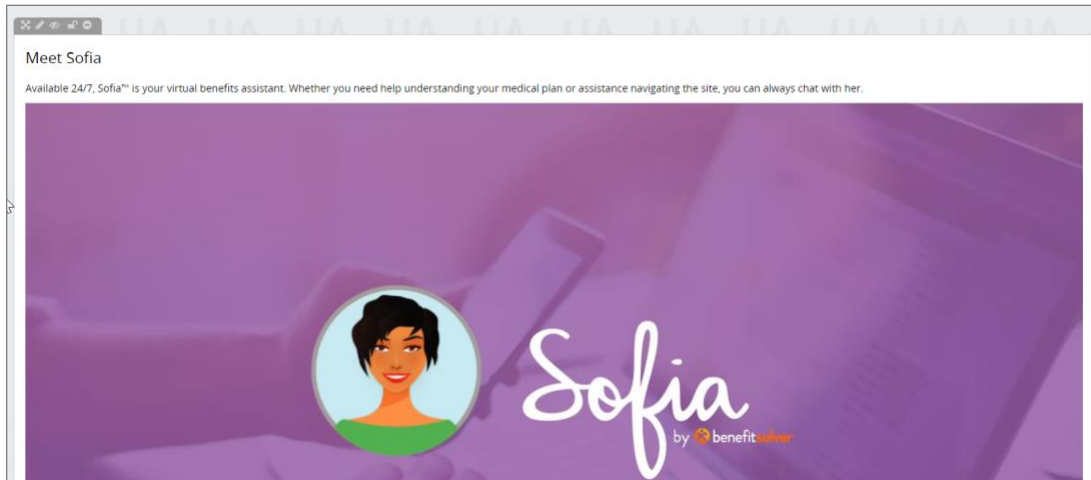
Review content on each page to make sure Sofia is sufficiently highlighted.

1. Confirm that the Sofia promotional widget is present on the Home page.

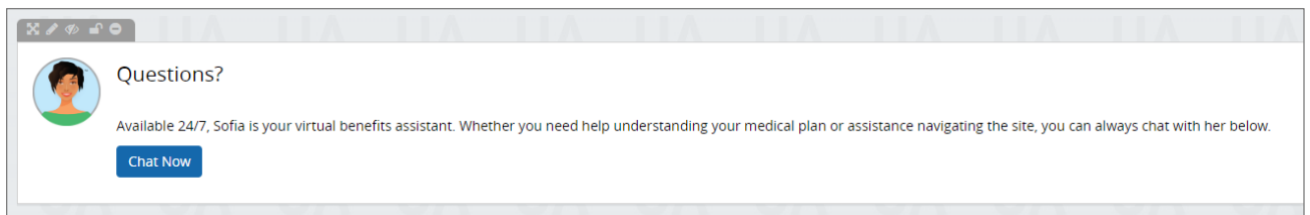


2. Confirm that the Sofia promotional video is present on the Homepage. Video link: <https://player.vimeo.com/video/454522952>





3. Confirm that Sofia is listed as a resource throughout all microsites and above Member Services.



Tasks for Sign On Layout Optimization

Create New Sign On Layout

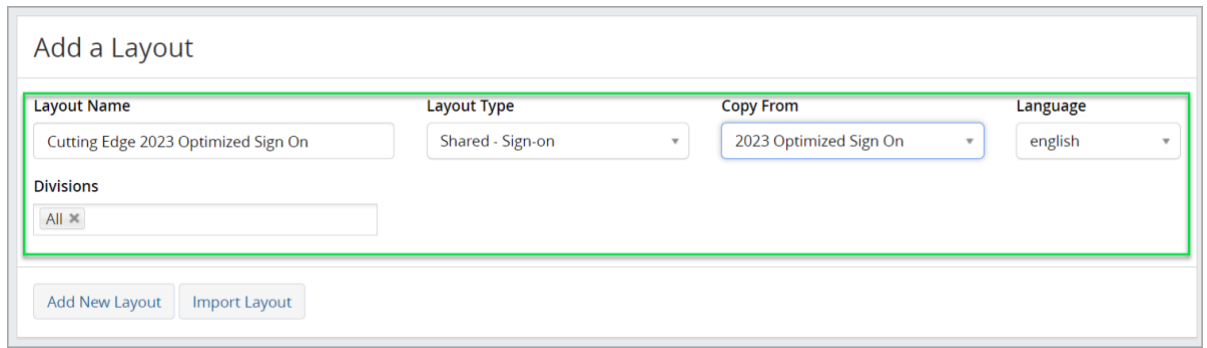
It's important to create a new Sign-on layout from the optimized system template and make edits to Custom Translations to provide company-specific info.

1. Navigate to **Company > Layout Manager**.



2. In the **Add a Layout** section, complete the fields.
 - a. **Layout Name:** Enter "[company name] Optimized Sign On."
 - b. **Layout Type:** Select "Shared - Sign-on."
 - c. **Copy From:** Select "Optimized Sign On."
 - d. **Language:** Leave as default "english."
 - e. **Divisions:** Leave as "All," unless layout should only apply to certain Divisions.





- ### Add a Layout

Layout Name <input type="text" value="Cutting Edge 2023 Optimized Sign On"/>	Layout Type <input type="text" value="Shared - Sign-on"/>	Copy From <input type="text" value="2023 Optimized Sign On"/>	Language <input type="text" value="english"/>
Divisions <input type="text" value="All"/>			
<input type="button" value="Add New Layout"/>		<input type="button" value="Import Layout"/>	

-
- The screenshot shows the 'Home - 1 Population' page of a Benefits Portal. The navigation bar at the top includes links for 'Home - 1 Population', 'Home - Multi-Population', 'Actives', 'Retirees', 'New Hires', and 'Prospective Employees'. The main content area features a large blue banner with the text 'Welcome to your Benefits Portal'. On the left, a sidebar menu is visible with options: 'Page Setup', 'Colors', 'Header and Logo', and 'Home Page Navigation' (which is highlighted with a green border).





Home Page Navigation

Home - 1 Population	Show Hide Delete #004B8C
Home - Multi-Population	Show Hide Delete #00205B
Actives	Show Hide Delete #00205B
Retirees	Show Hide Delete #004B8C
New Hires	Show Hide Delete #00205B
Prospective Employees	Show Hide Delete #00205B
FAQ	Show Hide Delete #00205B

Add Page

- b. Update the content on Sign On pages to match company language/tone standards.
- c. Update SSO information if applicable. Use the “Multi-Population” microsite to instruct members how to log in via their SSO protocol.

[Company name] Benefit Center!

Active or Current Employee?
If you are an active or current employee, please login at [insert company SSO link].

Retiree?
If this is your first time using your benefit site, please click Register and verify your information.

- d. Delete widgets that are not applicable.
- e. Update **Forgot Password Text** Custom Translation to include company-specific technical support information on the “Trouble Logging In” page.

Password Reset

Verify User Information

Social Security Number *

123-45-6789

Date of Birth *

MM/DD/YYYY

Zip Code

Enter a valid US zip code, US zip code+4, Canadian, or Foreign postal code. If you do not have a zip or postal code on file, leave blank.

Company Key
CXDemo [Change](#)

Directions

Can't remember your user name or password?
Please enter your Social Security Number, Date of Birth, and Zip Code, then click “Continue” to retrieve your user name or reset your password.

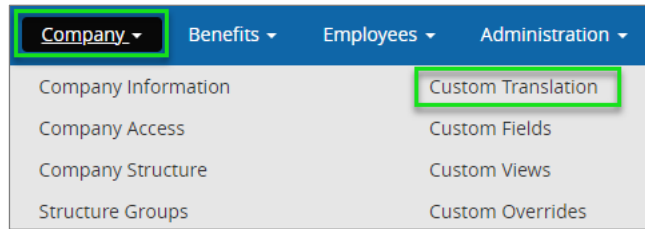
Don't have an account?
Click cancel and register on the previous login screen.

If you are still not able to log in, you can receive technical support by calling [insert Client Service Center Number xxx-xxx-xxxx].

[Cancel](#) [Continue >](#)

- i. Navigate to **Company > Custom Translation**.





-
- Company - Custom Translations**
- Translations Opening/Closing Messages Definitions
- Custom Translations** [+ Add Translation](#)
- Custom**
- Please Select a Definition
- Default**
- Please Select a Definition
- Forgot
- Forgot Password**
- Forgot Password Text
- Forgot User Name or Password

- ## Custom Translations

[+ Add Translation](#)

Custom	Default
<div>Please Select a Definition ▾</div>	<div>Forgot Password ▾</div>

Translation

Translation ID

Forgot Password

Division BAR Type BAR Name ⓘ

<< Company Level >> ▾

<< All >> ▾

<< All >> ▾

english

16px ▾

B I U [List Icons] [Link Icon] A [Color Picker] [Image Icon] [Table Icon] <>

Forgot your user name or password?

español

16px ▾

B I U [List Icons] [Link Icon] A [Color Picker] [Image Icon] [Table Icon] <>

¿Se le ha olvidado su contraseña?

français

Do NOT change the Translation ID or relabel as "custom." Leave the default title!





- iv. After you've updated the English, Espanol, and Francais text, click **Save** at the bottom of the Translation section.

- v. Custom Translations can vary on how long they take to show up; usually it is within 30 minutes but can take longer sometimes. If updating in the Production environment, this will refresh based on lower environment cycles.

Visual Guide of Widgets Used in Optimized Member Home Layout

The Following visual aids for the main Member Home page and a microsite (next page) shows where commonly used widgets display to members on the optimized Member Home layout template, as well as the tiles that represent each widget when building out the layout.





[[bar_name]] is Here!
[[bar_name]] Ends [[bar_close_date]]

Days Left

Start Here >

Components > Enrollment Banner

Home Page Navigation

Home > Annual Enrollment > Enroll in New Hire Benefits > Medical Insurance > Critical Illness Insurance > Hospital Indemnity Insurance > Employee Assistance Program > Dependent Care FSA > Commuter Benefits > Tuition Reimbursement > Flexible Spending Account > Pet Insurance > Recovery Insurance > Adding a Child

Page Setup > Home Page Navigation

Legal Insurance > Device Protection > Cancer Insurance > Long Term Care Insurance > Submit Evidence of Insurability > Submit a MyChoice Accounts Claim > Getting Married > Getting a Divorce > Planning to Retire > Losing a Loved One

Welcome to the Acme Benefits Center

Components > Sofia

Layout Containers > Container > Add Container (Two Column Right)

Welcome, Cory

Profile

Benefit Summary

Components > Welcome

Change My Benefits

Welcome

Compare Plans

Personal Documents

MyChoice Accounts

View My Account

2023 Acme Company Updates

Vendor Carrier Changes

Health Assessments & Upcoming Webinars in Q1 2023

Components > Point Solution

PointSolution Number: 62

PointSolution Number: 621035

Components > Service

Service Id: cybersource_cc_sop
Service Number: 10106
Configuration Settings for CyberSource Bill Pay Sol
Page Name:
Next Service Name:
Height:

Layout Containers > Container > Add Container (Three Column)

Components > To Dos

Important Reminders

Action Required

Components > Mobile App

MyChoice Mobile App

Access your benefit details, store ID cards, and more! All at your fingertips.

Access the App

Reference Center

Components > Reference Center (by tags)

Benefit Guide

Medical

Open Enrollment

Questions?

Available 24/7, Sofia is your virtual benefits assistant. If Sofia can't help, reach out to:
(Member Service Name):
XXX-XXX-XXXX
7am - 7pm CST

Benefits on the Go

Manage your benefits smartphone or tablet, access coverage detail

Content > Text

Meet Sofia

Available 24/7, Sofia™ is your virtual benefits assistant. Whether you need help understanding your medical plan or assistance navigating the site, you can always chat with her.

Benefits Tailored to You

Enroll using the MyChoice Recommendation Engine™ to get guidance when choosing the right benefits. Answer a few questions about your health and lifestyle, and you will receive a personalized recommendation.





[Home](#) [Dependent Verification Audit](#) [Enroll in New Hire Benefits](#) [Benefits Information](#) [I Want To...](#)

Dental Insurance

Content > Text

Dental health is an important part of your overall health—and a good one you may have more than one dental plan option to choose from.

Content > Text

Eligibility

- If you're an **active full-time employee** or a **part-time employee**, you may participate in the DPPO or DMO Plan and eligible for dental benefits. You're not eligible for dental benefits if you're a contractor, a temporary or leased employee, or a collective bargaining agreement not covered under the plan.
- If you're eligible to participate in a DMO Plan—meaning that one is available in your area—the option will appear during Annual Enrollment (or new hire) or if you experience a qualified life event or family status change during the year.

Content > Text

Plan Options

Content > Tabs (Vertical)

- Plan Option 1 Name Here
- Plan Option 2 Name Here
- Plan Option 3 Name Here

Compare Your Plans

Content > Text

Dental Plan	{Plan 1}	{Plan 2}	{Plan 3}
Annual Calendar Year Deductible			
Single	\$X,XXX	\$X,XXX	\$X,XXX
Family	\$X,XXX	\$X,XXX	\$X,XXX
Annual Out-of-Pocket Maximum			
Single	\$X,XXX	\$X,XXX	\$X,XXX
Family	\$X,XXX	\$X,XXX	\$X,XXX
Lifetime Maximum			
Lifetime Maximum Benefit for Orthodontics	X% after deductible	X% after deductible	X%
Services			
Diagnostic and Preventive (Oral exams, Cleanings, Fluoride treatments)	X% after deductible	X% after deductible	\$X copay
Basic (Simple Extractions, Minor Restorative Services, Periodontics, Rellines and Repairs of Bridges and Dentures)	X% after deductible	X% after deductible	\$X copay
Major Restorative (Root Canals, Crowns, Bridges, Implants, Dentures)	\$X (deductible waived)	\$X (deductible waived)	\$X (copay waived)
Orthodontic Services	X% after deductible	X% after deductible	\$X copay

Content > Promo

INSERT CARRIER LOGO HERE

Dental Plan Content

XXX-XXX-XXXX

www.urlplaceholder.com

Components > Welcome

Welcome

Review Plan Rates

Compare Plans

Components > Mobile App

MyChoice Mobile App

Access your benefit details, store ID cards, and more! All at your fingertips.

Access the App

Components > Reference Center (by tags)

Reference Center

Medical

Components > Sofia

I'm Sofia, your virtual benefits assistant. How can I help?

Ask me anything about benefits



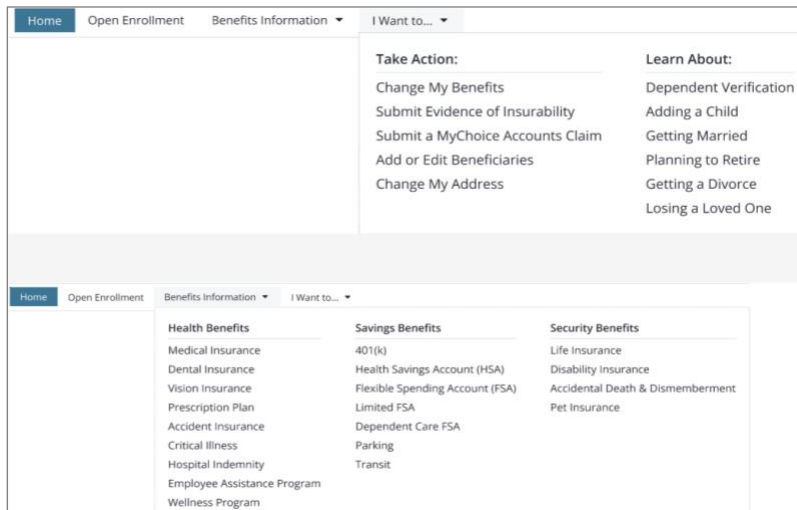


Enrollment Banner Widget

The Enrollment Banner is used to add a visually appealing reminder for any enrollments that are available to a member (e.g., Open Enrollment, New Hire Enrollment). Admins can adjust the banner's Title and Sub-Title, and can select a background image as well. The Enrollment Banner is dynamic and will automatically display (or not display) the appropriate enrollment window information based on each member's eligibility.

Home Page Navigation

In this section in the layout building tools, admins set up microsites and submenus on the Member Home layout to organize the member-facing information into separate pages accessible via a cascading menu. The system-level "Optimized Member Home" template has a default menu structure that follows best practices, but admins may reorganize and hide/add pages as needed. Example of how the menu displays to members:



Text Widget

Allows admins to easily insert a line or a paragraph of text within the layout. Admins can easily control the size, color, alignment, and structure of the text. Additionally, admins can personalize the text for members by inserting system-populated text fields to display items such as the member's specific demographic information.

Layout Containers

Widgets can only be added to a layout within an existing Container widget. Containers can have their own visibility settings, and multiple widgets may be placed within a Container.

To Dos Widget

This is a dynamic widget that displays any "To Do" items the member needs to complete, such as Pending EOI, Pending Dependent Verification, or enrollment events that need to be completed. To Do widgets are important for members because they signal a call to action when the member is required to do something.

Mobile App Widget

Gives members access to the MyChoice Mobile App. This widget provides a QR code or authentication code the member needs to register their account with the MyChoice Mobile App.





Welcome Widget

Provides a personalized greeting with the member's name, and admins can select to include some important areas of the system, such as a member's profile, benefit summary, or personal documents.

Tabs Widget

Tabs widgets are used to vertically organize text within a layout so that it doesn't seem overwhelming to the reader. Rather than adding multiple paragraphs that extend to the entire length of the layout page, this widget organizes text into different tabs. Admins can add as many tabs as needed and can make the content searchable.

Vertical Tab Widgets are preferred over horizontal widgets. In user testing, the data verified that vertical tab widgets are easier to see and compare information from tab to tab. In a horizontal widget, the information is replaced, whereas in a vertical tab widget, members are able to easily expand information at their own pace.

Reference Center Widget

This widget provides easy access to documents that have already been uploaded to the Reference Center. Admins can choose to display all Reference Center documents available to the member/admin or display specific Reference Center documents based upon how the documents have been tagged. For example, you can select to display only the Reference Center documents that have been tagged "Medical."

Note

It is best practice to NOT include the Reference Center widget on Member Election layouts if Sofia > Conversational Enrollment is enabled in Company Access > Confirmed Services. However, it is still fine to have the Reference Center widget on the Member Home layout.

Promo Widget

Promo widgets are used to highlight a specific program, product, or document. They can also be used to promote a specific voluntary product.

Point Solution Widget

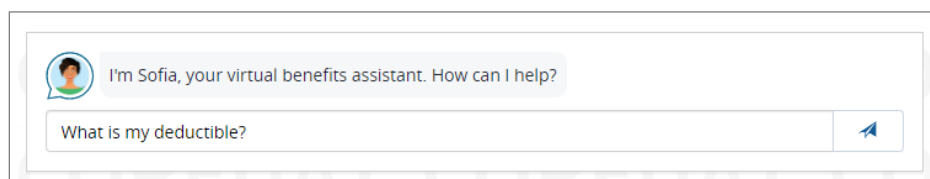
Point Solution Widgets provide another clickable tile for members to activate on their benefits. Members can access Point Solutions from the Benefit Programs page, but widgets for individual Point Solutions can also be added to the Member Home layout (including for MyChoice Find a Provider).

Service Widget

Service Widgets are generally used to create connections to other systems, for example, SSO portals for employees to connect to vendors and submit EOI. They are also used to provide online payment options for members for COBRA and Direct Bill.

Sofia Widget

The Sofia widget puts Sofia front-and-center on the Member Home page. Members can type and submit a question in the widget to open Sofia's chat window.





Appendix A: Checklist for Member Home Page Navigation Optimization

Use this editable checklist during your initial review of your Member Home layouts to identify and mark which microsites and submenus need to be shown to members and whether the content on each page requires updates.

- There are two columns with editable fields:
 - **Process A: System CX Member Home Layout:** Use this column to indicate if the microsite/submenu on the system-level layout should be shown/hidden.
 - **Process B: Copy of Current Client Member Home Layout:** Use this column to indicate if the microsite exists and/or needs updates on the existing layout.

		Process A System CX Member Home Layout	Process B Copy of Current Client Member Home Layout			Process A System CX Member Home Layout	Process B Copy of Current Client Member Home Layout
Microsite Name					Microsite Name		
1	> Home	Show	Add Page	27	> Security Benefits	Show	Add Submenu
2	> Annual Enrollment	Show	Add Page	28	> Life Insurance	Show	Add Page
3	> Benefits Information	Show	Add Submenu	29	> Disability Insurance	Show	Add Page
4	> Health Benefits	Show	Add Submenu	30	> Accidental Death and Dismemberment	Show	Add Page
5	> Medical Insurance	Show	Add Page	31	> Pet Insurance	Show	Add Page
6	> Dental Insurance	Show	Add Page	32	> Legal Insurance	Show	Add Page
7	> Vision Insurance	Show	Add Page	33	> Device Protection	Show	Add Page
8	> Prescription Plan	Show	Add Page	34	> Cancer Insurance	Show	Add Page
9	> Accident Insurance	Show	Add Page	35	> Identity Theft Protection	Show	Add Page
10	> Critical Illness Insurance	Show	Add Page	36	> Long-term Care Insurance	Show	Add Page
11	> Hospital Indemnity Insurance	Show	Add Page	37	> Home & Auto Insurance	Show	Add Page
12	> Employee Assistance Program	Show	Add Page	38	> Disaster Recovery Insurance	Show	Add Page
13	> Wellness Program	Show	Add Page	39	> I Want To . . .	Show	Add Submenu
14	> Savings Benefits	Show	Add Submenu	40	> Take Action	Show	Add Submenu
15	> 401K	Show	Add Page	41	> Change My Address	Show	Add Page
16	> Health Savings Account	Show	Add Page	42	> Learn About	Show	Add Page
17	> Health Care FSA	Show	Add Page	43	> Benefit Verification	Show	Add Page
18	> Dependent Care FSA	Show	Add Page	44	> Adding a child	Show	Add Page
19	> Commuter Benefits	Show	Add Page	45	> Getting Married	Show	Add Page
20	> Tuition Reimbursement	Show	Add Page	46	> Getting Divorced	Show	Add Page
21	> Health Reimbursement Arrangement	Show	Add Page	47	> Planning to Retire	Show	Add Page





22	> Retiree Medical Account	Show	Add Page	48	> Losing a Loved One	Show	Add Page
23	> Adoption Assistance	Show	Add Page	49	> Learn About	Show	Add Submenu
24	> Employee Sponsored Program	Show	Add Page	50	> Dependent Verification	Show	Add Page
25	> Fitness Account	Show	Add Page	51	> Adding a Child	Show	Add Page
26	> Medical Travel Account	Show	Add Page	52	> Getting Married	Show	Add Page
		Leave default	Ignore	53	> Getting a Divorce	Show	Add Page
	Benefits Contact Info	Hide	N/A	54	> Planning to Retire	Show	Add Page
	> Delete This	Hide	N/A	55	> Losing a Loved One	Show	Add Page
	> Delete This	Hide	N/A				
	> Delete This	Hide	N/A				





Appendix B: Document Revision History

Version	Date of Update	Updated by	Requested by	Summary
01 00 00 N/A	8/23/2023	Cstark	Alakowske	<ul style="list-style-type: none">Net new document for CSLs to share with clients. Client admins can use this as a guide when doing their own CX Optimization review of member-facing layouts.
01.01.N/A	2/28/2024	Cstark	Alakowske/ bzerwas	<ul style="list-style-type: none">Made evergreen. Added new areas and instructions for review, mobile layout, service & point solution widgets, updated visual guide of widgets.
01.02.N/A	5/20/2024	Cstark	Mmease	<ul style="list-style-type: none">Added note that Ref Center widget shouldn't be added to Member Election layout when Sofia > Conversational Enrollment is enabled.
1.03.N/A	5/28/2024	Cstark	Alakowske	<ul style="list-style-type: none">Added call-out for Company Information updates when client uses Help Link setting. Called out importance of client-level vs system-level mobile layouts.
1.04.N/A	5/29/2024	Cstark	Alakowske	<ul style="list-style-type: none">Added Sofia (chat) widget and visual guide of widgets on microsite.
1.05.N/A	2/25/2025	Cstark	Alakowske	<ul style="list-style-type: none">Added MCA Balance Widget

