

MyTRS Study Report

Report created by:
UX Team, Communications Division
August, 2024

Index

Introduction

Background	04
Terminology	05
Evaluation Study Process	05
Counselor Interviews	05

Key Findings and Recommendations

General Recommendations	07
Task Based Recommendations	09
Tentative Issues Ranking/Priority	09

Appendix

Introduction

Background

A UX Research study was conducted to evaluate the current usability and design of the *MyTRS* platform. The study was conducted in two parts: an evaluation study based on expert review and a qualitative study including interviews.

Goals

- Identify usability issues and opportunities for improvement in the member portal
- Offer actionable recommendations for immediate or future implementation - keeping all the constraints in mind - such as feasibility, PBT-cutoff, etc.

Methodology

- Evaluation Study: Heuristic Evaluation, Cognitive Walkthrough and Pragmatic Usability Rating by Experts (PURE Rating)
Eight tasks were identified for the study based on importance of tasks (request an estimate, apply for retirement, benefit calculator, schedule an appointment) and feasibility of evaluation (update member information and view membership card).

- Interviews:

Conducted qualitative interviews with 4 benefit counselors and Lori LaBrie, TRS Ombudswoman.




Terminology

Heuristic Evaluation: It is a usability assessment method where experts review an interface based on Jakob Nielsen's 10 principles. These principles include ensuring users are informed about system status, using familiar language, and providing user control and freedom. The evaluation emphasizes consistency, error prevention, and minimizing cognitive load by making information easily recognizable.

Cognitive Walkthrough: A cognitive walkthrough is a usability evaluation method where experts simulate a user's problem-solving process to identify usability issues. It focuses on whether users can understand and accomplish tasks effectively based on their knowledge and experience with the interface.

Pragmatic Usability Rating by Experts (PURE): PURE is a usability-evaluation method in which usability experts assign one or more quantitative ratings to a design based on a set of criteria and then combine all these ratings into a final score and easy-to-understand visual representation.

The PURE rating scale is displayed in the figure beside.

	The step can be accomplished easily by the target user, due to low cognitive load or because it's a known pattern, such as the acceptance of a terms-of-service agreement.
	The step requires a notable degree of cognitive load (or physical effort) by the target user, but can generally be accomplished with some effort.
	The step is difficult for the target user , due to significant cognitive load or confusion; some target users would likely fail or abandon the task at this point.

Evaluation Study Process

Evaluation Study: It is a usability assessment method where experts review an interface based on Jakob Nielsen's 10 principles.

Panel size

3

UX Evaluators

Esther Cho
Jacob Goebel
Jenny John

Timeline

3

weeks

Design evaluation and usability rating (PURE Rating) from evaluators

Methodology

8

tasks

Narrowed down to 8 key tasks on the *MyTRS* portal

Evaluation Study Process

- 1** View TRS Membership Card
Involved 4 sub-steps
PURE Rating of 7
- 2** Update Preferred Mode of Communication
Involved 5 sub-steps
PURE Rating of 8
- 3** Update Address
Involved 5 Sub-steps
PURE Rating of 8
- 4** Update Phone Number
Involved 4 sub-steps
PURE Rating of 7
- 5** Benefit Calculator
Involved 7 sub-steps
PURE Rating of 11
- 6** Request an Estimate
Involved 5 Sub-steps
PURE Rating of 6
- 7** Schedule an Appointment
Involved 7 sub-steps
PURE Rating of 11
- 8** Apply for Retirement
Involved 8 sub-steps
PURE Rating of 17

Counselor Interviews

Counselor Interviews: It is a usability assessment method where experts review an interface based on Jakob Nielsen's 10 principles.

Panel size

5

Counselors

2 In-person benefit counselors
2 Telephone benefit counselors
1 Ombuds counselor

Timeline

2

weeks

Conduct interviews and
consolidate findings

Method

30

minute semi-structured interviews

Location: virtual

Interviewers/note-takers:

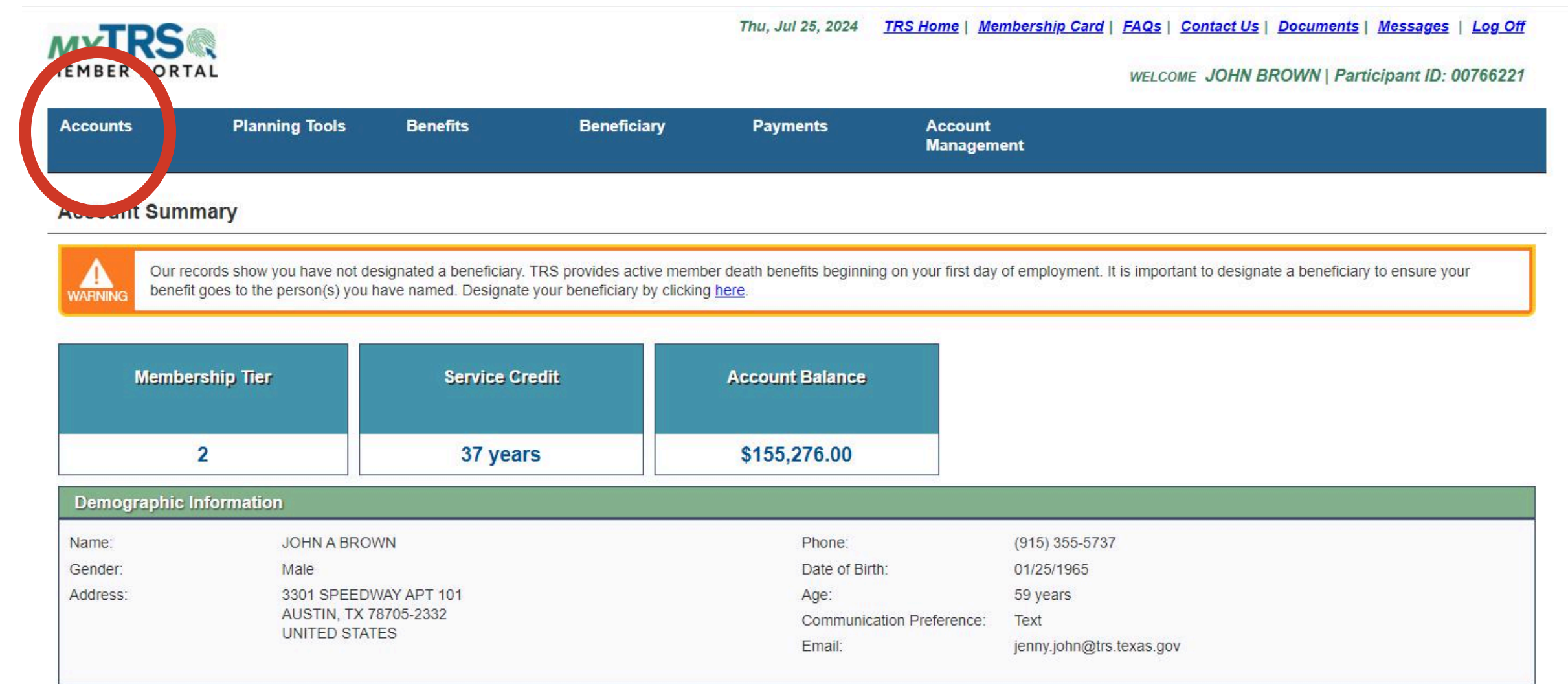
Jacob Goebel
Esther Cho

Key Findings and Recommendations

General Recommendations

Unclear label “Accounts”

- Change label “Accounts and use it consistently across the portal.
- Suggested labels:
Home
Dashboard or Account Dashboard
MyTRS Home



myTRS MEMBER PORTAL

Thu, Jul 25, 2024 [TRS Home](#) | [Membership Card](#) | [FAQs](#) | [Contact Us](#) | [Documents](#) | [Messages](#) | [Log Off](#)

WELCOME JOHN BROWN | Participant ID: 00766221

Accounts Planning Tools Benefits Beneficiary Payments Account Management

Account Summary

WARNING Our records show you have not designated a beneficiary. TRS provides active member death benefits beginning on your first day of employment. It is important to designate a beneficiary to ensure your benefit goes to the person(s) you have named. Designate your beneficiary by clicking [here](#).

Membership Tier	Service Credit	Account Balance
2	37 years	\$155,276.00

Demographic Information

Name:	JOHN A BROWN	Phone:	(915) 355-5737
Gender:	Male	Date of Birth:	01/25/1965
Address:	3301 SPEEDWAY APT 101 AUSTIN, TX 78705-2332 UNITED STATES	Age:	59 years
		Communication Preference:	Text
		Email:	jenny.john@trs.texas.gov

Co-browsing

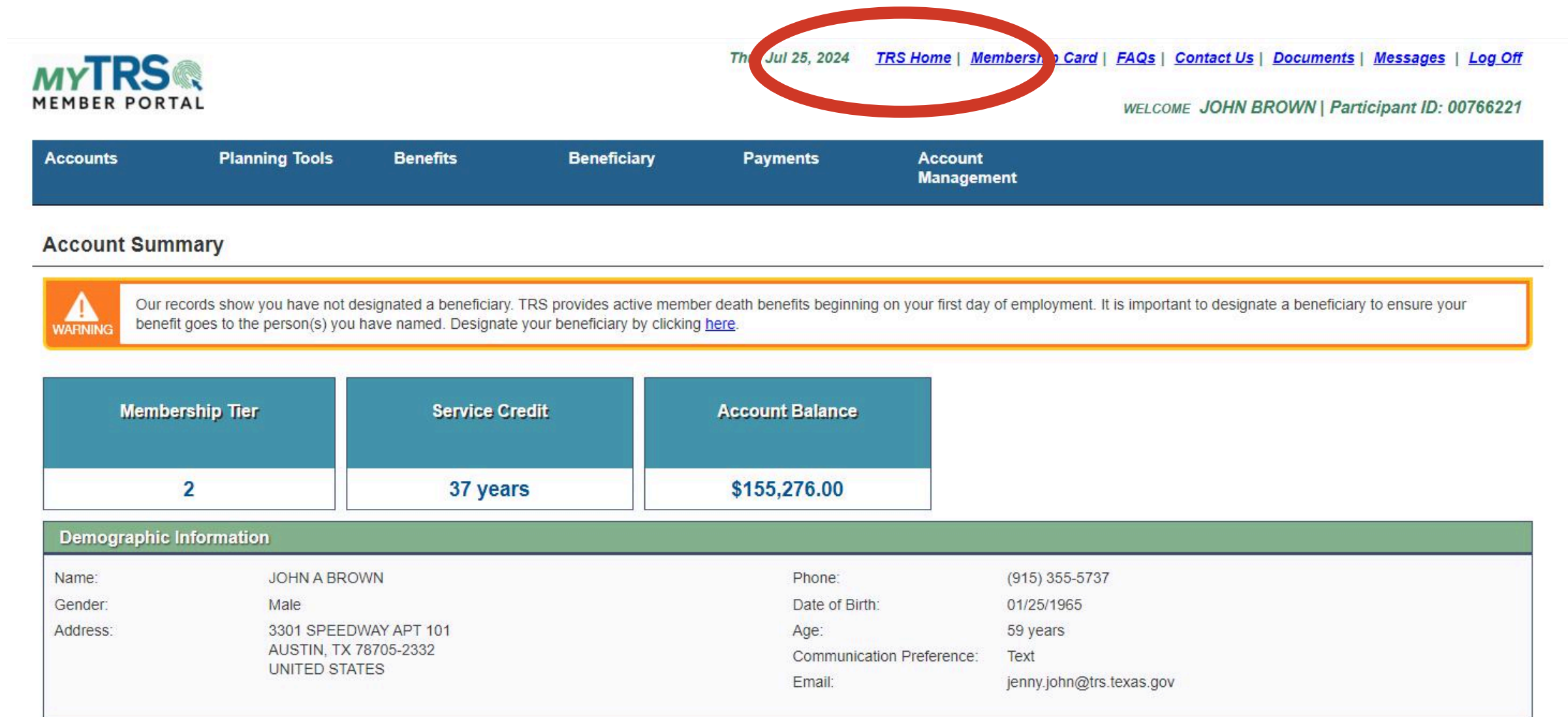
Need help with MyTRS? A TRS counselor can also assist you by starting a co-browsing session. First, call the phone number on the left. Once you are connected with a counselor, click "Agree" to start a co-browsing session. By clicking "Agree" you are allowing the telephone counselor to browse the website with you. The counselor will not see login details, passwords, or other browser tabs/programs you may have opened.

Once the session is initiated, a screen will pop up with a "Session ID". You will need to advise the counselor that you would like to start a co-browsing session and provide them with the Session ID. You can stop co-browsing at any time by clicking the End Session button. **Co-browsing is not supported on mobile devices, tablets, or Safari internet browsers.**

Agree Return to Home Page

Unclear label “TRS Home”

- Change “TRS Home” to TRS Website clarify the distinction and indicate that it is the external website



The screenshot shows the MY TRS Member Portal interface. At the top left is the logo "MY TRS MEMBER PORTAL". To the right, the date "Thu Jul 25, 2024" is displayed, followed by a navigation menu with links: "TRS Home", "Membership Card", "FAQs", "Contact Us", "Documents", "Messages", and "Log Off". The "TRS Home" link is circled in red. Below the navigation menu is a dark blue bar with white text for "Accounts", "Planning Tools", "Benefits", "Beneficiary", "Payments", and "Account Management". Underneath is the "Account Summary" section, which includes a warning message: "Our records show you have not designated a beneficiary. TRS provides active member death benefits beginning on your first day of employment. It is important to designate a beneficiary to ensure your benefit goes to the person(s) you have named. Designate your beneficiary by clicking [here](#)." Below the warning are three summary cards: "Membership Tier" with value "2", "Service Credit" with value "37 years", and "Account Balance" with value "\$155,276.00". At the bottom is the "Demographic Information" section with the following details:

Demographic Information			
Name:	JOHN A BROWN	Phone:	(915) 355-5737
Gender:	Male	Date of Birth:	01/25/1965
Address:	3301 SPEEDWAY APT 101 AUSTIN, TX 78705-2332 UNITED STATES	Age:	59 years
		Communication Preference:	Text
		Email:	jenny.john@trs.texas.gov

Improve the ordering of top-menu items

- Reorder navigation menu items to group external links together.

- Suggested order:

Documents

Messages

Membership Card

Contact Us

TRS Website [↗](#)

FAQ's [↗](#)

Log Off [↗](#)

The screenshot shows the myTRS Member Portal interface. At the top right, a navigation menu is circled in red, containing the following items: Thu, Jul 25, 2024, TRS Home, Membership Card, FAQs, Contact Us, Documents, Messages, and Log Off. Below this, a welcome message reads: WELCOME JOHN BROWN | Participant ID: 00766221. A dark blue navigation bar contains the following menu items: Accounts, Planning Tools, Benefits, Beneficiary, Payments, and Account Management. Below the navigation bar is the 'Account Summary' section, which includes a warning message: 'Our records show you have not designated a beneficiary. TRS provides active member death benefits beginning on your first day of employment. It is important to designate a beneficiary to ensure your benefit goes to the person(s) you have named. Designate your beneficiary by clicking here.' Below the warning is a table with three columns: Membership Tier (2), Service Credit (37 years), and Account Balance (\$155,276.00). At the bottom is the 'Demographic Information' section, which includes the following details: Name: JOHN A BROWN, Gender: Male, Address: 3301 SPEEDWAY APT 101, AUSTIN, TX 78705-2332, UNITED STATES, Phone: (915) 355-5737, Date of Birth: 01/25/1965, Age: 59 years, Communication Preference: Text, and Email: jenny.john@trs.texas.gov.

myTRS
MEMBER PORTAL

Thu, Jul 25, 2024 | [TRS Home](#) | [Membership Card](#) | [FAQs](#) | [Contact Us](#) | [Documents](#) | [Messages](#) | [Log Off](#)

WELCOME JOHN BROWN | Participant ID: 00766221

Accounts | Planning Tools | Benefits | Beneficiary | Payments | Account Management

Account Summary

WARNING Our records show you have not designated a beneficiary. TRS provides active member death benefits beginning on your first day of employment. It is important to designate a beneficiary to ensure your benefit goes to the person(s) you have named. Designate your beneficiary by clicking [here](#).

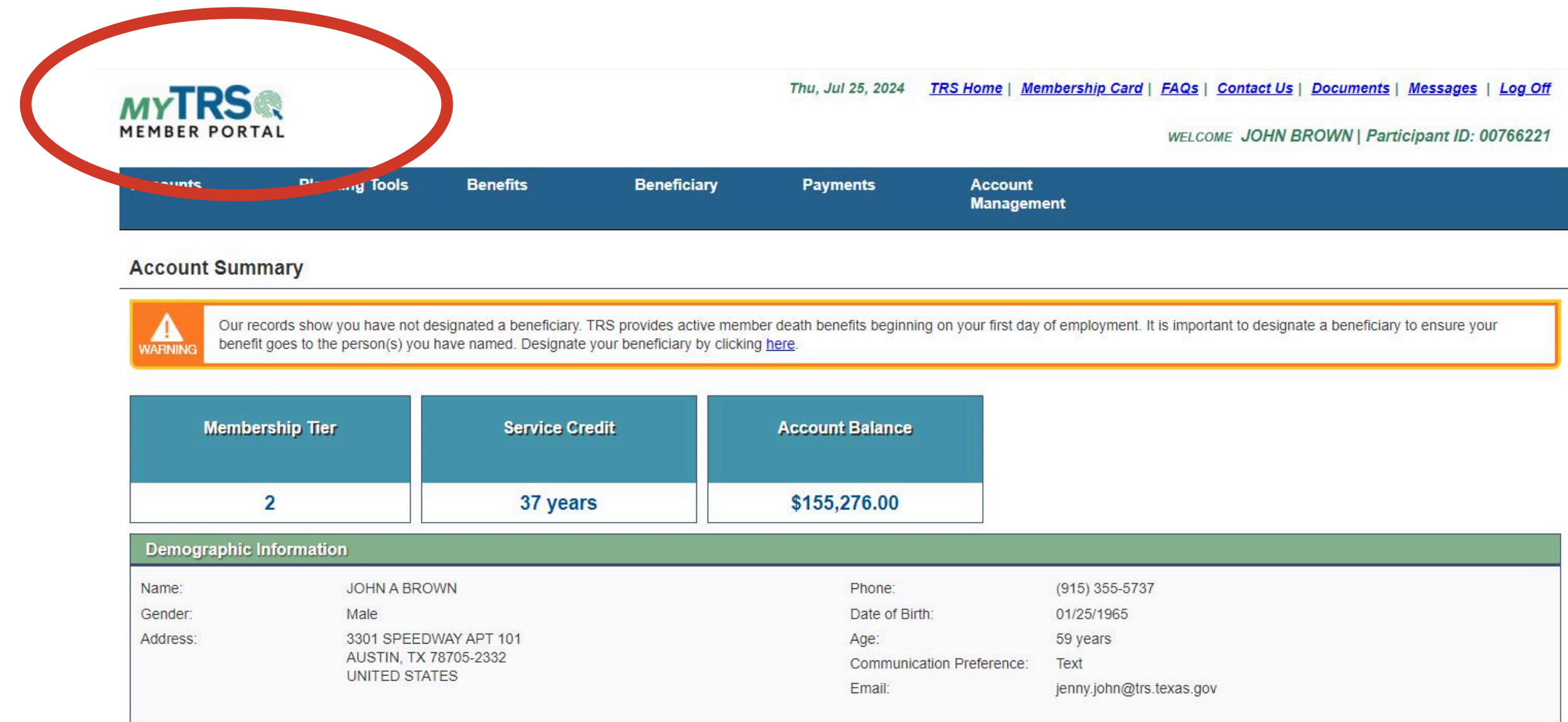
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2	37 years	\$155,276.00

Demographic Information

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Gender:	Male	Date of Birth:	01/25/1965
Address:	3301 SPEEDWAY APT 101 AUSTIN, TX 78705-2332 UNITED STATES	Age:	59 years
		Communication Preference:	Text
		Email:	jenny.john@trs.texas.gov

Hover action on the MyTRS Icon

- Make the MyTRS Icon have hover actions to indicate clickability.



myTRS MEMBER PORTAL

Thu, Jul 25, 2024 [TRS Home](#) | [Membership Card](#) | [FAQs](#) | [Contact Us](#) | [Documents](#) | [Messages](#) | [Log Off](#)

WELCOME JOHN BROWN | Participant ID: 00766221

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		Communication Preference:	Text
		Email:	jenny.john@trs.texas.gov

Consistent Language - "High Years"

- Consistent use of language - "High Years" vs "High Salaries" vs "Highest Annual Salaries"

Account Balance as of 7/25/2024		High Years*		
Non-Tax Sheltered:	\$0.00	High	Year	Salary
Tax Sheltered:	\$94,204.03	1	2023	\$66,908.00
Interest:	\$61,071.97	2	2021	\$66,872.00
Total Balance:	\$155,276.00	3	2022	\$64,926.00
		4	2020	\$58,558.00
		5	2017	\$54,398.00
		Average		\$62,332.30

Scheduled Appointments

Disability Retirement – Phone Appointment – August 15, 2024 10:00 AM
 If you would like to schedule an appointment with a TRS counselor, click here: [Schedule Appointment](#)

Disclaimers

* **High Salaries** - The salaries displayed on this page are those reported by your employer and may not have been audited or adjusted by TRS to meet the requirements for annual compensation as defined by the TRS plan terms. TRS has a duty and reserves the right to review the salaries prior to a distribution of benefits to ensure that:

- the compensation reported to TRS is creditable under the plan's terms;
- the compensation is not excluded from the annual compensation amount by any law or rule;
- the compensation is credited in the correct amount to the school year in which it was paid;
- the compensation is within the limit on increases allowed by the plan terms in the final years prior to retirement; and
- the compensation is not excluded because it was converted from non-creditable compensation to creditable compensation in the final years prior to retirement.

Highest Annual Salaries

High	Annual Salary
1	\$ 66,908.00
2	\$ 64,926.00
3	\$ 66,872.00
4	\$ 58,558.00
5	\$ 54,398.00

[Tell me more about the Service Credit & Salaries screen.](#)

Continue Back Cancel

The salary & service displayed are the current information we have on file. However th

Proximity Principle

- Wherever possible, instructions can be provided closer to the action area.
- For example - Required Fields can be left-aligned to be clearer

Benefit Calculator

The image shows a user interface for a 'Benefit Calculator'. At the top, there is a progress bar with four steps: 1. Instructions, 2. Basic Information, 3. Service Credit & Salaries, and 4. Calculation Results. Below the progress bar, there is a 'Required Fields *' label circled in red. Underneath is a 'Work with Calculator' section with a table of previous calculations.

<input type="checkbox"/>	Calculation ID	Benefit Type	Retirement Date	Beneficiary Relationship	Service Credit	Final Average Salary
<input type="checkbox"/>	890662	Service Retirement	12/31/2024	N/A	37	\$62,332.00
<input type="checkbox"/>	890662	Service Retirement	12/31/2024	N/A	37	\$62,332.00

Proximity Principle

- Wherever possible, instructions can be provided closer to the action area.
- Instructions and the “+” sign information box can be provided before the form, wherever possible.
- Alternately, we could indicate that there are instructions below or similar context.

The screenshot shows a web form with the following elements:

- Two checkboxes for pension funds: El Paso Firemen and Policemen's Pension Fund and El Paso City Employees' Pension Fund.
- A section titled "Service credit to purchase (Check all that apply)" with a list of checkboxes:
 - Previously Withdrawn Service
 - Unreported Service and/or Compensation
 - Substitute Service (requires at least 90 days of substitute service in a school year)
 - Out-of-State Service
 - Developmental Leave Service
 - Military, including USERRA Service
 - Membership Waiting Period Service
 - Work Experience by a Career or Technology Teacher
 - State Sick and/or Personal Leave Service (requires 50 days or more, or 400 hours or more of accumulated state sick and
- A field for "Retirement Date for Additional Estimate" with a date picker and the instruction "Enter Retirement Date for Additional Estimate if applicable."
- A red oval at the bottom highlights a blue link: [+ Tell me more about Request an Estimate screen.](#)
- Three buttons: "Continue", "Back", and "Cancel".

Registration - Make SSN visible while entering

- Make SSN Number visible with the “eye” icon.
- Frequently reported pain point by members as well as benefit counselors

Identify Yourself as a TRS Member

First Name *

Last Name *

SSN *

Date of Birth *

Zip Code *

Check here if you do not have an SSN on file.

Check here if you have a foreign address without a zip code.

Continue Cancel

Validate passwords as it is being entered

- Add feature to validate password as it is entered.
- Provide the rules closer to the entry fields
- Eg:

Sign Up

Username:

Username must be between 3 and 25 characters.

Email:

Password:

Password must have at least 8 characters that include at least 1 lowercase character, 1 uppercase character, 1 number, and 1 special character in (!@#\$%^&*)

Confirm Password:

Please enter the password again

Password Verification

Username:

Password:

Password must meet the following requirements:

- ✓ At least one letter
- ✗ At least one capital letter
- ✓ At least one number
- ✗ Be at least 8 characters

Security Information

Enter the activation code provided to you by TRS and then your security information.

Activation Code *

User ID *

Password *

Confirm Password *

Select a Security Question *
Who was your childhood hero?

Answer to your Security Question *

In accordance with the MyTRS Terms of Use, I certify I am JAMES WHITE and I am creating the account for my own use.

User ID/Password Rules

User ID Rules

The User ID must meet all of the following criteria:

- At least 8 characters and no more than 50 characters
- Cannot contain 7 or more numbers in total
- Cannot contain the pattern of exactly 3 numbers, followed by 2 letters, followed by 3 numbers (123ab456)
- Cannot contain a space
- Cannot use the following symbol <

Password Rules

The Password must meet all of the following criteria:

- At least 8 characters and no more than 32 characters
- At least 1 lower case letter
- At least 1 upper case letter
- At least 1 number (0-9)
- At least 1 symbol (!@#\$%^&*~-=)
- Cannot reuse any of your last 12 passwords
- Cannot use the following symbol <

Security Answer Rules

The Security Question Answer must meet all of the following criteria:

- At least 6 characters and no more than 100 characters
- Must not contain any part of the Security Question
- Cannot use the following symbol <

Make Password visible and improve security questions validation process

Password

Inability to view password while typing causes frustration, particularly for older members

Recommendation:

Username

Password



Passwords must contain:

- Between 8 and 20 characters
- Contain at least (3) of the (4) following character types:
 - Lowercase alphanumeric
 - Uppercase alphanumeric
 - Numeric
 - Only dash - and underscore _ special characters are allowed
- Not contain (3) or more repeating (identical or consecutive) characters

Security questions

Requirements not transparent (e.g., asks for favorite color but answer must be greater than 6 characters)

Recommendation: provide contextual information describing answer criteria

Security question 1:

Security answer 1:

Upload Member Forms and Documents

This feature could also be provided within MyTRS in addition to featuring it more prominently on the TRS Website.

[Upload Member Form](#)

Tue, Jul 2, 2024 [TRS Home](#) | [Membership Card](#) | [FAQs](#) | [Contact Us](#) | [Documents](#) | [Messages](#) | [Log Off](#)

WELCOME JOHN BROWN | Participant ID: 00766221

Accounts Planning Tools Benefits Beneficiary Payments Account Management

Account Summary

WARNING Our records show you have not designated a beneficiary. TRS provides active member death benefits beginning on your first day of employment. It is important to designate a beneficiary to ensure your benefit goes to the person(s) you have named. Designate your beneficiary by clicking [here](#).

Membership Tier	Service Credit	Account Balance
2	37 years	\$155,276.00

Demographic Information

Name:	JOHN A BROWN	Phone:	(123) 456-7890
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Upload Member Forms and Documents

TRS now allows member related forms and documents to be securely uploaded for processing in lieu of mailing and faxing.

TRS will accept the following document types: PDF, PNG, JPEG and JPG (up to 10 MB for each file)

First and Last Name:*

Your Email:*

Phone number:*

Either Participant ID or SSN is required. If SSN is provided, please include dashes (example 111-11-1111). If the forms being uploaded are related to a death claim, please enter the Participant ID or SSN of the deceased TRS member.

Participant ID:

SSN:

Comments:


TRS will accept these document types: PDF, PNG, JPEG and JPG (up to 10 MB for each file)

Upload File:*
 No file chosen

Upload File:
 No file chosen

Upload File:
 No file chosen

Captcha:

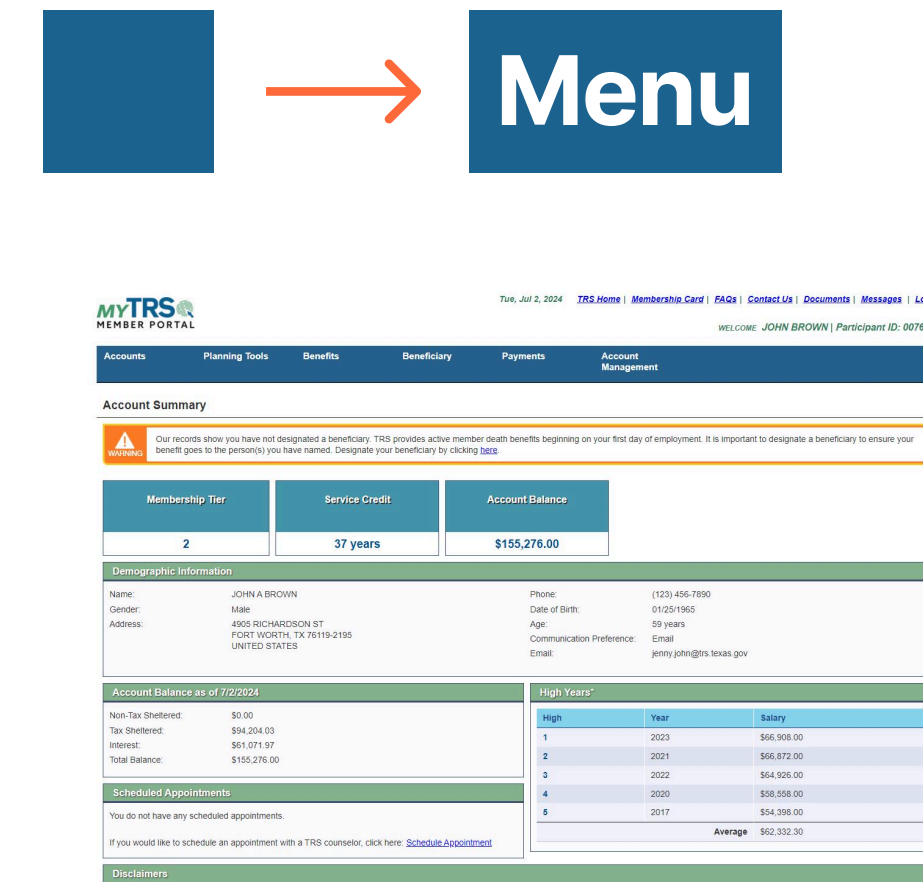
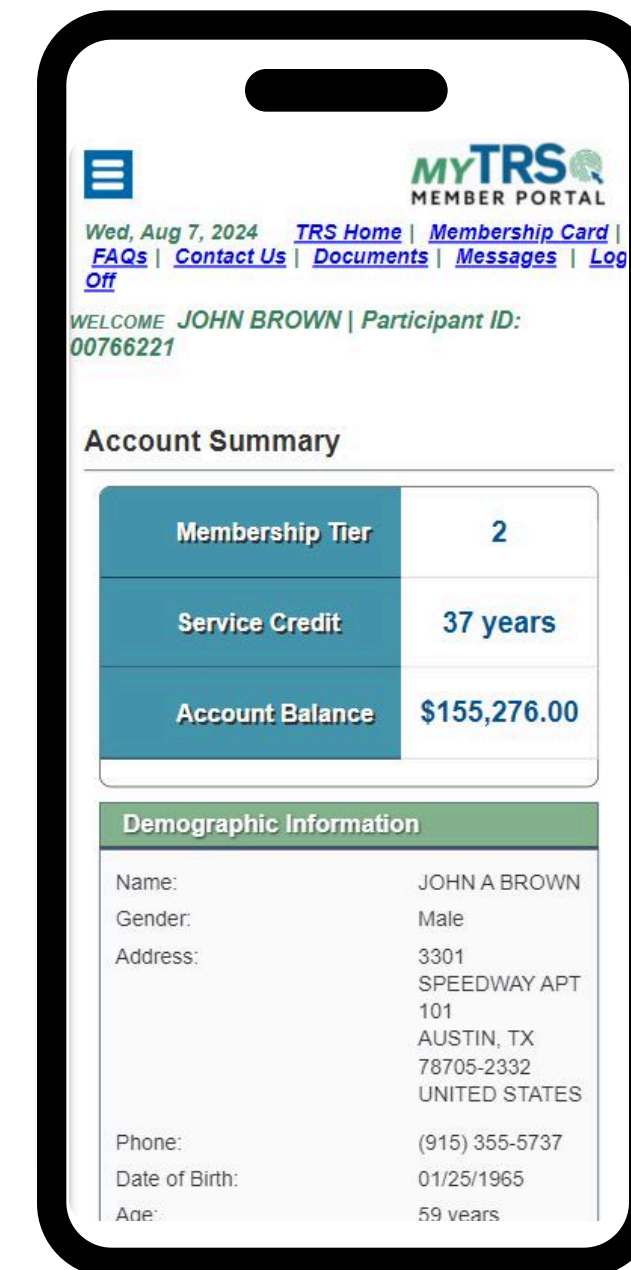
I'm not a robot  reCAPTCHA
Privacy - Terms

Mobile access

Lack of consistency between mobile and desktop browser versions - many members don't have a desktop computer

Recommendation: Hide less under hamburger menu in mobile

Change the hamburger menu title to "menu"



Improve the back button functionality

The back button is a frequent pain point for members. Instinctively, many of them use it, resulting in hung screens and broken workslows.

Recommendations:

- Feature a warning to not use the Browser Back Button more prominently across the portal.
- Alternatively, for key flow, we could move the back button to a more recognizable place such as the top of the workflow screen, to align with member expectations

Accounts Planning Tools Benefits Beneficiary Payments Account Management

Benefit Calculator

1 Instructions → 2 Basic Information → 3 Service Credit & Salaries → 4 Calculation Results

Required Fields *

Service Credit

Years of Service Credit * 40

State Sick and/or Personal Leave * No Yes

Are you interested in seeing the estimated cost to purchase a year of state sick and/or personal leave?

Highest Annual Salaries

High	Annual Salary
1	\$ 66,908.00
2	\$ 64,926.00
3	\$ 66,872.00
4	\$ 58,558.00
5	\$ 54,398.00

[Tell me more about the Service Credit & Salaries screen.](#)

Continue Back Cancel

The salary & service displayed are the current information we have on file. However they are subject to change due to additional submissions by your employer, and/or audit by TRS.

Cancel login.microsoftonline.com

Microsoft

Enter password

Password

Forgot my password

Sign in with another account

Sign in

12 settembre 2017 12:08 Laura Marconi

Mediatria

Gestione utenti

Cucina e Bar... Magazzino Me... Trasporto Me...

Manuale: Cucina e Bar didattico Mediatria Academy + Collega utente

Laura Marconi Modifica

PROCEDURE ZONE

Conservazione e controllo temperature 2.001 - Cucina

Verifica di strutture e attrezzature 2.003 - Magazzino

Approvvigionamento - Lavorazione - Trasformazione

Marco Rossi Modifica

PROCEDURE ZONE

Verifiche ripetitive interne, revisioni periodiche dei documenti e analisi su alimenti - Ambienti di lavoro 2.001 - Cucina

Conservazione e controllo temperature 2.003 - Magazzino

Verifica degli infestanti

Verifica del personale

Verifica di strutture e attrezzature

Verifica delle pulizie

localhost

Sign In

Hello! Sign in with your username or email

Email address

hello@example.com

Password

Remember me Forgot Password?

SIGN IN

Don't have an account? Sign Up

Task-based recommendations

Apply for Retirement	04
Schedule Appointment	05
Benefit Calculator	05
Update Preferred Mode of Communication	05
Update Address	05
Update Phone Number	05
Request an Estimate	05
View Membership Card	05

Apply for Retirement

PURE Rating: 17

Sub-steps

1. Select Benefits > Apply for Retirement
2. Create New Application (Service/disability) and Accept E-signature Disclosure and Data Privacy Notice
3. Enter Retirement Date
4. Choose Annuity Payment Plan
5. Update Tax Withholding
6. Generate and Sign Document
7. Review Status

Design findings

? Call-To-Action Buttons unclear/ not prominent

- “Adding New Service Retirement Application” button looks like a hyperlink.
- Back button is embedded in information box. It looks associated with “Tell me more about Retirement Applications” section

Apply For Retirement

Service Retirement Applications

[Add New Service Retirement Application](#)

ID	Start Date	Retirement Date
34848	07/19/2024	12/31/2024
34831	07/16/2024	08/31/2024
34830	07/16/2024	07/31/2024

Disability Retirement Applications

ID	Start Date	Retirement Date
34849	07/19/2024	12/31/2024
34832	07/16/2024	08/31/2024

[+ Tell me more about Retirement Applications](#)

Back

Design Recommendations

💡 Clarify what Replace Application means

- We provide replace as an option without sufficient context to clarify when or how it can be used.
- It could be made clearer as to whether replacing entails creating a new application. If yes, how many times can one replace the application?

The screenshot shows the MyTRS Member Portal interface. A modal dialog box is open, displaying a message from qat5ss.mytrs.texas.gov. The message states: "Your current retirement application will not be replaced until you have submitted a new retirement application to TRS. You must complete and sign the new retirement application by 1:00 AM CT or your new retirement application will be deleted." The dialog has "OK" and "Cancel" buttons.

Below the dialog, the "Apply For Retirement" section is visible, featuring a table titled "Service Retirement Applications".

ID	Start Date	Retirement Date	Date Submitted	Application Status	Actions
34872	07/25/2024	12/31/2024	07/25/2024	Submitted	View Replace Cancel
34858	07/24/2024	07/31/2025	07/24/2024	Canceled	View
34848	07/19/2024	12/31/2024	07/19/2024	Canceled	View
34831	07/16/2024	08/31/2024	07/16/2024	Canceled	View
34830	07/16/2024	07/31/2024	07/16/2024	Canceled	View

Design Recommendations

💡 Document Center documents organization / naming

- Documents do not follow the same order as in the eSign screen which could lead to confusion .
 - Eg: In e-Sign, we fill out in the order - application > designate > withholding. The documents are presented in reverse order in the documents center.
- Could organize the documents better to ease comprehension and retrieval. We could also group them by application or provide filter options here.

The screenshot shows the MYTRS Member Portal interface. At the top, there is a navigation bar with links for [TR Home](#), [Membership Card](#), [FAQs](#), [Contact Us](#), [Documents](#), [Messages](#), and [Log Out](#). The date is displayed as Thu, Jul 25, 2024. A welcome message reads: WELCOME JOHN BROWN | Participant ID: 0076622.

The main navigation menu includes: Accounts, Planning Tools, Benefits, Beneficiary, Payments, and Account Management.

The Document Center section contains a message: "If you would like to open a document, please ensure that your pop-up blocker is disabled." Below this, there are filter options: "Display" with radio buttons for "All" (selected) and "Current Year".

Document	Generated On
Designation of Beneficiary form (TRS15ES)	07/24/2024
Application for Service Retirement form (TRS30ES)	07/24/2024
Withholding Certificate for Periodic Pension or Annuity Payments (TR W4PES)	07/19/2024
Designation of Beneficiary form (TRS15ES)	07/19/2024
Application for Service Retirement form (TRS30ES)	07/19/2024
Account Balance Form (TRS547)	07/18/2024
Verification of Postal Service Address Change (TRSL5541)	07/16/2024
Account Balance Form (TRS547)	06/27/2024

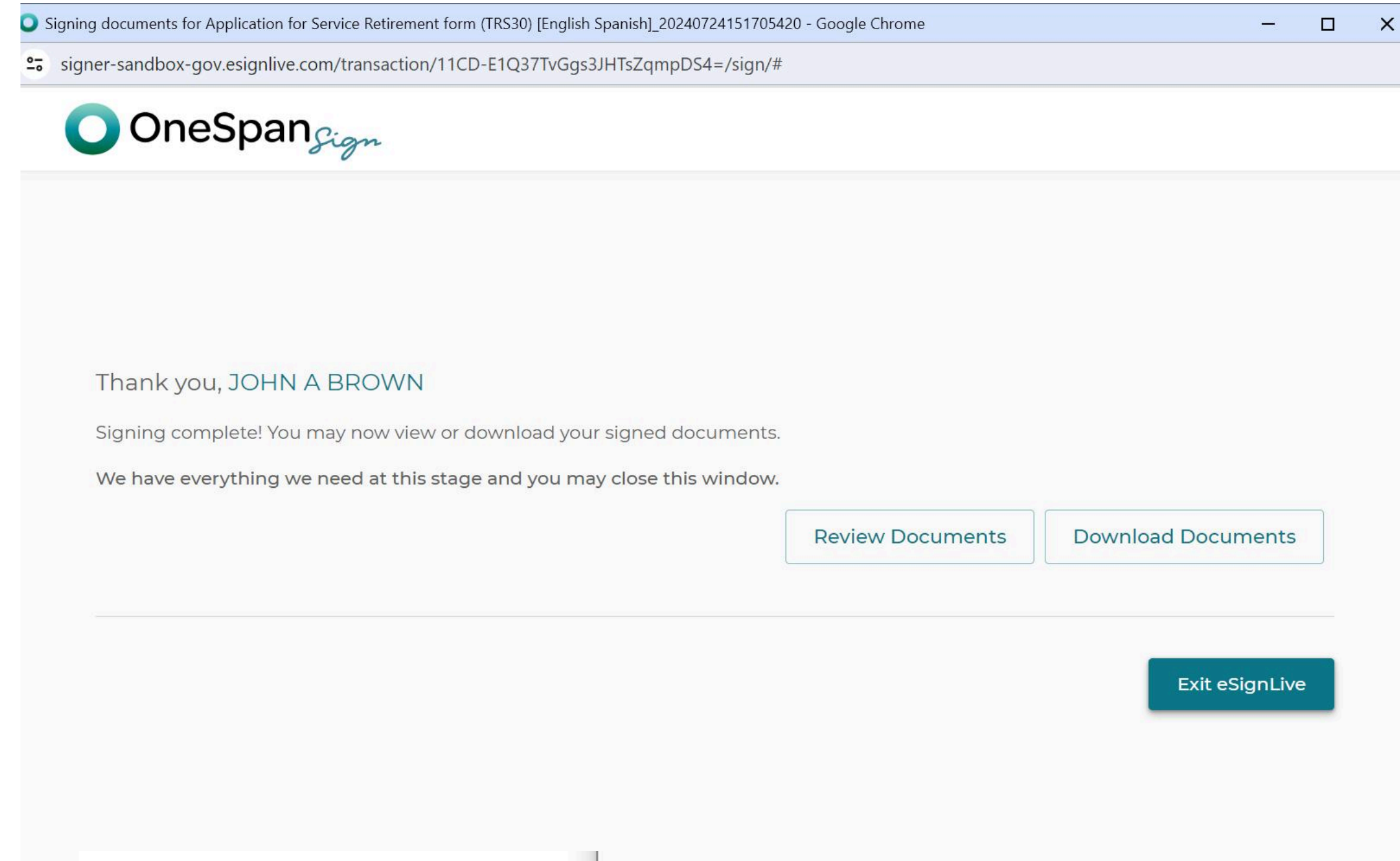
A red circle highlights the first three rows of the document list.

At the bottom of the document list, there is a "Cancel" button.

Workflow findings

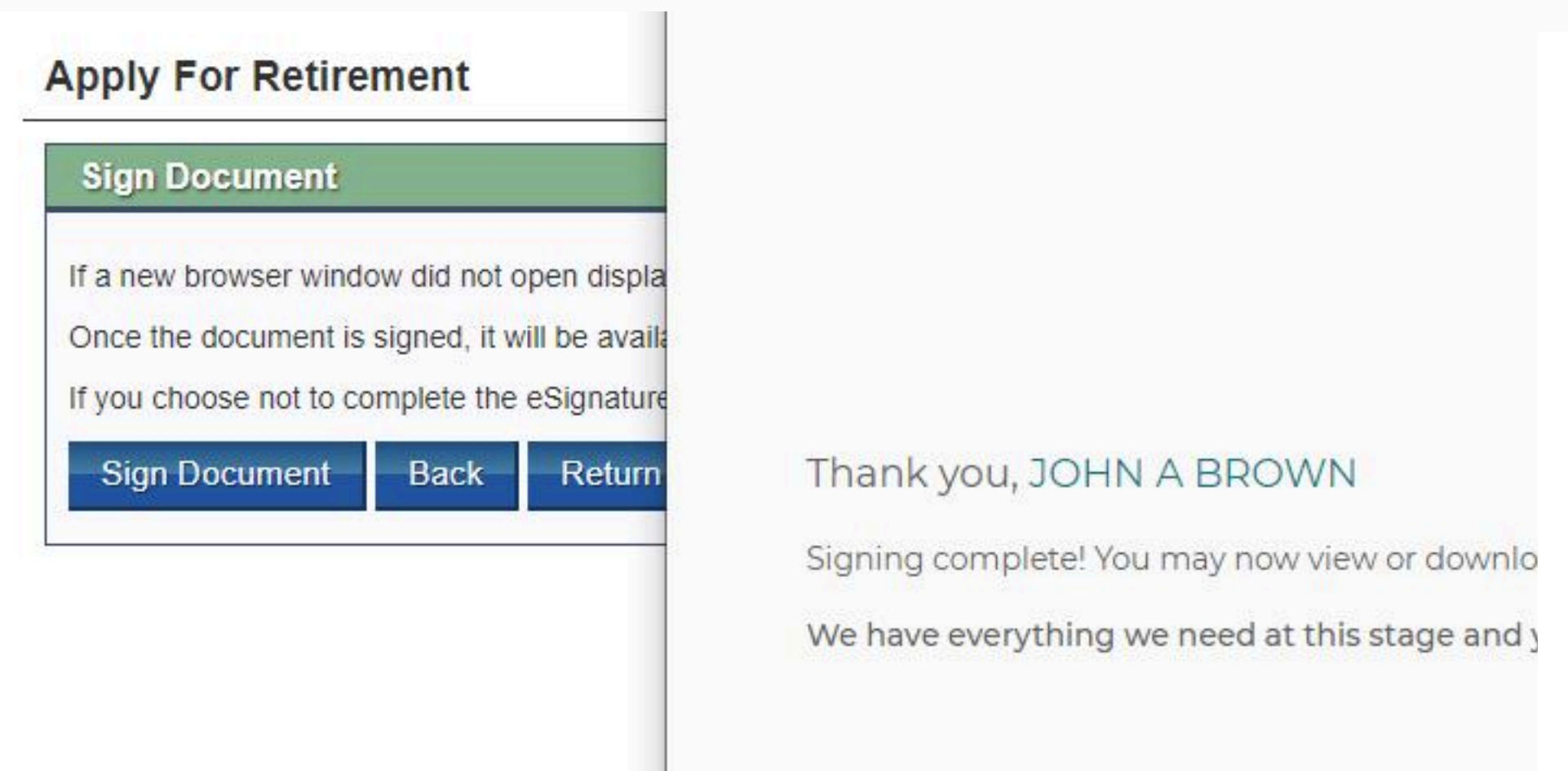
? “Exit eSignLive” directs to TRS website

- When eSignature is done, clicking “Exit eSignLive” doesn’t close the OneSpan pop-up window nor goes back to the MyTRS portal. But it directs users to the main TRS website, and it is confusing since there is no steps required to be done in the main website.



💡 Close the tab automatically

- Close the tab automatically and display the “Sign Document” button in inactive state (gray out).
- Add hyperlink to go straight to Documents page under Account Management.



Workflow findings

? Information flow and Continue button

- Clicking “Continue” button at the bottom on step 3, Beneficiary Designation” takes you to the same page with another field to add alternative beneficiary. It confuses user as it seems like “Continue” button resulted in no action and doesn’t move to next step.
- Seems like the Screen changed from Joint and Survivor Benefits to Death Benefits but it was not clear as a user.

The image displays two screenshots of a web application workflow, connected by a large red arrow pointing downwards. The top screenshot shows the 'Beneficiary Designation for Joint and Survivor Benefits' screen. It features a progress bar at the top with five steps: 1. Retirement Date, 2. Payment Plan, 3. Beneficiary Designation (highlighted), 4. Tax Withholding, and 5. Generate and Sign Document. Below the progress bar, there is a text block: 'Based on your selected payment option, we need information regarding your designated beneficiary(ies) for joint and survivor annuities.' The main content area is titled 'Beneficiary Designation for Joint and Survivor Benefits' and contains a section for 'Option 1' with a description: 'A reduced annuity payable throughout my life with the provision that, upon my death the reduced annuity will be paid to the person designated on the reverse side as my primary beneficiary. If my designated beneficiary predeceases me, the annuity will be paid to the Standard Annuity amount.' Below this is a table for 'Primary Beneficiary Designation Details' with columns: Relationship, SSN/EIN, Beneficiary Name, and Date of Birth. The table contains one entry: Child, Jojo DJ, 07/07/1964. At the bottom, there is a link 'Tell me more about Beneficiary Designation' and three buttons: Continue, Back, and Cancel. The bottom screenshot shows the 'Beneficiary Designation for Death Benefits' screen. It has the same progress bar at the top. The text block reads: 'Please take a moment to review and update your primary and alternate beneficiary(ies) for death benefits. If you would like to add a new beneficiary link for the appropriate panel. If you need to edit information for a beneficiary select the edit link, if you need to delete a beneficiary select the delete link.' The main content area is titled 'Beneficiary Designation for Death Benefits' and contains a section for 'Beneficiary Type' with the value 'Death Benefit'. Below this is a table for 'Primary Beneficiary Designation Details' with columns: Relationship, SSN/EIN, Beneficiary Name, and Date of Birth. The table contains one entry: Child, Jojo DJ, 07/07/1964. At the bottom, there is a link 'Add New Beneficiary' and a table for 'Alternate Beneficiary Designation Details' with columns: Relationship, SSN/EIN, Beneficiary Name, and Date of Birth. A large red arrow points from the 'Continue' button in the top screenshot to the 'Add New Beneficiary' link in the bottom screenshot, indicating the user's path.

1 Retirement Date → 2 Payment Plan → 3 Beneficiary Designation → 4 Tax Withholding → 5 Generate and Sign Document

Based on your selected payment option, we need information regarding your designated beneficiary(ies) for joint and survivor annuities.

Beneficiary Designation for Joint and Survivor Benefits

Option 1 A reduced annuity payable throughout my life with the provision that, upon my death the reduced annuity will be paid to the person designated on the reverse side as my primary beneficiary. If my designated beneficiary predeceases me, the annuity will be paid to the Standard Annuity amount.

Primary Beneficiary Designation Details

Relationship	SSN/EIN	Beneficiary Name	Date of Birth
Child		Jojo DJ	07/07/1964

[Tell me more about Beneficiary Designation](#)

Continue Back Cancel

1 Retirement Date → 2 Payment Plan → 3 Beneficiary Designation → 4 Tax Withholding → 5 Generate and Sign Document

Please take a moment to review and update your primary and alternate beneficiary(ies) for death benefits. If you would like to add a new beneficiary link for the appropriate panel. If you need to edit information for a beneficiary select the edit link, if you need to delete a beneficiary select the delete link.

Beneficiary Designation for Death Benefits

Beneficiary Type Death Benefit

Primary Beneficiary Designation Details

[Add New Beneficiary](#)

Relationship	SSN/EIN	Beneficiary Name	Date of Birth
Child		Jojo DJ	07/07/1964

Alternate Beneficiary Designation Details

[Add New Beneficiary](#)

Relationship	SSN/EIN	Beneficiary Name	Date of Birth
--------------	---------	------------------	---------------

Content findings

? Clearer Error Message

- Error message doesn't explain how to resolve the issue and doesn't highlight which input field is throwing an error.
- To fix the error according to the option selected, user needs to click "Back" button twice to go to previous screens and look for "Tell me more about Payment Plans", which provides age restriction rules.

Apply For Retirement

ERROR The Retirement Option you chose is not valid based on the Adjusted Age Difference of the Beneficiary.

1 Retirement Date → 2 Payment Plan → 3 Beneficiary Designation → 4 Tax Withholding → 5 Generate and Sign Document

Primary Beneficiary Designation Details

Based on your selected payment option, we need information regarding your joint and survivor benefits. Please provide the

Option	Option 1
Relationship *	Child
SSN	
First Name *	Jojo
Middle Name	
Last Name *	DJ
Date of Birth *	07/07/1964

[Tell me more about Payment Plans](#)

When you retire, if you wish to designate a beneficiary who is younger than you are, then

- you are not eligible to select Option One if you designate a non-spouse beneficiary with an adjusted age difference of more than 10 years, and
- you are not eligible to select Option Five if you designate a non-spouse beneficiary with an adjusted age difference of more than 19 years.

The adjusted age difference is calculated as follows:

Calculation for Adjusted Age Difference

1. Age 70 - Member age at retirement = allowable adjustment to actual age difference
2. Members age at retirement - beneficiary's age as of retirement date = actual age difference between member and beneficiary
3. Actual age difference between member and beneficiary - allowable adjustment = adjusted age difference for option eligibility.

Option Three is not available to a member retiring at age 104 or older.

Option Four is not available to a member retiring at age 93 or older.

Content Recommendations

💡 Add more information to view details

- If beneficiary is being processed, there is very little contextual information provided to indicate that.
- It might be useful to list the documents/retirement packet associated with this application in the details
- We could expand OPT1 / OPT 3 to Option 1, Option 3 for Clarity

Apply For Retirement

View Application	
Retirement Date	7/31/25
Retirement Type	Service
Retirement Plan	OPT1
Retirement Benefit Primary Beneficiary(ies)	Jojo DJ (Child)
Retirement Benefit Alternate Beneficiary(ies)	
Death Benefit Primary Beneficiary(ies)	Jojo DJ (Child)
Death Benefit Alternate Beneficiary(ies)	

[Back](#) [Return to Home Page](#)

Apply For Retirement

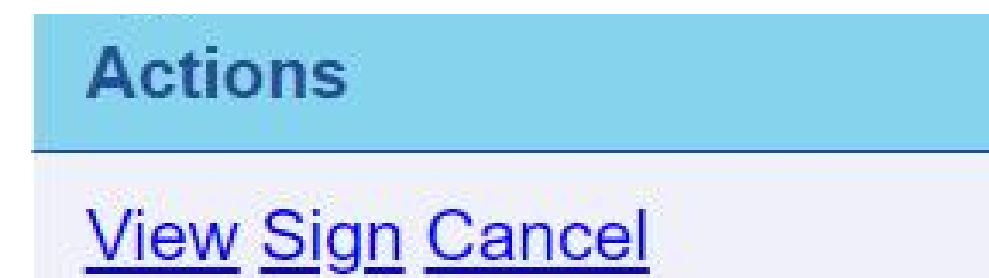
View Application	
Retirement Date	12/31/24
Retirement Type	Disability
Retirement Plan	OPT3
Retirement Benefit Primary Beneficiary(ies)	
Retirement Benefit Alternate Beneficiary(ies)	
Death Benefit Primary Beneficiary(ies)	
Death Benefit Alternate Beneficiary(ies)	

[Back](#) [Return to Home Page](#)

Label findings

? Unclear Titles & Buttons

- Top navigation title, Benefits, does not encompass subpage titles; Apply for Refund and Retirement.
- Cancel action is not clear for “Apply for Retirement.”



- Refund & Retirement
- Benefit Applications
- Benefit Services
- Benefit Requests
- Benefit Actions
- Benefit Forms

- Withdraw

Schedule Appointment

PURE Rating: 11

Sub-steps

1. Select Planning Tools > Schedule Appointments
2. Select Schedule a New Appointment > Choose Reason > Continue
3. Select/Create Estimate Request (Service/ Disability Retirement Only)
4. Provide Additional Information (Service/Disability Retirement Only)
5. Schedule Appointment
6. Confirm Appointment
7. View/Cancel Appointment

Design Recommendations

💡 Create an estimate screen - Eliminate Radio button

- There is a radio button here which seems confusing. Eliminate it for clarity.
- Also seems to imply that you may be able to choose an existing Request for Estimate

To schedule an appointment please complete the following Request for Estimate Retirement information. This will allow TRS to help you to determine which retirement option is best for you.

Note: Retirement estimates are not binding on TRS and are subject to audit, adjustment, and correction.

Please keep in mind when scheduling an appointment, it can take 10-14 business days to receive a retirement packet.

Select Estimate Request

Create a New Estimate Request

Appointment Reason	Service Retirement
Retirement Date *	<input type="text"/> <input type="calendar"/>
Are you currently working in a TRS-covered position? *	<input type="radio"/> Yes <input type="radio"/> No

If multiple retirement dates, enter Retirement Date for Additional Estimate below.

Design Recommendations

💡 “Title of Recent Position”

- This field could be a drop-down list (with an “Other” option) instead of Input box to provide additional flexibility.

💡 Schedule Appointment CTA

- The Cancel Button is more prominent than the “Schedule Appointment” CTA

Please keep in mind when scheduling an appointment, it can take 10-14 business days to receive a retirement packet.

Select Estimate Request

Create a New Estimate Request

Appointment Reason	Service Retirement
Retirement Date *	<input type="text" value="December 2024"/> <small>If multiple retirement dates, enter Retirement Date for Additional Estimate below.</small>
Are you currently working in a TRS-covered position? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Title of Most Recent Position	<input type="text"/>
Number of Days per Contract/Year	<input type="text"/>

Scheduled Appointments

If you have questions or need assistance, no need to travel to Austin or schedule an appointment Monday - Friday through Friday from 7 a.m. to 6 p.m.

To schedule an appointment, TRS must have a valid email address and phone number.

Below is the email address TRS has on record. You can update your email address here. [Update Email](#)

jenny.john@trs.texas.gov

Below is the phone number(s) TRS has on record. You can update your phone number here. [Update Ph](#)

(800) 223-8778
(915) 355-5737

[Schedule a New Appointment](#)

Appointment Date	Appointment Time	Location
Thursday, August 15, 2024	10:00 AM – 10:30 AM	Phone Appointment

Content improvement findings

? Schedule Appointment Screen

- There is no upfront information about “Phone” being an available session type option.
- Duration of Phone Appointment can also be made clearer.
- The previous screen where number of guests are selected seems confusing if member were to select Phone Appointment

Create Appointment



Schedule Appointment

Appointment Reason	Service Retirement
Session Type *	Phone ▾
Phone*	<p>These are current phone numbers TRS has for you on file. If they are not up to date, please update your information through clicking this link.</p> <p><input type="radio"/> Home : (800) 223-8778</p> <p><input type="radio"/> Cell : (915) 355-5737</p> <p><input type="radio"/> Other : <input type="text"/></p>

Content Improvement recommendations

💡 Add additional details about the duration of the appointment

- The duration of different appointments vary and it would be beneficial to have that information.

Create Appointment

- 1 Choose Your Reason
- 2 Select Estimate Request
- 3 Additional Information
- 4 Schedule Appointment
- 5 Confirm Appointment

Additional Information

Appointment Reason	Service Retirement
Number Of Guests *	0 ▾ You are welcome to bring a guest. However, if the guest is a TRS member and wants to discuss their benefits, that individual mu
Language Preference*	English ▾
Special Accommodations (i.e. language translator, hearing impaired, wheelchair, etc.)	<input type="text"/> (You have 100 characters remaining.)

[Continue](#) [Back](#) [Cancel](#)

Workflow findings

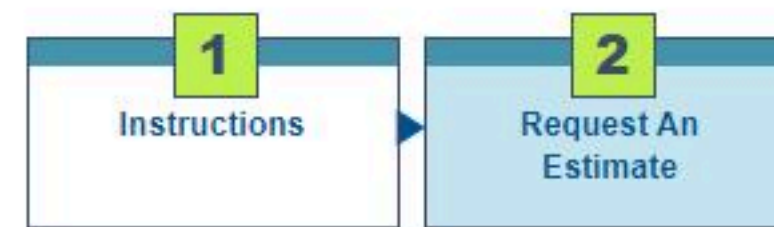
? Can Request an Estimate more than once

We mention frequently (within Benefit Calculator, Request an Estimate and in Schedule an Appointment tasks) that only one estimate can be created for each retirement type.

But Scheduling an Appointment allows members to create additional estimates, which shows up in the Request an Estimate screen.

💡 Change content or workflow to match our processes

Request An Estimate



Request An Estimate Instructions

[View a Previous Estimate Request](#)

Request ID	Benefit Type	Submitted On	Beneficiary Relationship
890675	Service Retirement	07/24/2024	
890658	Disability Retirement	07/18/2024	
890657	Service Retirement	07/18/2024	
890656	Service Retirement	07/17/2024	Former Spouse
890643	Disability Retirement	07/16/2024	Child

Create Appointment



To schedule an appointment please complete the following Request for Estimate Retirement information. This will allow TRS to help you to decide

Note: Retirement estimates are not binding on TRS and are subject to audit, adjustment, and correction.

Please keep in mind when scheduling an appointment, it can take 10-14 business days to receive a retirement packet.

Select Estimate Request

Create a New Estimate Request

Appointment Reason Service Retirement

Retirement Date *

If multiple retirement dates, enter Retirement Date for Additional Estimate below.

Are you currently Yes No

Workflow findings

? Modify order of selecting number of guests

- There are certain appointments which could have more than one guest by nature (such as a phone appointment or video call)
- Asking this question may not be applicable in certain cases.
- Accommodations may differ based on appointment type as well.

💡 Modify sequence to ask this question after member selects appointment type.

MYTRS
MEMBER PORTAL

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WELCOME JOHN BROWN | Participa

Accounts Planning Tools Benefits Beneficiary Payments Account Management

Create Appointment

- 1 Choose Your Reason
- 2 Select Estimate Request
- 3 Additional Information
- 4 Schedule Appointment
- 5 Confirm Appointment

Additional Information

Appointment Reason	Service Retirement
Number Of Guests *	0 <small>You are welcome to bring a guest. However, if the guest is a TRS member and wants to discuss their benefits, that individual must schedule a separate appointment.</small>
Language Preference*	English
Special Accommodations (i.e. language translator, hearing impaired, wheelchair, etc.)	<input type="text"/> <small>(You have 100 characters remaining.)</small>

Continue Back Cancel

Content Improvement recommendations

💡 Provide contextual information

- Number of Guests - Need clarity on if only one guest is allowed. If so, Yes or No would make more sense as options - “Do you want to bring a guest”?

Create Appointment

- 1 Choose Your Reason
- 2 Select Estimate Request
- 3 Additional Information
- 4 Schedule Appointment
- 5 Confirm Appointment

Additional Information

Appointment Reason	Service Retirement
Number Of Guests *	0 ▾ You are welcome to bring a guest. However, if the guest is a TRS member and wants to discuss their benefits, that individual must schedule
Language Preference*	English ▾
Special Accommodations (i.e. language translator, hearing impaired, wheelchair, etc.)	<input type="text"/> (You have 100 characters remaining.)

Continue Back Cancel

- Retirement Packet - Clarity on who sends the Retirement Packet, and how.

Create Appointment

- 1 Choose Your Reason
- 2 Select Estimate Request
- 3 Additional Information
- 4 Schedule Appointment
- 5 Confirm Appointment

To schedule an appointment please complete the following Request for Estimate Retirement information. This will allow TRS to h

Note: Retirement estimates are not binding on TRS and are subject to audit, adjustment, and correction.

Please keep in mind when scheduling an appointment, it can take 10-14 business days to **receive a retirement packet.**

Workflow recommendations

💡 Flexibility in editing appointment

- We could include more options to manage appointment - such as reschedule, change a phone number, etc.

Scheduled Appointments

If you have questions or need assistance, no need to travel to Austin or schedule an appointment, you can call and speak to one of our Benefit Counselors at 800-223-8778, Monday - Friday through Friday from 7 a.m. to 6 p.m.

To schedule an appointment, TRS must have a valid email address and phone number.

Below is the email address TRS has on record. You can update your email address here. [Update Email](#)

jenny.john@trs.texas.gov

Below is the phone number(s) TRS has on record. You can update your phone number here. [Update Phone](#)

(800) 223-8778
(915) 355-5737

[Schedule a New Appointment](#)

Appointment Date	Appointment Time	Location	Reason	Details	Cancel
Thursday, August 15, 2024	10:00 AM – 10:30 AM	Phone Appointment	Disability Retirement	View Details	Cancel

[Cancel](#)

Benefit Calculator

PURE Rating: 11

Sub-steps

1. Select Planning Tools > Click Benefit Calculator > View Page
2. Put Basic Info and Beneficiary Info > Read “+” Sign
3. Fill Service Credit > View/ Change Annual Salary > Read “+” Sign
4. Read Calculation Results
5. Save the Calculation
6. Click Calculation ID to view previous calculations
7. Delete your calculation

Design Recommendations

💡 Button placement

- Continue button on far left is mis-clicked, thinking it's Back button.
- Ideally cancel button is rarely used. So best way to place buttons are:
 1. Move back button to top left (or keep it bottom far left)
 2. Place cancel button on the left and continue button on the right (if we are keeping back button at the bottom, place cancel and continue button on bottom far right)

The screenshot shows a table titled "Highest Annual Salaries" with two columns: "High" and "Annual Salary". The table contains five rows of data. Below the table, there is a link "Tell me more about the Service Credit & Salaries screen." and three buttons: "Continue", "Back", and "Cancel". A red oval highlights the "Continue", "Back", and "Cancel" buttons, indicating a design issue where the "Continue" button is on the far left, which is mis-clicked as a "Back" button.

High	Annual Salary
1	\$ 66,908.00
2	\$ 64,926.00
3	\$ 66,872.00
4	\$ 58,558.00
5	\$ 54,398.00

[Tell me more about the Service Credit & Salaries screen.](#)

Continue Back Cancel

The salary & service displayed are the current information we have on file. However th

The image compares two dialog boxes for "Get This Reward" (Purchase with 2,500 points?). The left dialog box is labeled "cool color" and has a "Cancel" button on the left and a "Purchase" button on the right. Below it is a red "X" icon and the text "Is Cancel an action?". The right dialog box is labeled "neutral color" and has a "Cancel" button on the left and a "Purchase" button on the right. Below it is a green checkmark icon and the text "Cancel is not an action".

cool color

neutral color

Get This Reward

Purchase with 2,500 points?

Cancel Purchase

Cancel Purchase

✗ Is Cancel an action?

✓ Cancel is not an action

Content findings

💡 Inconsistent Order of High Salaries

- Highest Annual Salaries in Benefit Calculator is populated based on the timeline (year), but the High Years in homepage (Account Summary) is populated based on highest salary order. The order of high salaries can be consistent throughout each page.

Highest Annual Salaries	
High	Annual Salary
1	\$ 66,908.00
2	\$ 64,926.00
3	\$ 66,872.00
4	\$ 58,558.00
5	\$ 54,398.00

[Tell me more about the Service Credit & Salaries screen.](#)

[Continue](#) [Back](#) [Cancel](#)

The salary & service displayed are the current information we have on file. However th

High Years*		
High	Year	Salary
1	2023	\$66,908.00
2	2021	\$66,872.00
3	2022	\$64,926.00
4	2020	\$58,558.00
5	2017	\$54,398.00
Average		\$62,332.30

Content findings

💡 Logical option selection

- 'Multiple Beneficiaries' have yes and no option. But there are no specific instruction to people who have no beneficiary. We can clarify that in information box and have N/A option.
- Why does Trust (beneficiary relationship) require beneficiary date of birth and gender when Organization doesn't require them? Do we need the gender at all?

The image shows a 'Beneficiary Information' form with several fields. Red circles highlight the following areas:

- The 'Multiple Beneficiaries *' field with radio buttons for 'Yes' and 'No'.
- The 'Beneficiary Relationship' dropdown menu showing 'Trust' selected.
- The 'Beneficiary Date of Birth' field with a calendar icon.
- The 'Beneficiary Gender' dropdown menu.
- The 'Multiple Beneficiaries *' field with radio buttons for 'Yes' and 'No'.
- The 'Beneficiary Relationship' dropdown menu showing 'Organization' selected.
- The 'Beneficiary Date of Birth' field with a calendar icon.
- The 'Beneficiary Gender' dropdown menu.
- The instruction: 'If naming multiple beneficiaries at retirement, select "Yes" for Multiple Beneficiaries; otherwise, leave "No" selected'.

Beneficiary Information

Whom do you plan to name as beneficiary?

Multiple Beneficiaries * Yes No

Beneficiary Relationship

Beneficiary Date of Birth

Beneficiary Gender

Beneficiary Information

Whom do you plan to name as beneficiary?

Multiple Beneficiaries * Yes No

Beneficiary Relationship

Beneficiary Date of Birth

Beneficiary Gender

[Tell me more about the Basic Information screen.](#)

Click the calendar icon to select the as of date you would like to calculate your active member benefits.

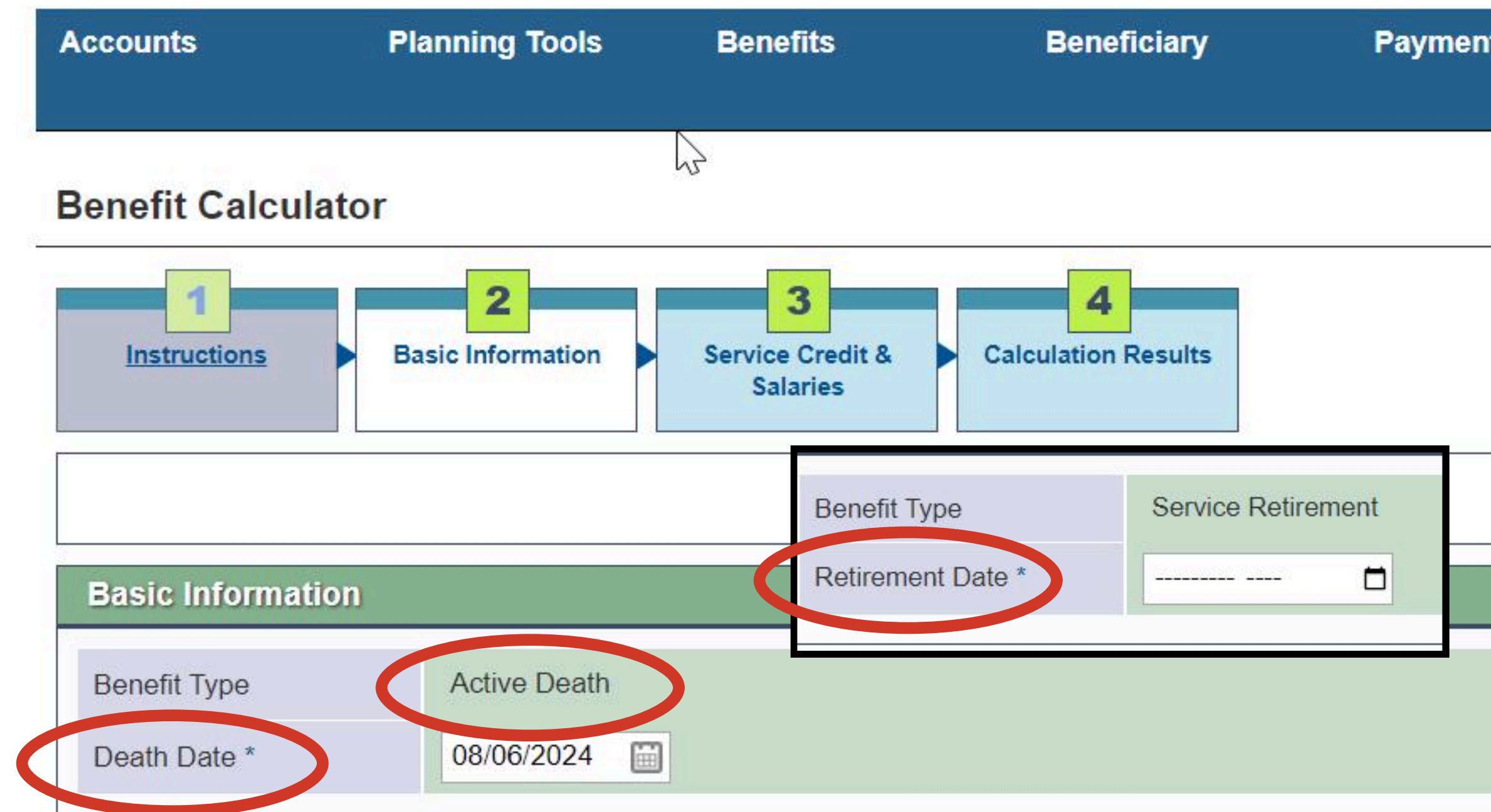
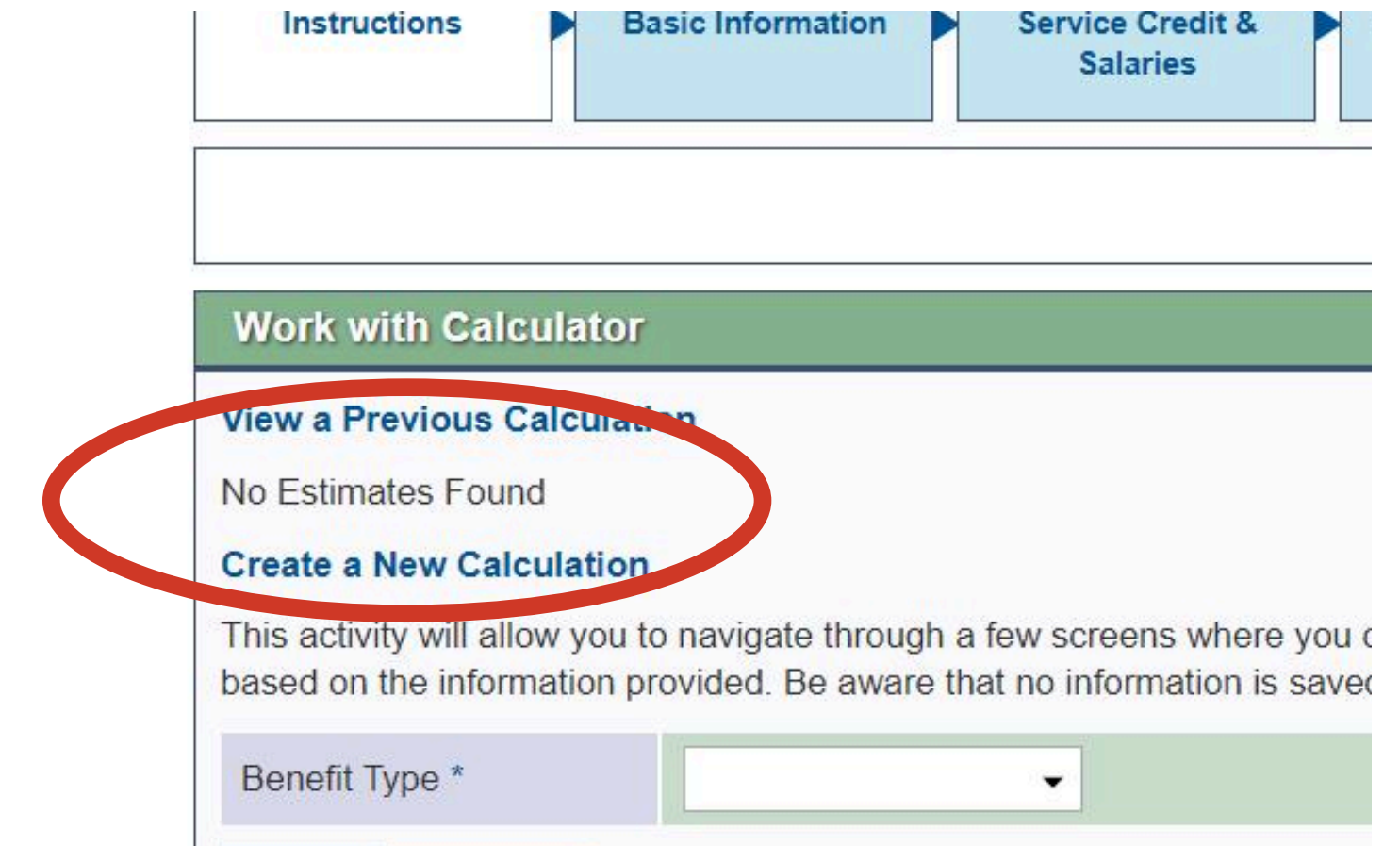
If naming multiple beneficiaries at retirement, select "Yes" for Multiple Beneficiaries; otherwise, leave "No" selected

[Continue](#) [Back](#) [Cancel](#)

Label Recommendations

💡 Reframe Terminology

- 'No Estimates Found' is confusing since there is "Request an Estimate" tab, but it appears exactly same on "Benefit Calculator" when there's no previous calculation requested. Could change it to 'No Previous Calculation Found'.
- 'Retirement Date ' can be changed to 'Desired / Proposed Retirement Date' or 'Expected last date of working'
- 'Active Death' is unclear for Benefit Type. It could be changed to 'Active Member Death'
- 'Death Date' could be 'Date of Member passing'/"Date of Member Demise"/"Date of Demise".



Design findings

Featuring PLSO

- Displaying Partial Lump Sum Option (PLSO) as a field when it is **not applicable** to Disability or Active Death

Calculation Results	
Retirement Date	07/31/2024
Beneficiary Relationship	Spouse
Beneficiary Age	0
Highest Average Salary	\$52,790.00
Years of Total Service	25
Total Service	$25 \times 2.300 = 57.50\%$ $\$52,790.00 \times 57.50\% = \$30,354.25$ Standard Annuity per Year (gross) $\$30,354.25 \div 12 = \$2,529.52$ Standard Annuity per Month (gross)

Option Results				
	Payment Option	12 Months-PLSO	24 Months-PLSO	36 Months-PLSO
Partial Lump Sum Option (PLSO)	N/A	N/A	N/A	N/A
Standard Annuity	\$2,529.52	N/A	N/A	N/A
Option 1	N/A	N/A	N/A	N/A
Option 2	N/A	N/A	N/A	N/A
Option 3	\$2,523.20	N/A	N/A	N/A
Option 4	\$2,505.49	N/A	N/A	N/A
Option 5	N/A	N/A	N/A	N/A

Cost to Purchase State Sick and/or Personal Leave Service			
Annuity With Purchase	\$ 2,630.70	Estimated Total Cost	\$ 14,658.46
Annuity Without Purchase	\$ 2,529.52	Actuarial Factor	144.8751
Annuity Difference	\$ 101.18	Number of months to recover the cost	145

If you meet the eligibility requirements on your last day of employment before retirement, you may purchase one year of service credit if you have 50 days or 400 hours of unused state sick and/or personal leave accumulated at no more than five days per year. Purchased state sick and/or personal leave may not be used to establish eligibility for retirement. This purchase can only occur at the time of retirement.

Option Results with State Sick and/or Personal Leave				
	Payment Option	12 Months-PLSO	24 Months-PLSO	36 Months-PLSO
Partial Lump Sum Option (PLSO)	N/A	N/A	N/A	N/A
Standard Annuity	\$2,630.70	N/A	N/A	N/A
Option 1	N/A	N/A	N/A	N/A
Option 2	N/A	N/A	N/A	N/A
Option 3	\$2,624.12	N/A	N/A	N/A
Option 4	\$2,605.71	N/A	N/A	N/A
Option 5	N/A	N/A	N/A	N/A

[Tell me more about the Calculation Results screen.](#)

Standard Annuity - This retirement plan provides you the maximum amount of benefit each month. If you select the Standard Annuity, it ends upon your death.

Option 1 - 100 Percent Joint and Survivor Annuity - This retirement plan provides a reduced annuity, which is paid to you throughout your lifetime. You may designate only one beneficiary to receive a joint and survivor annuity. Upon your death, if the designated beneficiary survives you, the designated beneficiary would receive 100 percent of the reduced annuity throughout the beneficiary's life. If the designated primary beneficiary dies before you, your annuity will be increased to the standard annuity amount after you notify TRS of the beneficiary's death.

Option 2 - 50 Percent Joint and Survivor Annuity - This retirement plan provides a reduced annuity, which is paid to you throughout your lifetime. You may designate only one beneficiary to receive a joint and survivor annuity. Upon your death, if the designated beneficiary survives you, the designated beneficiary would receive one-half of the reduced annuity throughout the beneficiary's life. If the designated primary beneficiary dies before you, your annuity will be increased to the standard annuity amount after you notify TRS of the beneficiary's death.

Option 3 - Guaranteed Period Annuity - 60 monthly payments - This retirement plan provides a reduced annuity which is payable to you for life. If you die before 60 monthly payments have been issued, payments will be made to the beneficiary until the remainder of the 60 payments has been made. Option Three is not available to a member retiring at age 104 or older.

Option 4 - Guaranteed Period Annuity - 120 monthly payments - This retirement plan provides a reduced annuity which is payable to you for life. If you die before 120 monthly payments have been issued, payments will be made to the beneficiary until the remainder of the 120 payments has been made. Option Four is not available to a member retiring at age 93 or older.

Option 5 - 75 Percent Joint and Survivor Annuity - This retirement plan provides a reduced annuity, which is paid to you throughout your lifetime. You may designate only one beneficiary to receive a joint and survivor annuity. Upon your death, if the designated beneficiary survives you, the designated beneficiary would receive 75 percent of the reduced annuity throughout the

Request an Estimate

PURE Rating: 6

Sub-steps

1. Select Planning Tool > Click Request an Estimate > View Page
2. Create a New Estimate
3. Fill-in Basic Info
4. Submit and View previous request

Design Recommendations

💡 Stepper clarity

- Here the second step looks active instead of the first

Request An Estimate



Workflow Recommendations

💡 Additional retirement date

- Allows members to request multiple estimates despite stating earlier that only one can be requested
- Second retirement date field is far from the first

Retirement Date *	<input type="text" value="August 2024"/> <small>If multiple retirement dates, enter Retirement Date for Additional Estimate below.</small>
Are you currently working in a TRS-covered position? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Title of Most Recent Position	<input type="text"/>
Number of Days per Contract/Year	<input type="text"/>
Whom do you plan to name as beneficiary at retirement?	
Multiple Beneficiaries *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Beneficiary Name	<input type="text"/>
Beneficiary Relationship	<input type="text"/>
Is the Beneficiary a TRS Member?	<input type="radio"/> Yes <input type="radio"/> No
Beneficiary Date of Birth	<input type="text"/>
Beneficiary Gender	<input type="text"/>
Have you ever contributed to any of the following Texas public retirement systems? (Check all that apply)	
	<input checked="" type="checkbox"/> Employees Retirement System of Texas
Service credit to purchase (Check all that apply)	
	<input type="checkbox"/> Previously Withdrawn Service <input type="checkbox"/> Unreported Service and/or Compensation <input type="checkbox"/> Substitute Service (requires at least 90 days of substitute service in a school year) <input checked="" type="checkbox"/> Out-of-State Service <input checked="" type="checkbox"/> Developmental Leave Service <input type="checkbox"/> Military, including USERRA Service <input type="checkbox"/> Membership Waiting Period Service <input type="checkbox"/> Work Experience by a Career or Technology Teacher <input type="checkbox"/> State Sick and/or Personal Leave Service (requires 50 days or more, or 400 hours or more of accumulated state sick and/or personal leave)
Retirement Date for Additional Estimate	<input type="text" value="-----"/> <small>Enter Retirement Date for Additional Estimate if applicable.</small>

Label Recommendations

💡 'Number of Days per Contract/Year' Unclear

- Hover text or other contextual information could help users

Benefit Type	Disability Retirement
Retirement Date *	<input type="text" value="August 2024"/> If multiple retirement dates, enter Retirement Date for Additional Estimate below.
Are you currently working in a TRS-covered position? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Title of Most Recent Position	<input type="text"/>
Number of Days per Contract/Year	<input type="text"/>

Label Recommendations

💡 Most recent position

- Label unclear: TRS or non-TRS position?
 - Recommendation: Add contextual information or revise label (e.g., 'TRS-covered')
 - Drop-down menu?

Benefit Type	Disability Retirement
Retirement Date *	<input type="text" value="August 2024"/> If multiple retirement dates, enter Retirement Date for Additional Estimate below.
Are you currently working in a TRS-covered position? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Title of Most Recent Position	<input type="text"/>
Number of Days per Contract/Year	<input type="text"/>

Design Recommendations


💡 Updating communication method

- Link to edit communication method not provided close to the field



[Accounts](#) [Planning Tools](#) [Benefits](#) [Beneficiary](#) [Payments](#) [Account Management](#)

Request An Estimate

 Your request for an estimate has been submitted. An estimate will be provided in approximately 3-4 weeks via your preferred method of communication.



Request An Estimate Instructions

View a Previous Estimate Request

Request ID	Benefit Type	Submitted On	Beneficiary Relationship
890643	Disability Retirement	07/16/2024	Child

Workflow Recommendations

💡 Retirement date validation

- Retirement date error messages are only thrown after trying to proceed to the next screen
 - Can add validation messages directly after entering date

The screenshot shows a web form titled "Request An Estimate". A red oval highlights an error message box that says "ERROR Retirement dates must be within the current or next fiscal year." Below the error message is a progress indicator with two steps: "1 Instructions" and "2 Request An Estimate". The "2 Request An Estimate" step is currently active. Below the progress indicator is a "Required Fields *" label. The main form area is titled "Basic Information" and contains the following fields:

Benefit Type	Service Retirement
Retirement Date *	June 2026
Are you currently working in a TRS-covered position? *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Title of Most Recent Position	UX Fellow
Number of Days per Contract/Year	300

Design Recommendations

💡 Viewing submitted requests

- 'Retirement date' field (as well as 'Retirement Date for Additional Estimate') are not grayed-out like other fields, despite being unable to edit

Basic Information	
Benefit Type	Disability Retirement
Retirement Date *	August 2024 <small>If multiple retirement dates, enter Retirement Date for Additional Estimate below.</small>
Are you currently working in a TRS-covered position? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Title of Most Recent Position	<input type="text"/>
Number of Days per Contract/Year	<input type="text"/>
Whom do you plan to name as beneficiary at retirement?	
Multiple Beneficiaries *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Beneficiary Name	<input type="text"/>
Beneficiary Relationship	<input type="text"/>

Workflow Recommendations

💡 Editing function

- If possible, add the ability to edit certain details of the request after submission (before it is being processed)

Request An Estimate

1 Instructions → 2 Request An Estimate

Required Fields *

Request An Estimate Instructions

View a Previous Estimate Request

Request ID	Benefit Type	Submitted On	Beneficiary Relationship	Completed On
890675	Service Retirement	07/24/2024		
890658	Disability Retirement	07/18/2024		
890657	Service Retirement	07/18/2024		
890656	Service Retirement	07/17/2024	Former Spouse	
890643	Disability Retirement	07/16/2024	Child	

Create a New Estimate

This activity will allow you to request an estimate of benefits from TRS. All requested information is required to provide you with accurate estimates. Be aware that no information is saved until you click the Submit button. Clicking the Submit saves your information and sends it electronically to TRS. To begin, choose the Benefit Type and click Start, otherwise click Cancel.

To ensure timely and quality service to our members, one estimate request per Benefit Type is allowed per fiscal year. For additional estimates or if you do not plan to retire in the current or the following school year, use the Benefit Calculator to estimate your future benefits.

Benefit Type *

Start Cancel

Workflow Recommendations

💡 Application status

- Additional status indicators beyond submission/completed dates to avoid confusion

Request An Estimate



Required Fields *

Request An Estimate Instructions

View a Previous Estimate Request

Request ID	Benefit Type	Submitted On	Beneficiary Relationship	Completed On
890675	Service Retirement	07/24/2024		
890658	Disability Retirement	07/18/2024		
890657	Service Retirement	07/18/2024		
890656	Service Retirement	07/17/2024	Former Spouse	
890643	Disability Retirement	07/16/2024	Child	

Create a New Estimate

This activity will allow you to request an estimate of benefits from TRS. All requested information is required to provide you with accurate estimates. Be aware that no information is saved until you click the Submit button. Clicking the Submit saves your information and sends it electronically to TRS. To begin, choose the Benefit Type and click Start, otherwise click Cancel.

To ensure timely and quality service to our members, one estimate request per Benefit Type is allowed per fiscal year. For additional estimates or if you do not plan to retire in the current or the following school year, use the Benefit Calculator to estimate your future benefits.

Benefit Type *

Start

Cancel

Update Preferred Mode of Communication

PURE Rating: 8

Sub-steps

1. Select Account Management > Update Preferred Mode of Communication
2. View Preferred Mode of Communication Options screen
3. Confirm Selection
4. Confirmation Screen
5. Navigate back to home screen

Content findings

💡 Information flow

- Too much information all at once
 - unclear what electronic delivery means and when it is mailed
 - present consent for electronic delivery / text options only if relevant option is selected?

Update Preferred Method of Communication

Communication Preference

Select your communication preference below. You may receive an email or text notifications of new documents instead of receiving printed mail. Going paperless can help you protect your personal information. Additionally, TRS will notify you of new secure messages in MyTRS and send appointment reminders via email or text.

By selecting electronic delivery, you consent to receive certain documents in electronic format. Please note that not all documents are available electronically at this time. We will add more documents over the coming years. Email notifications for electronic documents are delivered through Do-Not-Reply@trs.texas.gov.

If an option is not available for you to select, TRS does not have that information on file. To add a mailing address, email address, or cell phone number, go to the Account Management tab.

Communication Preference

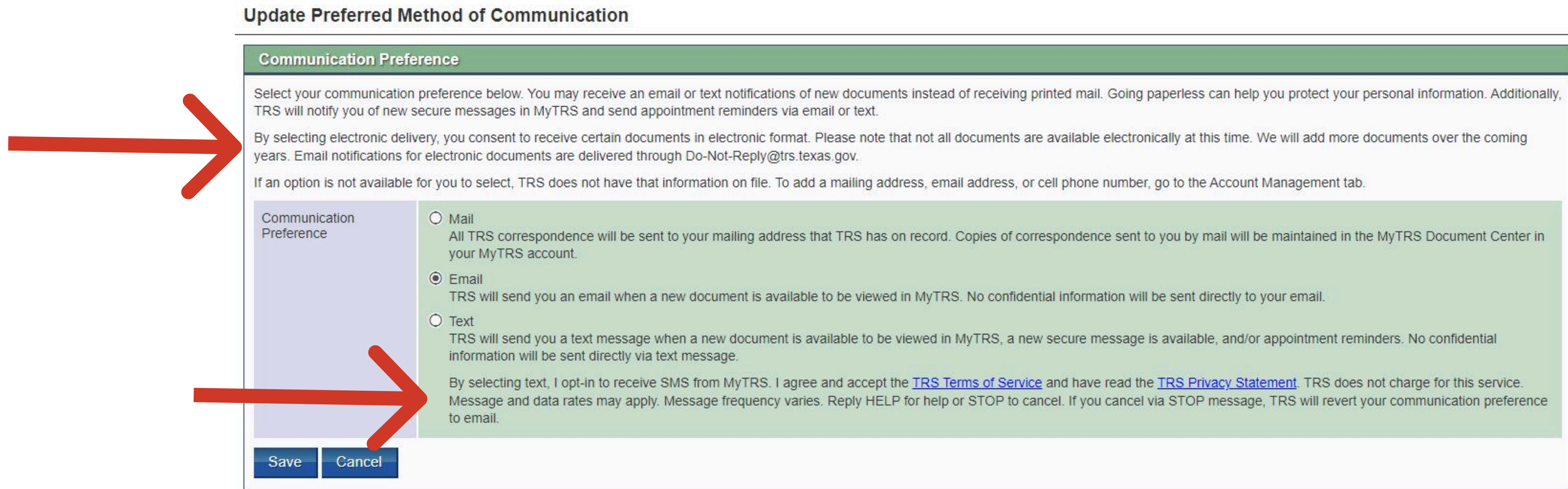
Mail
All TRS correspondence will be sent to your mailing address that TRS has on record. Copies of correspondence sent to you by mail will be maintained in the MyTRS Document Center in your MyTRS account.

Email
TRS will send you an email when a new document is available to be viewed in MyTRS. No confidential information will be sent directly to your email.

Text
TRS will send you a text message when a new document is available to be viewed in MyTRS, a new secure message is available, and/or appointment reminders. No confidential information will be sent directly via text message.

By selecting text, I opt-in to receive SMS from MyTRS. I agree and accept the [TRS Terms of Service](#) and have read the [TRS Privacy Statement](#). TRS does not charge for this service. Message and data rates may apply. Message frequency varies. Reply HELP for help or STOP to cancel. If you cancel via STOP message, TRS will revert your communication preference to email.

Save **Cancel**



Workflow findings

💡 User control & flexibility

- Add check box to allow users to select multiple options
 - Unclear whether selecting one option cancels out previous selections
 - Add No Opt Out / Delete choice for subscription

Update Preferred Method of Communication

Communication Preference

Select your communication preference below. You may receive an email or text notifications of new documents instead of receiving printed mail. Going paperless can help you protect your personal information. Additionally, TRS will notify you of new secure messages in MyTRS and send appointment reminders via email or text.

By selecting electronic delivery, you consent to receive certain documents in electronic format. Please note that not all documents are available electronically at this time. We will add more documents over the coming years. Email notifications for electronic documents are delivered through Do-Not-Reply@trs.texas.gov.

If an option is not available for you to select, TRS does not have that information on file. To add a mailing address, email address, or cell phone number, go to the Account Management tab.

Communication Preference

Mail
All TRS correspondence will be sent to your mailing address that TRS has on record. Copies of correspondence sent to you by mail will be maintained in the MyTRS Document Center in your MyTRS account.

Email
TRS will send you an email when a new document is available to be viewed in MyTRS. No confidential information will be sent directly to your email.

Text
TRS will send you a text message when a new document is available to be viewed in MyTRS, a new secure message is available, and/or appointment reminders. No confidential information will be sent directly via text message.

By selecting text, I opt-in to receive SMS from MyTRS. I agree and accept the [TRS Terms of Service](#) and have read the [TRS Privacy Statement](#). TRS does not charge for this service. Message and data rates may apply. Message frequency varies. Reply HELP for help or STOP to cancel. If you cancel via STOP message, TRS will revert your communication preference to email.

Workflow findings

💡 Update contact information

- Add direct hyperlink to update contact information

Update Preferred Method of Communication

Communication Preference

Select your communication preference below. You may receive an email or text notifications of new documents instead of receiving printed mail. Going paperless can help you protect your personal information. Additionally, TRS will notify you of new secure messages in MyTRS and send appointment reminders via email or text.

By selecting electronic delivery, you consent to receive certain documents in electronic format. Please note that not all documents are available electronically at this time. We will add more documents over the coming years. Email notifications for electronic documents are delivered through Do-Not-Reply@trs.texas.gov.

If an option is not available for you to select, TRS does not have that information on file. To add a mailing address, email address, or cell phone number, go to the Account Management tab.

Communication Preference	<p><input type="radio"/> Mail All TRS correspondence will be sent to your mailing address that TRS has on record. Copies of correspondence sent to you by mail will be maintained in the MyTRS Document Center in your MyTRS account.</p> <p><input checked="" type="radio"/> Email TRS will send you an email when a new document is available to be viewed in MyTRS. No confidential information will be sent directly to your email.</p> <p><input type="radio"/> Text TRS will send you a text message when a new document is available to be viewed in MyTRS, a new secure message is available, and/or appointment reminders. No confidential information will be sent directly via text message.</p> <p>By selecting text, I opt-in to receive SMS from MyTRS. I agree and accept the TRS Terms of Service and have read the TRS Privacy Statement. TRS does not charge for this service. Message and data rates may apply. Message frequency varies. Reply HELP for help or STOP to cancel. If you cancel via STOP message, TRS will revert your communication preference to email.</p>
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Update Address

PURE Rating: 8

Sub-steps

1. Select Account Management > Update Phone Number
2. View Update Phone Screen
3. Update Phone number and validate
4. Confirm change and navigate back to home
5. Review phone number update email

Design Findings

💡 Make difference between Zip Code and Postal Code clearer

- Zip Code and Postal Code can be confusing at first glance with one being required and the other not.
- Indicate that Postal Code is required for a non-US address

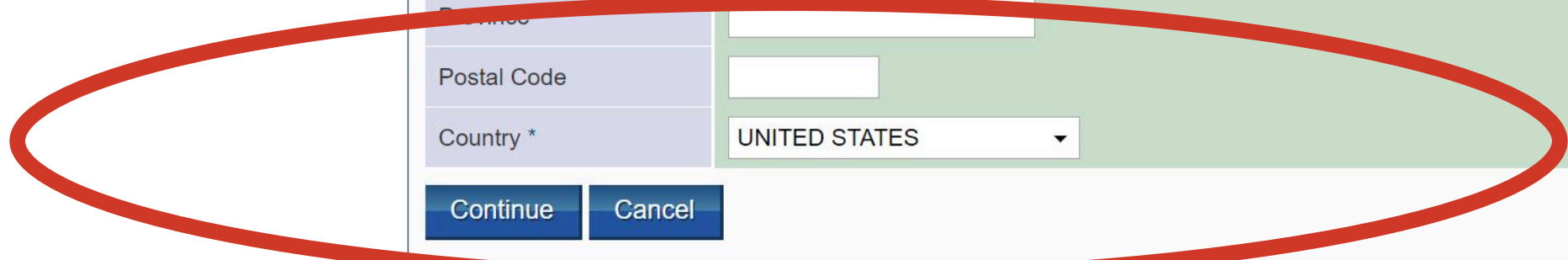
Update Address

Required Fields *

Mailing Address

Address Line 1 *	3100 SPEEDWAY
Address Line 2	
City *	Austin
State	TX
Zip Code	78705
Postal Code	
Country *	UNITED STATES

Continue Cancel



Design Findings

💡 Country list

- United States currently only shows up on top of the list.
- For standardization, we can list United States both at the top and in the alphabetical order of the list.

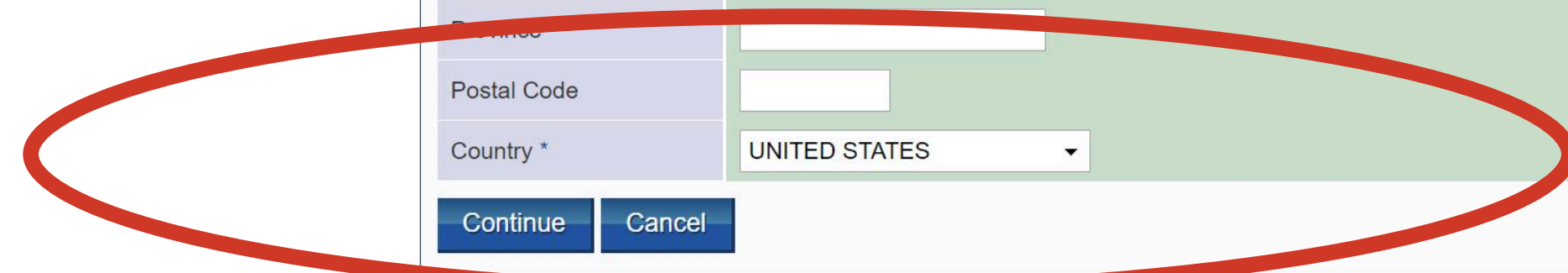
Update Address

Required Fields *

Mailing Address

Address Line 1 *	3100 SPEEDWAY
Address Line 2	
City *	Austin
State	TX
Zip Code	78705
Postal Code	
Country *	UNITED STATES

Continue Cancel



Workflow findings

💡 Suggested address

- Suggested address should pop up right after entering address, rather than going to validation page
- Auto-select the original address unless the user clicks suggested address

Update Address

Validate Mailing Address

Original Address Suggested Address - Based on United States Postal Service formatting

Address Line 1	3100 SPEEDWAY	Address Line 1	3100 SPEEDWAY APT 205
Address Line 2	APT 205	Address Line 2	
City	Austin	City	AUSTIN
State	TX	State	TX
Zip Code	78705-	Zip Code	78705-2850

Update Phone Number

PURE Rating: 7

Sub-steps

1. Select Account Management > Update Phone Number
2. View Update Phone Screen
3. Update Phone number and validate
4. Confirm change and navigate back to home
5. Review phone number update email

Workflow findings

💡 Process clarity

- Warning about MFA phone number not being updated should be indicated more clearly, and ideally only to users who have MFA enabled
 - Make difference between MFA and updating number clear
 - Add hyperlink to MFA page
- Validation description is vague: Could include a timeline
 - Unclear whether updating number here will automatically update for preferred communication method, particularly for non-US numbers present most relevant information first

Changing your phone number on this screen will not update your phone number that is used for logging into MyTRS. Click on Update Multi-Factor Authentication to change your MyTRS login information.

Home Phone

Phone Number

Click here if you have an international home phone number.

Cell Phone

Phone Number

Click here if you have an international cell phone number.

Validated


US cell phones are required to be validated. When updating your US cell phone, a text message will be sent to validate your number. Once validated, you can enable text messaging on the Update Preferred Method of Communication page. Non-US cell phones will not be validated and text messaging will not be available.

Design recommendations

💡 Email notification

- No mention of email notification to watch out for
 - add description: "TRS will send you an email (to address) --- "
 - after submitting new number, can indicate with "Check your inbox" message so users expect the confirmation

Update Phone

 Verification was successful.
Information Saved.

Changing your phone number on this screen will not update your phone number that is used for logging into MyTRS. Click on Update Multi-Factor Authentication to change your MyTRS login information.

Home Phone

Phone Number

Click here if you have an international home phone number.

Cell Phone

Phone Number

Click here if you have an international cell phone number.

Validated


US cell phones are required to be validated. When updating your US cell phone, a text message will be sent to validate your number. Once validated, you can enable text messaging on the Update Preferred Method of Communication page. Non-US cell phones will not be validated and text messaging will not be available.

Content findings

💡 Validation

- Validated section is not clear - should say “validated <phone number>” (clear indication)

Update Phone

 Verification was successful.
Information Saved.

Changing your phone number on this screen will not update your phone number that is used for logging into MyTRS. Click on Update Multi-Factor Authentication to change your MyTRS login information.

Home Phone

Phone Number

Click here if you have an international home phone number.

Cell Phone

Phone Number

Click here if you have an international cell phone number.

Validated

US cell phones are required to be validated. When updating your US cell phone, a text message will be sent to validate your number. Once validated, you can enable text messaging on the Update Preferred Method of Communication page. Non-US cell phones will not be validated and text messaging will not be available.

Label recommendations

💡 Error message

- Can offer more informative guidance on why numbers are invalid

Update Phone



Cell Phone is invalid.


Changing your phone number on this screen will not update your phone number that is used for logging into MyTRS. Click on [Update Multi-Factor Authentication](#) to change your MyTRS login information.

Workflow recommendations

💡 Delete phone number

- Add function to delete existing / recorded phone number, apart from deleting it manually and hitting “save”

Update Phone

 Information Saved.

Changing your phone number on this screen will not update your phone number that is used for logging into MyTRS. Click on [Update Multi-Factor Authentication](#) to change your MyTRS login information.

Home Phone

Phone Number

[Click here if you have an international home phone number.](#)

Cell Phone

Phone Number

[Click here if you have an international cell phone number.](#)

Workflow recommendations

💡 Cancel button

- Cancel button is unclear. Only present warning if unsaved changes present

The screenshot displays the MyTRS Member Portal interface. A dark modal dialog box is centered on the screen, titled "qat5ss.mytrs.texas.gov says". The dialog contains the text: "Are you sure you want to cancel? Canceling this request will take you back to your account home page and you will lose any unsaved changes." Below the text are two buttons: "OK" and "Cancel". A red circle highlights the "Cancel" button, and a red arrow points to it from the right. The background shows the portal's navigation bar with "Accounts", "Planning Tools", and "Benefits" tabs. Below the navigation bar, there is a "Update Phone" section with a green confirmation banner that says "CONFIRM Information Saved." and a warning message: "Changing your phone number on this screen will not update your phone number that is used for logging into MyTRS. Click on Update Multi-Factor Authentication to change your MyTRS login information." The "Home Phone" and "Cell Phone" sections each have a "Phone Number" input field and a checkbox for international numbers. At the bottom of the page, a "Save" button and a "Cancel" button are visible, with a red circle around the "Save" button.

View Membership Card

Task 3

Sub-steps

1. Select Membership Card from top navigation bar
2. Select Membership Card from bottom web page
3. Print Membership Card
4. Close Pop-up

Design Recommendations

💡 Improve Clarity in information presented

- Feature name and participant ID more prominently.
- Include the label - “Participant ID” to make it clearer.
- Include additional information like Membership tier to make it more useful.



Design Recommendations

💡 Flexibility in Closing out the pop-up

- Members could be given the option to click out or click on a close button to close the card.
- Could provide an additional option to download the card, in addition to print it.

The screenshot shows a member profile page for Jenny Rose John with a TRS Membership Card pop-up overlaid. The pop-up is a white card with a blue header containing the TRS logo and the text 'MEMBERSHIP CARD'. Below the header, the member's name 'JENNY R JOHN' and ID '05587295' are displayed. At the bottom of the pop-up are 'Close' and 'Print' buttons. The background page shows member details, a salary table, and a disclaimer.

Member Profile:

JENNY ROSE JOHN
Female
3121 SPEEDWAY
APT 205
AUSTIN, TX 78705
UNITED STATES

Phone: (737) 296-7131
Date of Birth: 07/15/1994
Age: 30 years
Communication Preference: Email @gmail.com

Balance as of 8/8/2024

ered:	\$0.00
	\$2,406.25
	\$0.00
	\$2,406.25

Appointments

ie any scheduled appointments.
e to schedule an appointment with a TRS counselor, cl

Salary

	\$29,167.00
Average	\$29,166.70

MEMBERSHIP CARD

JENNY R JOHN
05587295

Close Print

s - The salaries displayed on this page are those reported by your employer and may not have been audited or adjusted by TRS to meet the requirements for annual compensation as def
S has a duty and reserves the right to review the salaries prior to a distribution of benefits to ensure that:
pensation reported to TRS is creditable under the plan's terms;
pensation is not excluded from the annual compensation amount by any law or rule;
pensation is credited in the correct amount to the school year in which it was paid;
pensation is within the limit on increases allowed by the plan terms in the final years prior to retirement; and
pensation is not excluded because it was converted from non-creditable compensation to creditable compensation in the final years prior to retirement.

CARD

Tentative Ranking

General Recommendations

(on HomePage)

Change label Accounts – Dashboard/Accounts Dashboard

Change label TRS Home – TRS Website

Consistency – High Years, Highest Salaries, High Salaries

Upload Member forms – link on MyTRS Homepage

(while registering)

! Make SSN visible

! Fix security question requirements -

! Make Password visible

! Validate password as it is typed

Cancel/Back workflow

Colors on Stepper - Recommendations

Apply for Retirement

(Content changes)

- "Replace" application – meaning needs to be clarified
- Payment plans and age of beneficiaries error can be made clearer
- Retirement Plan / Payment Plan – STAN/ OPT1/OPT3 can be expanded
- Relabel Benefits → Benefit Applications/Benefit Services

(Workflow/display changes)

- Document ordering / grouping can be improved
- eSign Live can redirect to MyTRS homepage? / Or can close out with a message
- For certain Payment Plan options – we need to specify both a Joint and Survivors Benefits Beneficiary and Death Benefits Beneficiary. The screen flow is unclear.

Schedule Appointment

(Design/Display change)

- Schedule An Appointment CTA – make it prominent
- Remove Radio button
- Accommodations – Drop down list?

(Workflow change)

- Reorder the prompts – Number of guests can be asked after/
based on the type of appointment selected?
Number of guests – Yes or no instead of 0 and 1?
Do you want to bring a guest?
- Edit appointment option – small changes like time?

Benefit Calculator

(Label changes)

- “No previous calculations found”
- “Active Death” – “Active Member Death”/“Death Claims”
- “Retirement Date” – “ Desired/Proposed Retirement Date”
- “Death Date” – “Date of Member Passing”/“Date of Member Demise”/Date of Demise/Date of Passing

(Design/Display change)

- PLSO displayed confusingly when not applicable

Request an estimate

(Workflow change)

- How does the estimate requesting work? Members seem to be able to request multiple estimates (through the Request an Estimate screen + Benefit Calculator screen + Schedule Appointment screen – is only one considered active?)
- Application Status? Make small changes to application? (Edit application option?)

(Design/Display changes)

- Gray out non-editable fields
- Provide instructions for filling out fields closer to the fields – “Number of Days per Contract/Year”
- Title of Most Recent Position – Drop down list

Update Preferred Mode of Communication

(Workflow changes)

- Opt out of subscription
- More than one mode of communication? Checkbox for multiple?
- Add Pencil icon/hyperlink near any suggested "Update"

Update Address

(Workflow changes)

- Auto-select suggested address or indicate that a choice needs to be made

Indicate Postal Code as required for non-US address

Update Phone Number

- Include Participant ID
- Conduct research on what format members most prefer it in.

Redesign Membership Card

- Include Participant ID
- Conduct research on what format members most prefer it in.

Appendix

1. Design Issues and Recommendations
2. Content Issues and Recommendations
3. Label Issues and Recommendations
4. Workflow Issues and Recommendations
5. Evaluation Research Artifacts
6. Benefit Counselor Interviews