



Director Paysheet
Usability Study, March 2021



User Experience



Goals

01

Understand a District Store Directors current process for filling out their Paysheet

02

Get general feedback regarding the look and feel of the new Director Paysheet application

03

Test the usability of the new app with tasks and questions

Key Findings

01

Directors all agree this app will save them time and make their process easier

02

Directors have already predetermined their adjustment numbers prior to filling out the paysheet, but having tax tables and calculators available is desirable.

03

Percentages are the most important information regarding employee bonus totals

The screenshot displays the 'Director's Paysheet' interface. At the top, it shows the HyVee logo and the title 'Director's Paysheet'. Below this, there are tabs for 'Location(s)', 'Director's Check', 'Tax Status', 'Director/Corp. Share', 'Clerk's Bonus', 'Director's Bonus', 'Department Head Bonus', and 'Manager Incentive'. The 'Clerk's Bonus' tab is selected, showing a table with columns for 'Bonus Type', 'Total', '1011-Altosna', and '1013-Ames #1'. The table lists items like 'FTRT Bonus Base', 'FTRT Number On Bonus', and 'FTRT Bonus Wages'. Below this is a 'Deductions' section with a table listing various deductions such as 'Director Share', 'Director Gross', 'HSA', 'Federal Tax', 'State Tax', 'Stock', '401k', 'Non-Union', 'Saves Plan', 'Medical Pretax', and 'STD Pretax'. The interface includes search and filter icons, and a footer with navigation links for 'Huddle', 'Business Applications', and 'Support', along with the HyVee logo and copyright information.

Bonus Type	Total	1011-Altosna	1013-Ames #1
FTRT Bonus Base	16,436.58	8,218.25	8,218.25
FTRT Number On Bonus	112	56	56
FTRT Bonus Wages	489,222.13	239,111.07	239,111.06
PT Number On Bonus	112	56	56

Description	Total	Adjustment	Month 3	Month 2	Month 1
Director Share	6,666.67	0.00	0.00	0.00	6,666.67
Director Gross	6,666.67	0.00	0.00	0.00	6,666.67
HSA	0.00	0.00	0.00	0.00	0.00
Federal Tax	1511.91	0.00	0.00	0.00	1511.91
State Tax	367.05	0.00	0.00	0.00	367.05
Stock	0.00	0.00	0.00	0.00	0.00
401k	0.00	0.00	0.00	0.00	0.00
Non-Union	0.00	0.00	0.00	0.00	0.00
Saves Plan	0.00	0.00	0.00	0.00	0.00
Medical Pretax	418.43	0.00	0.00	0.00	418.43
STD Pretax	6.98	0.00	0.00	0.00	6.98

What did they say about their *current* process?

01 They feel rushed

02 They already know their adjustment numbers prior to the call

What did they say about the *new* look and feel?

01

Looks good

02

This will save them time

Tasks

We gave each District Store Director a series of 4 simple tasks to accomplish as well as some follow up questions.

Task 1

State Tax Adjustment

- o **3/4 Directors were successful with no issues**

One Director thought he could edit inline rather than clicking the edit link, but then later figured it out. It wasn't immediately obvious to him.

- o **All Directors would expect some sort of validation that the adjustment was made.**

Either in the adjustment column, totals column, or in the modal.

The screenshot displays a 'Deductions' table with a modal for editing the 'State Tax' entry. The table has columns for 'Description', 'Total', and 'Month 1'. The 'State Tax' row shows a total of 367.66 and a value of 0.00 for Month 1. The modal, titled 'State Tax', has a close button (X) and two input fields: 'Current Amount' (pre-filled with \$367.66) and 'New Amount' (pre-filled with \$400.00). Below the inputs are 'Cancel' and 'Apply Changes' buttons.

Description	Total	Month 1
Director Base	6,666.67	6,666.67
Director Gross	6,666.67	6,666.67
HSA	0.00	0.00
Federal Tax	1531.91	1531.91
State Tax	367.66	367.66
Stock	0.00	0.00
401k	0.00	0.00
Non-161	0.00	0.00

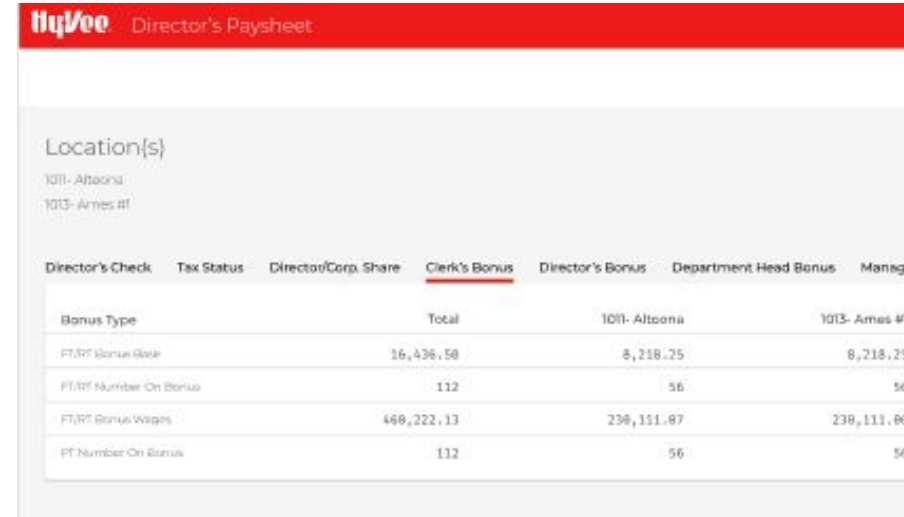
Task 2

Locating Bonus Wage Info

- o **2/4 Directors were successful with no issues**
- o **2/4 Directors had delayed success**

One Director wanted to search by location by clicking the store location at the top of the screen, The other Director wanted to scroll down the page.

Both Directors didn't understand the tabs at first, but soon figured it out on their own.



The screenshot shows the 'Director's Paysheet' interface. At the top, there is a red header with the HyVee logo and the text 'Director's Paysheet'. Below the header, the section 'Location(s)' is visible, listing '1011- Altoona' and '1013- Ames #1'. A navigation bar contains several tabs: 'Director's Check', 'Tax Status', 'Director/Corp. Share', 'Clerk's Bonus' (which is underlined in red), 'Director's Bonus', 'Department Head Bonus', and 'Manag'. Below the tabs is a table with the following data:

Bonus Type	Total	1011- Altoona	1013- Ames #1
FT/PT Bonus Base	16,436.58	8,218.25	8,218.25
FT/PT Number On Bonus	112	56	56
FT/PT Bonus Wages	468,222.13	238,111.07	238,111.06
PT Number On Bonus	112	56	56

Task 3

Locating Dept. Head Bonus Info

- o **4/4 Directors were successful with no issues**

Location(s)

1011- Altoona
1013- Ames #1

Director's Check Tax Status Director/Corp. Share Clerk's Bonus Director's Bonus Department Head Bonus Manag

Department	1011-Altoona	1013-Ames #1
Bakery	\$.00	0.00
Food Service	\$.00	0.00
Meat	\$.00	0.00
Produce	\$.00	0.00

SUCCESS!

Task 4

Locating Manager Incentive Info

- o **4/4 Directors were successful with no issues**

HyVee Director's Paysheet

Location(s)

1011- Altoona
1013- Ames #1

Director's Check Tax Status Director/Corp. Share Clerk's Bonus Director's Bonus Department Head Bonus Manag

Description	1011- Altoona	1013- Ames #1
Net Profit Increase	0.00	0.00
Sales Increase W/O Fuel	0.00	0.00
Total	0.00	0.00

SUCCESS!

Takeaways

- Tabs might not be obvious to all users, so an onboarding document will be valuable.
- Percentages are the most important info regarding bonuses. We may want to display that at the top of the table.
- All Directors have a basic idea of what their adjustments will be prior to filling the out the paysheet, but would like access to tax tables and calculators to add a level of confidence on their decisions.
- We may want to break out other totals by store as well (ie. Profit totals under Dir/Corp. Share tab).
- Directors think this new application will save a lot of time- should be able to accomplish in a few minutes.
- Directors think this application will make filling out their paysheet easier.
- There's no need for search or filter feature- Directors say they would scroll down in the Deductions table.

more **Takeaways**

- 2/4 Directors thought the Directors Gross and the Director's Base totals were fine where they are (located in the Deductions table)- One Director thought they should be located under Dir/Corp. Share tab.
- All Directors would expect some sort of submit button (located at bottom or top of UI, with a confirmation).
- An option to print is desired.
- Pre-populating certain fields was desirable by some of the Directors- Minimum requirements for Stock, 401k, etc.
- Maybe pre-populate Taxes based on standard deductions? (and let Directors adjust them from there?)
- Maybe show percentages for 401k, Stock, HSA?

Recommendations

01

Display employee bonus percentages at the top of the Clerk's Bonus table.

04

Provide Directors access to tax tables and calculators.

02

Pre-populate fields that have a minimum requirement (ie. Stock, 401k).

05

Provide an onboarding document sent to Directors describing the various aspects and functionality of the UI.

03

Display percentages for Deductions like 401k, HSA, Stock, etc.

06

Remove search and filters from the Deductions table.

Questions?



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Thanks!

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User Experience