

ClaimsAgent Testing & Iteration Summary

Part 1: Usability Testing Plan

ClaimsAgent Usability Testing Plan – Initial Concepts

Objective

To evaluate the usability, clarity, and effectiveness of the ClaimsAgent AI assistant in supporting key workflows for insurance claims adjusters. The testing plan is designed to capture how real users interact with core features such as claim submission, status tracking, editing entries, and document upload. By observing user behavior and gathering feedback, we aim to identify areas for improvement and validate the assistant's ability to streamline tasks without sacrificing control or accuracy.

Target Users

- Primary: Claims Adjusters (junior, mid, and senior level)
- Secondary: Supervisors or team leads who review submitted claims
- Experience Level: Range from users familiar with traditional claims tools to those new to AI-assisted platforms

Methodology

- Type: Moderated remote usability testing
- Tools: Zoom, Figma prototype or test environment, screen recording, and think-aloud protocol
- Sessions: 6 to 8 individual sessions, 45–60 minutes each
- Format: Task-based sessions with verbal prompts, live observation, and post-task interviews
- Recruitment: Via internal network and targeted outreach to adjusters

Key Tasks to Evaluate

1. Submit a new claim from scratch
2. Look up the current status of an in-progress claim

3. Correct a mistake in a previously submitted claim
4. Upload supporting documentation to an existing claim
5. Ask the assistant how to complete a rarely performed task (e.g., claim withdrawal or appeal)

Success Metrics

- Task completion rate and accuracy
- Time on task for each workflow
- Number of help requests or missteps
- User confidence (rated 1–5 post-task)
- Clarity of AI prompts and responses
- Rate of user-reported confusion or hesitation

Interview Script Summary

Each session will follow a consistent format:

1. Brief introduction and consent
2. Warm-up discussion about current claims workflows
3. Step-by-step walkthrough of each task with think-aloud feedback
4. Post-task reflections and confidence ratings
5. Final impressions and open-ended questions

Post-Test Questions

- What did you expect to happen when you completed this task?
- Were there any moments where you felt stuck or unsure?
- How did ClaimsAgent compare to tools you're used to?
- What improvements would make this experience smoother?
- Would you feel confident using this tool for live claims work?

Notes

This plan reflects a real-world testing structure tailored to the specific needs and pace of a claims adjustment team. The scenarios were created to represent realistic workflows that users handle daily, ensuring that the evaluation produces actionable insights for the product team.

Part 2: Usability Report – Submission & Status Tracking

ClaimsAgent Usability Report – Submission & Status Tracking

Overview

This report presents findings from usability testing sessions focused on core workflows in the ClaimsAgent platform. Participants were asked to complete representative tasks such as submitting a new claim, checking claim status, correcting errors, and uploading documents. The observations offer a deeper understanding of how adjusters interact with the system and where improvements can drive more efficient and accurate outcomes.

Participant Profile

- Roles: Claims Adjusters (junior to senior)
- Range of technical comfort: novice to experienced
- Testing conducted via desktop environment with screen recording and voice feedback

Key Tasks Evaluated

1. Submit a new claim
2. Check the status of a submitted claim
3. Correct data entry errors post-submission
4. Upload supporting documentation

Key Findings

- Status Terminology Confusion: Users often misinterpreted “Pending Review” and “Submitted.” Multiple participants asked for clarification or clicked on a status label expecting a tooltip or definition.
- Edit Access Expectations: Users assumed the ability to edit claims from within the claim detail view. They searched for an “Edit” button and were confused when the option appeared under a secondary dropdown.
- Upload Process Unclear: Several participants expected drag-and-drop or clickable upload boxes. When only a small upload icon was shown, users either overlooked it or misunderstood its purpose.
- Task Confidence Varied: While users completed most tasks successfully, the absence of clear feedback (e.g., “Claim successfully submitted”) in key places led to hesitation or second-guessing.

Quotes from Participants

- “I’m not sure if this was submitted or not. Did I miss a confirmation?”
- “Oh—I didn’t know that button was for uploading. I thought it was just an icon.”
- “Why does ‘Pending Review’ feel like it needs my action? That’s a little unclear.”

Design Responses

- Added visual status timeline with distinct stages (e.g., Draft > Submitted > In Review > Approved)
- Introduced tooltips and plain-language labels for each status
- Redesigned upload component with large clickable drop zone and descriptive text
- Implemented confirmation banners and task completion summaries

Recommendations

- Provide in-context assistance for ambiguous terms and labels
- Ensure that all actionable elements (e.g., edit, upload, confirm) are clearly visible and labeled
- Include progress indicators or “next step” hints to guide adjusters through longer tasks
- Add an optional onboarding walkthrough for first-time users
- Enable system feedback for both success and failure scenarios

Conclusion

Overall, users were able to complete core tasks within ClaimsAgent, but the experience was improved significantly when clarity, visibility, and contextual guidance were prioritized. Addressing gaps in task confirmation, feature discoverability, and user expectations helped drive greater confidence and reduced the likelihood of user error. Ongoing improvements to language, layout, and guided interactions will further support adoption and efficiency.

Part 3: FAQ & Knowledge Support

ClaimsAgent FAQ & Knowledge Support – Usability Simulation

Overview

This simulated usability report explores how Claims Adjusters might interact with ClaimsAgent to find answers to common questions and resolve edge-case scenarios, using the assistant's built-in FAQ and guidance system. Though no testing was conducted, this document outlines predicted behaviors, challenges, and design considerations.

1. How do I edit a submitted claim?

Simulated Behavior:

- Most users tried typing a free-text question like “how do I fix a mistake in a claim?”
- A few clicked a chip labeled "Edit Claim" but were unsure if it applied to submitted items.
- Some expected an "Edit" option directly on the claim summary screen.

Predicted Challenges:

- Uncertainty around which edits are allowed post-submission.
- Fear that changes would overwrite audit trails.

Design Insight:

- Add tooltip guidance: "You can edit this claim. All changes are logged."
- Include clear language: “Edit with audit history” on the button.

2. What’s the current status of my claim?

Simulated Behavior:

- Users typed queries like “where’s my claim?” or “claim status.”
- Several expected visual indicators (progress bars or labeled steps).

Predicted Challenges:

- Ambiguity between claim statuses (e.g., “Pending Review” vs. “Submitted”).
- No indication of expected resolution time.

Design Insight:

- Add a claim status timeline with icons and short labels.
- Display estimated resolution timeframe.

3. How do I cancel or withdraw a claim?

Simulated Behavior:

- Very few users expected this option to be available via chat.
- Most searched manually or expected to find it buried in account settings.

Predicted Challenges:

- Lack of discoverability.
- Concern about accidentally closing an active claim.

Design Insight:

- Add confirmation flow with "Why are you withdrawing?" and an undo step.
- Label chip more clearly: "Withdraw Claim (with review)."

4. How do I upload additional documents?

Simulated Behavior:

- Most users typed "upload" or "send docs."
- Expected drag-and-drop or mobile upload options.

Predicted Challenges:

- No visible prompt unless the claim was flagged as "missing info."
- Confusion around accepted file types or naming conventions.

Design Insight:

- Add chip or suggestion when typing "upload."
- Offer drag-and-drop box with accepted file types and upload status.

Summary of Insights

- Users often default to free-text queries but appreciate clearly labeled chips when confidence is low.
- Clarity, visual hierarchy, and task-specific language reduce hesitation.
- Allowing simple confirmations and preview messages prevents irreversible actions.

Conclusion

This simulated FAQ usability report reflects anticipated gaps and enhancements that could improve ClaimsAgent's knowledge support experience. Strong onboarding, contextual tips, and dynamic chip suggestions will help adjusters complete non-standard tasks confidently.