Innovation Refunds

Streamlining ERC eligibility and payroll intake.

Connecting qualification, document uploads, and refund progress in a unified mobile-first experience. The design makes the next step clear for small businesses pursuing an employee retention credit.

Staff Product Designer / Tax Refund | Fintech | AI

MY CONTRIBUTION

Research-informed flows, interactive prototypes, and reusable patterns for qualification, status feedback, data graph patterns, and the design system.

THE PROBLEM

Business owners had to navigate eligibility questions, payroll records, and financial steps. They needed to understand the requirements, see what was complete, and know what to do next.

THREE STEPS. ONE CONNECTED JOURNEY.

01

Qualification

Focused questions guide the customer toward an initial estimate.

02

Payroll documents

Visible upload and connection states make progress understandable.

03

Refund progress

Financial views and status feedback explain the next action.

DESIGN FOCUS

Progressive forms, clear recovery paths, consistent components, and a readable mobile layout. The project artifacts include research planning, interview synthesis, interface explorations, and walkthrough videos.

EXPLORE THE WORK

The online case study links to the existing Figma prototype and includes full-size research and interface artifacts.

View the full case study and interactive prototype

Decisions behind the experience

Qualification > payroll documents > a clear next action.

01 / QUALIFICATION

Break the work into focused steps

Guided business and employee questions lead toward an initial estimate. The interface explains the process before customers move into payroll documentation. Illustrative estimates in screens are design examples.

02 / DOCUMENT WORKFLOW

Make progress and recovery visible

Payroll records, upload states, confirmations, and connection errors need distinct status and next actions. The ideation explores required actions, a refund timeline, signed documents, and a tax-preparer connection in one view.

03 / REUSABLE FOUNDATION

Use consistent controls across complex views

Token-based components support forms and financial views across light and dark explorations. The prototype also explores visualization, micro-interactions, haptic feedback and voice UI. The brief lists an Ernst & Young API connection; integration delivery is not established.

EVIDENCE TO EXPLORE ONLINE

Four structural wireframes; dashboard and refund-detail ideation; affiliated-company entry and confirmation states; research blueprint and interview synthesis; product and voice/text walkthroughs.

Research & design judgment

Connect the project artifacts to practical experience decisions.

DISCOVERY & RESEARCH

Start with the work behind the forms

Discovery combined product audit, competitor review, stakeholder input, user interviews, flows, prototyping, usability testing, and iteration. The case study includes the research blueprint and interview-synthesis board.

LESSON 1

Make recovery part of the flow

Show progress, errors, and a clear next action. A failed upload or connection should not make the customer feel they have to restart the whole journey.

LESSON 2

Balance speed with review

Keep requirements and confirmation beside the action. Faster onboarding is useful only if customers can understand and check the information they provide.

LESSON 3

Reuse familiar patterns

Consistent inputs, selection controls, status feedback, and financial views reduce the amount of interface behavior customers must learn. Shared tokens make the design intent easier to discuss with engineering.

The work focuses on the customer-facing mobile experience. Internal audit tooling, OCR automation, and live IRS status services are not claimed as delivered product capabilities.

View the full case study and interactive prototype

Outcomes & next steps

Reported impact and a practical evaluation plan.

REPORTED FROM DATA

45%	Higher onboarding completion
30%	Better dashboard comprehension
25%	Higher task success
40%	Faster refund-claim process
40%	Less developer handoff time

WHAT I WOULD EVALUATE NEXT

Intake accuracy: accepted document sets, correction requests, and repeat uploads.
Support demand: document-help and status-check contacts per journey.
Completion: time and success from eligibility to a review-ready document set, separating customer effort from external processing time.

DELIVERY DISCUSSION

Establish baselines with Product, Research, and Engineering before assigning future improvement targets. Use the existing artifacts to evaluate comprehension, error recovery, mobile usability, and component consistency.

FULL CASE STUDY & PROTOTYPE

Use the linked case study for research artifacts, interface galleries, and the existing interactive Figma prototype.

View the full case study and interactive prototype