

# Finances in a Student Portal

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A Case Study  
by Chelsy Albertson

# Project Overview



The product:

An improved and holistic way to display financial information to students in a student portal



Project duration:

August 2024 - ongoing

# Central Question



How can we distill complex financial information to students in an easy-to-read design?

# Project Overview



My role:

UX Designer & Content Designer



Methods:

UX Design in Figma  
Content collaboration  
across multiple  
departments



Responsibilities:

At first, my responsibilities focused solely on content collaboration. After some miscommunications between members of my team, I was tasked with creating and editing the designs in Figma, as well.

# Hurdles



Financial information at a university is **extremely** difficult to understand.



Other members on my team did not understand the business requirements that were asked of them.

# Solution Approaches to Hurdles



I listened, I asked questions, I took notes, and I researched financial information until I understood exactly what was needed from our content and designs in Figma.



After my colleague attempted to understand the complex financial environment of the university and the business requirements from stakeholders, he became exasperated and asked me to create and edit the designs in Figma myself.

# Original Designs



I started by looking at the designs that were already created and considering our stakeholders' feedback.

## Financial Card

Select Term Year: 2024-2025

**Good**  
Current SAP Status  
[Learn More](#)

**Full time**  
Enrollment Status  
[Learn More](#)

**3 pending**  
Todo's  
[Learn More](#)

### Apply for Financial Aid

- Apply**  
Information about applying to Financial Aid. Find FAFSA and Scholarship status  

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**FAFSA Status** Completed  
No action is required. The requesting department has received required information for this request. April 3, 2024

**Scholarship Status** Incomplete  
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip April 3, 2024
- Complete** Todo's
- Offers & Awards**
- Authorize Aid**

### Financial Aid

Anticipated Aid \$80.00  
Anticipated aid only includes aid that is ready to apply to your bill. Some financial aid amounts may not appear here if you have not completed financial aid to-do items or if the Office of Financial Aid has not received any private loan/scholarship checks.  
[View Financial Aid](#)

### Current Bill

[Show Balance](#)

**Info: Payment Due on the 5th**  
Payment for your tuition bill is due on the 5th. This is a reminder to pay on time in order to avoid late and finance charges, as well as holds which will prevent registration for future classes.  
[View More Information](#)

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[View More Information](#)

Main Campus Balance	\$10,340.86
Continuing Education Balance	\$342.54
Payment Plan	Not Enrolled
Due Date	December 22, 2024

**Important:** You have a pending amount to pay.  
[Pay Bill](#)

### Account Setup

**Authorize Payer** [Manage Authorize Payers](#)

Authorize parents/others to view and pay your tuition bill, sign up for payment plans, receive email notifications and sign up for text notifications about your bill

<b>Esther Walker</b> esther_walker@gmail.com	<b>Bill Kihn</b> bill_kihn@gmail.com
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**Authorize Aid to pay all charges** [About Authorizing Aids](#)

# Original Designs



## Stakeholder feedback:

- There cannot be a “term year” dropdown in this new financial experience. Only one year is available to be shown at a time.
- There should not be numbered steps for applying for Financial Aid, because students don’t have to complete them in order.
- The Bursar and Financial Aid offices need a place where they can write announcements and notifications that students will see on this card.

**Financial Card** Exit Full Screen

Select Term Year: 2024-2025

**Good** Current SAP Status [Learn More](#)

**Full time** Enrollment Status [Learn More](#)

**3 pending** Today's [Learn More](#)

**Apply for Financial Aid**

- 1 **Apply**  
Information about applying to Financial Aid. Find FAFSA and Scholarship status  

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- 2 **Complete Today's**
- 3 **Offers & Awards**
- 4 **Authorize Aid**

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[Pay Bill](#)

# Original Designs



## My own feedback:

- When the user collapses the full view into the card view, important information that users need to see will not be above the fold and will require a long scroll.
- The highlight boxes at the top should be more consolidated into one or two boxes of information.
- We should avoid a columned approach, which contributes to the length of the card view (the most common view in the student portal).

# My Designs



## My actions:

- Consolidate highlight boxes so that many pieces of important information show in only two boxes
- Eliminate most columns within the full screen view so that the card view will show most important information above the fold
- Categorize information into “Critical Tasks” and “Account Setup” for user clarity
- Add a notification section at the top where the Bursar and Financial Aid offices can write announcements to users

**Holistic Financial Card** Exit Full Screen

**Info: Add Header Title**  
The Online Experience will open on May 10. You must complete the Enrolling in Classes module before you can register for classes.

The information shown below is for the current aid year 2024-2025. To plan for next year financial aid, view [Financial Planning card](#).

Tuition & Fees		Financial Aid Status	
Main Campus Balance <b>\$6423.65</b>	Continuing Education Balance <b>\$6423.65</b>	SAP Status <b>Good</b> <a href="#">Learn more</a>	Enrollment Status <b>Full time</b>
Current Amount Due <b>\$6423.65</b> <span style="color: red;">● Past Due</span>	Balance Due Date <b>March 15, 2025</b>	Financial Aid Awarded - Fall 2025 <b>\$17,291.00</b>	Financial To-Do's <b>3 pending</b> <span style="color: red;">● Past Due</span>
<a href="#">View / Pay Bill</a>	<a href="#">View Payment Plans</a>	<a href="#">View Financial Aid Details</a>	<a href="#">View To-Do's</a>

**Critical Tasks**

**Student Health Insurance** [About Health Insurance](#)  
You have **waved** student health insurance for this academic year. No further action is necessary until next fall when you will be required to make your selection again.  
Status: [Waved](#)

**Authorize Aid** [About Authorizing Aids](#)  
Allow your aid to pay all university charges, such as textbooks, parking fees, health insurance and optional student fees.

**Payment Plans** [About Payment Plans](#)  
Students and authorized payers can sign up for interest-free payment plans to pay tuition and fees over the course of each semester.

Status	Payment Plan Type	Next Payment Due
<span style="color: green;">● Enrolled</span>	5 Payment	Oct. 5

**Account Setup**

**College Opportunity Fund (COF)** [View your COF information](#)  
You have authorized the College Opportunity Fund spend. If you have questions, please contact the Office of the Registrar, registrar@colorado.edu

**Authorize Payer** [Manage Authorize Payers](#)  
If someone is helping pay your bill, you can authorize them as a payer and their name will show here. Authorized payers can view and pay the tuition bill and sign up for payment plans. They will also receive an email when the next bill is available online.

Name	Role
Bill Kihn	Authorizing Payer
Esther Walker	Authorizing Payer

**Holistic Financial Card** Favorite Full Screen

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# My Designs



## My actions:

- Place future financial aid information in a separate card and notify students to look at that card to see a different “term year” (business offices requested to keep years separate)
- Add more obvious CTAs so users know what to do next
- Specify help link language (instead of “Learn More”) so that users know where to click to get more information about only what they need

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Continuing Education Balance	\$6423.65	Enrollment Status	Full time
Current Amount Due	\$6423.65 <span>Past Due</span>	Financial Aid Awarded - Fall 2025	\$17,291.00
Balance Due Date	March 15, 2025	Financial To-Do's	3 pending <span>Past Due</span>

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# My Designs



## My critiques of my designs:

- While the horizontally long, gray boxes follow the university's color theme, gray looks a bit dull.
- While I eliminated most of the column format, the long, horizontal boxes create a bit of unnecessary white space.
- While I shortened the scroll that is required of users in the card view, did I shorten it enough?

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# Result



My colleague, my supervisor, and business office stakeholders were **thrilled** with my designs. My colleague felt relief that he had a new starting point in the designs from which to iterate. My supervisor felt impressed with my ability to pivot the designs in the direction they needed to go. The stakeholders felt listened to and understood as they explained very complex financial information.

# What I Learned



- The complexity of student finances at a university
- How to gently and humbly take over a task that isn't going well
- How to build trust with stakeholders

The End

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