

Case Study

Login and MFA

Flow

Design a new login and multi-factor authentication (MFA) experience for an enterprise portal

Skills: Content design and UX writing

The Context

When I worked at a health insurance company, **we decided to transition to a new backend service for logging in and multi-factor authentication.** Due to these backend changes, we decided it was a good time to give the visual experience a refresh as well. But the challenges we faced were more than visual: **we were introducing MFA to some platforms for the first time, and we needed to guide users through this process.**

As the content designer on this project, my job was to collaborate with the lead UX designer to **make sure the information architecture made sense, provide helpful content** to guide users through MFA for the first time, and **create reusable content** that could be used for other platforms that were also getting MFA upgrades.

The Needs

Based on the changes that were being made to the backend process, there were several content design needs that I had to keep in mind. These included:

- **Providing clear instructions** about how MFA worked and how to set it up
- **Include helper text** to reduce the number of errors that users make up front
- **Include specific error messages** for the various different types of errors that can occur with MFA

The Need: Providing Clear Instructions

My goal was to make sure users understood how MFA worked and how to set it up, especially since many of these users hadn't used MFA in our platforms previously.

Keep your account safe

✔ Your email has been verified. ✕

Almost done! Set up one more verification method to continue to your account.



Text message

Text me a verification code



Phone call

Call me with a verification code



Authenticator app

Let me use my authenticator app



Biometrics

Let me use biometrics on my device

Clear Instructions

I added instructional content throughout the flow, but one example can be seen on the left. This screen displayed after users had set up their first MFA method (they were required to set up two methods).

I kept a **consistent header** throughout the MFA process to let them know why we needed them to set up MFA (“Keep your account safe”), **included a sign post to indicate how much time was left** in the process (“Almost done!”), **told them what to do** to get to their account (“Set up one more verification method...”), and **used simple language to explain the different MFA types** they could choose from (such as “Text me a verification code”).

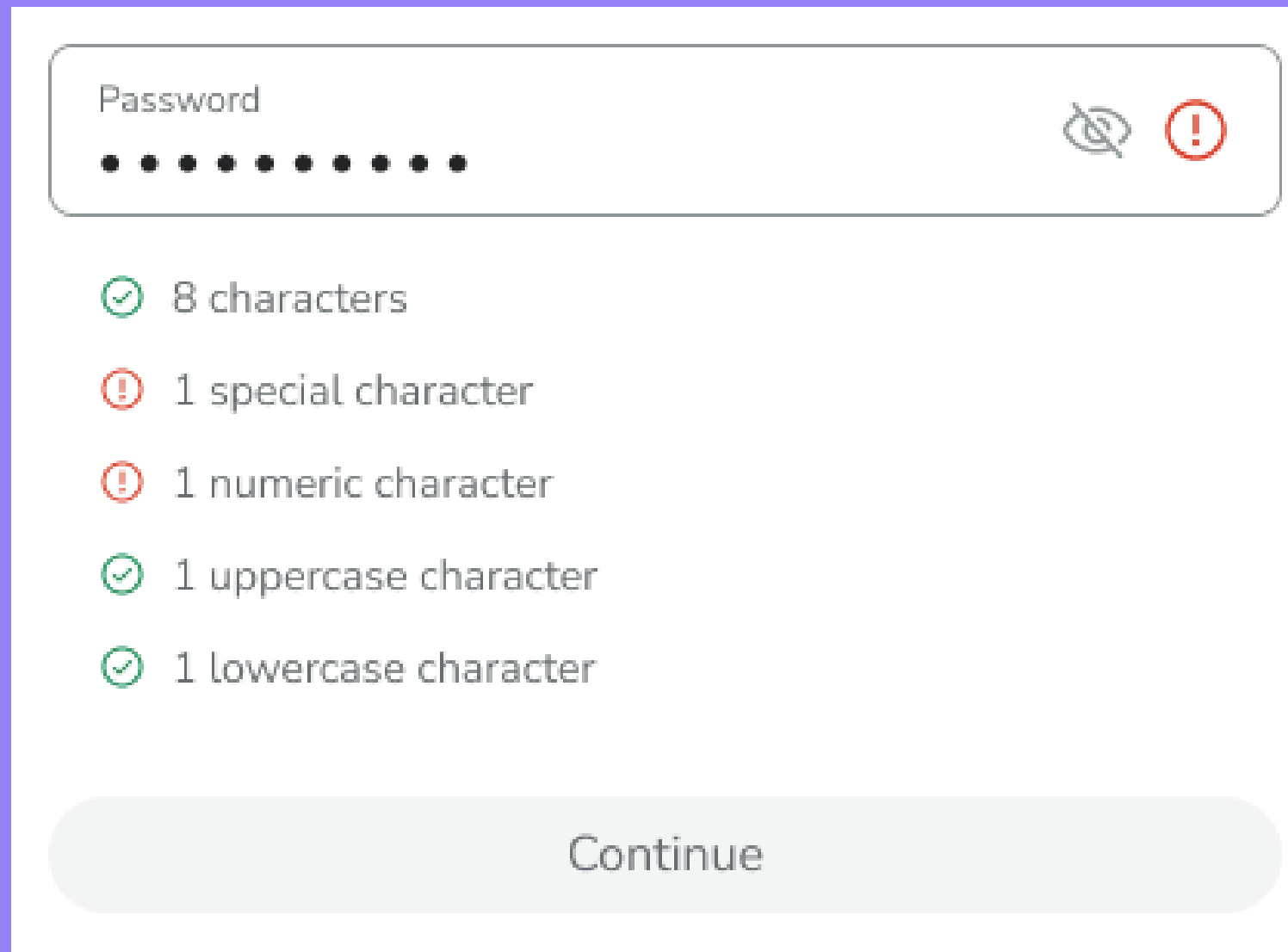
The Need: Include Helper Text

My goal was to provide helper text throughout the flow to reduce the number of errors that users made up front. As with any UX copy, I strived to ensure that content was helpful without being overwhelming.

Helper Text

I added helper text throughout the flow, but one example can be seen on the left. This screen displayed when users were creating a password for their account.

There were several password criteria that users had to meet. To **make these criteria easy to understand and scannable**, I wrote them in short, line-by-line form. This **made the criteria easier to read compared to a longer, paragraph-form tooltip**. Users could also **get real-time feedback when they met the criteria**, as indicated by the green checkmark icon.



The screenshot shows a password creation interface. At the top, there is a text input field labeled "Password" containing ten black dots. To the right of the input field are two icons: a grey eye with a slash through it (indicating the password is hidden) and a red circle with a white exclamation mark (indicating an error or warning). Below the input field, there are five lines of helper text, each preceded by a small circular icon. The first line has a green checkmark icon and the text "8 characters". The second line has a red circle with a white exclamation mark icon and the text "1 special character". The third line has a red circle with a white exclamation mark icon and the text "1 numeric character". The fourth line has a green checkmark icon and the text "1 uppercase character". The fifth line has a green checkmark icon and the text "1 lowercase character". At the bottom of the screen, there is a light grey rounded rectangular button with the text "Continue".

The Need: Include Specific Error Messages

My goal was to provide error messages for the various types of errors that can occur with MFA. The more specific, the more likely users will be able to fix issues on their own, and the more trust they will have in the company.

Create your account



Sorry, the username you chose already exists. Please choose a different username.



Specific Error Messages

I added error messages throughout the flow, but one example can be seen on the left. This screen displayed when users tried to create an account with a username that already exists.

There are several errors that can occur in a login or MFA flow. Some are simple typos (like inputting the wrong password), while others are more technical issues (like trying to use an unauthorized biometrics device for MFA). My goal was to improve previous error messages in the platform by **making it clear what issue had occurred and how users could fix it.** This meant creating **specific error messages for a variety of errors, instead of using out-of-the-box messaging.**

The Wins



Users were able to easily navigate the login and MFA flow start to finish.

We received positive user feedback about creating accounts and setting up MFA.



I got to collaborate with security experts and support teams on messaging.

The MFA and login process contains sensitive data. So, I got to collaborate with security and support teams to ensure the process was secure.



We set a standard for new MFA and login flows in other platforms.

The content and designs used throughout this enterprise portal were later reused in other company portals.