

Check Employment Status for Tax - Sprint Review - 7th March

PRODUCT VISION

Users

Primary:

- Public sector employers
- Large and medium private sector employers

Secondary:

- Intermediaries and workers may also use the product
- Specific user groups
- Agencies

Needs

How will it meet a user's needs:

- Allow both public and private sector users to correctly administer the worker's payment for tax purposes
- Allow users to be able to answer questions that will give an accurate assessment of a worker's status
- Allow users to easily understand the purpose of the tool, and the next steps
- Allow users to submit feedback
- Allow users who work in specific industries to quickly exit the tool
- Allow users to perform more than one check in a session (not having to start again)
- Allow users to get help using the tool

Welcome



Our new content designer



Goals for this Sprint

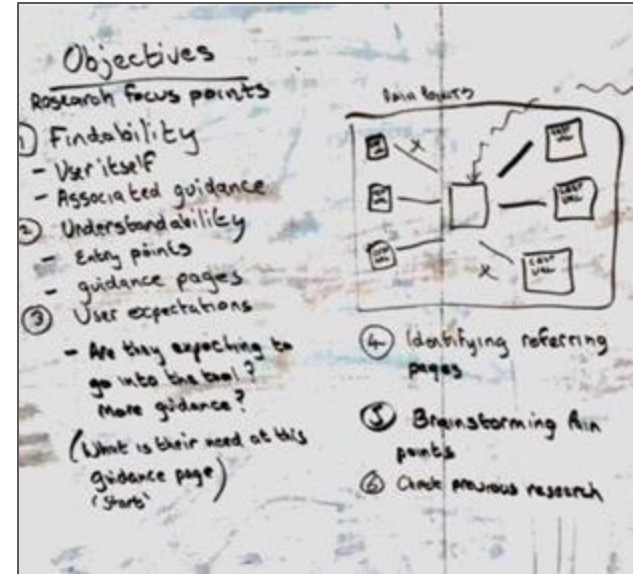
Research Focused Objectives

- Findability
 - How does the user find the tool?
- Understanding
 - Language in tool and guidance
- User Expectations
 - Tool and guidance

Review previous research and feedback

New research

Product Management - Goal to understand and take ownership of backlog



Done during this sprint

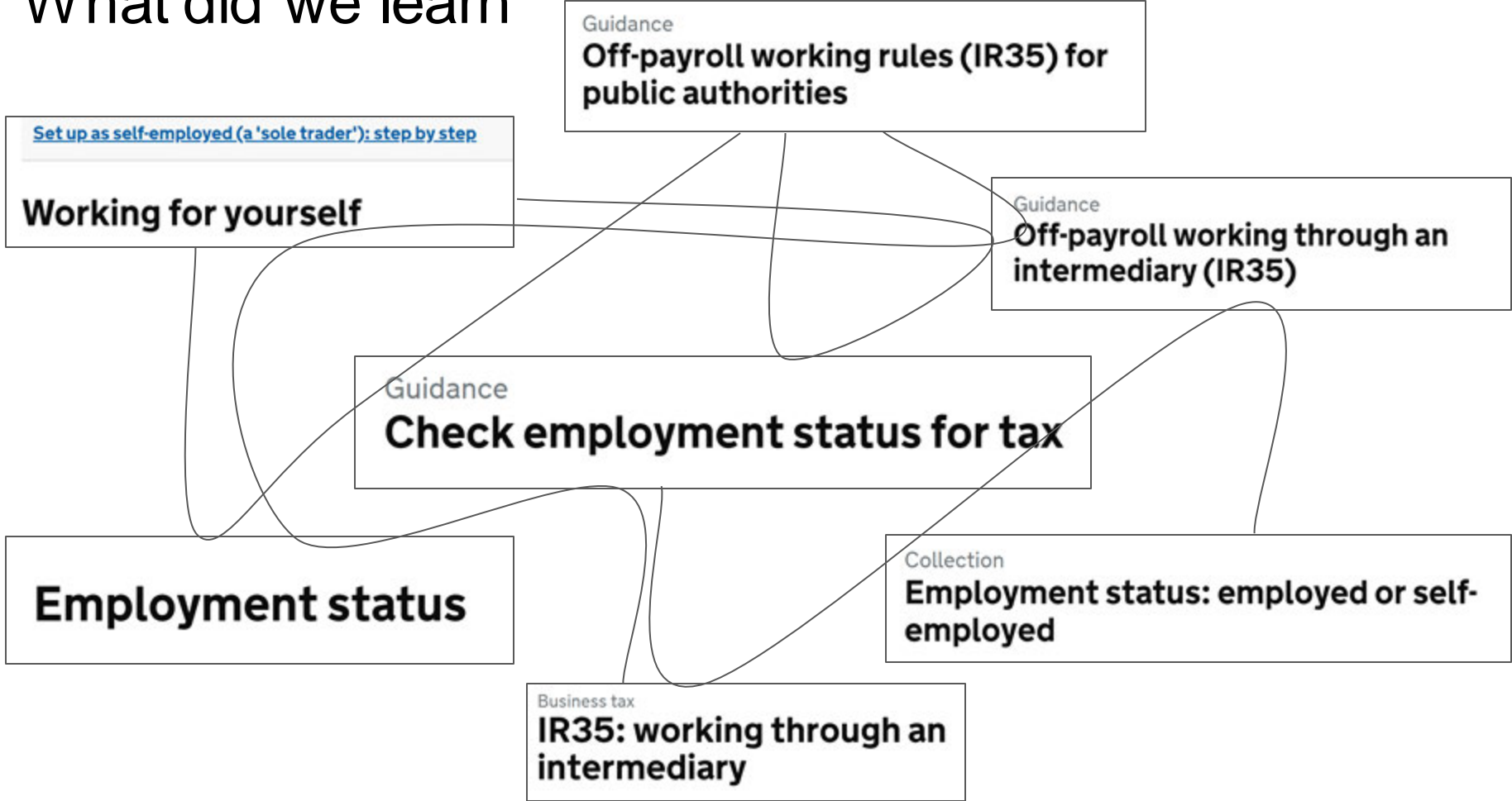
- Engaged Gov.uk Content Writer (Ticket #13374)
- Backlog handed over from Live Services
- Engaged GA performance analytics team
- Created high level EPIC stories
- Google Analytics now working (apart from period when switched off). Measures from the point of decision rather than PDF

Done during this sprint

User Research

- Spoke with 6 IT contractors - discussion around thoughts on current tool (findability, ease of use, terminology, next steps)
- Begun work on the persona creation - still a work in progress and will be updated with the more users we speak with
- Engaged with hiring managers/resourcers within Capgemini for future research sessions
- Findings report:
- Take-away findings from the meeting with xxxx (6th March) xxxx, xxxx & xxxx
 - Some of the questions are too ambiguous
 - Some answers are too close and hard to differentiate between
 - Wording is too subjective and open to interpretation leading to confusion when choosing answers
 - Need to know that they can have confidence in the tool

What did we learn



What do we propose

Based on our learning, what do we propose

Soon this will be the point where we demonstrate what changes we are proposing to take out for user testing

Link to prototype



Next steps

Hold your horses or good to go moment.

	Pre-Discovery & Discovery		Alpha/Beta								
	Sprint 0	Sprint 1	Sprint 2	Sprint 3	Sprint 4	Sprint 5	Sprint 6	Sprint 7	Sprint 8	Sprint 9	Sprint 10
	06/02/19 - 19/02/19	20/02/19 - 06/03/19	07/03/19 - 20/03/19	22/03/19 - 03/04/19	04/04/19 - 17/04/19	18/04/19 - 01/05/19	02/05/19 - 15/05/19	16/05/19 - 29/05/19	30/05/19 - 12/06/19	13/06/19 - 26/06/19	27/06/19 - 10/07/19
User type (Persona)	- Contractors 'workers' (internal HMRC staff)	- Contractors 'workers' (internal HMRC staff) - Engagers	Tax/Financial experts & Large orgs	ICEAW/CBI	Engagers/HR/Resourcing/End client	Private sector contractors	Internal HMRC (Tier 2 support)				
Methodology	Contextual inquiry	Inception event	- Round table - Contextual	- Round table - Contextual	- Usability testing - Contextual study	- Usability testing - Contextual study	- User interviews - Contextual usability testing	Usability testing	Usability testing	Usability testing	
Location	Telford office	Canary Wharf	London	Likely London							
Events		Inception Event	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	
Assurance Events							Research, Accessibility & Design			GDS Standards Assessment (Style TBA)	
Products		Product Vision User Needs		Product Backlog							
Development			Google Analytics Audit		Refactoring Dev Resource join scrum	Refactoring			Welsh Language - Deploy	DAC (External Accessibility Testing)	Welsh Language - Deploy

- User Research
- Update Prototype to match live
- Baseline service performance

Thank you

Product Risks

1	<p>Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act.</p> <p>There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.</p>
2	<p>Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and for assurance purposes</p>
3	<p>Deskpro secure email is currently unsupported on a day to day basis</p>
4	<p>We do not understand the supporting end to end business process for the indeterminate outcome e.g. will the existing contract review service be available.</p>

Deskpro



What is it

A helpdesk system used to support users' digital services and problems

How is it accessed

On every page of a digital service there is a link to a secure email service that users can use to report feedback (Beta phase only) and report problems

BETA

This is a new service – your [feedback](#) will help us to improve it.

Continue

[Get help with this page.](#)

Send your feedback

We use your feedback to make our services better.

What do you think of this online service?

- Very good
- Good
- Neutral
- Bad
- Very bad

Name

Email address

Comments

Don't include any personal or financial information. For example, your National Insurance or credit card numbers.

2000 remaining characters

Send

[Get help with this page](#)

Get help using this service

Don't include any personal or financial information. For example, your National Insurance or credit card numbers.

Name

Email

What were you doing?

What do you need help with?

Send

Business Process for transactional services (Live)

Get Help

[Get help with this page.](#)

We have received your message and will reply, or let you know how we are dealing with this, within 2 working days.

User completes templates and receives automated response saying they will receive a reply within 2 working days. It is received by the Digital Centre in Shipley. The problem is triaged.

Tier 1 (Digital Centre Shipley)

“I cannot access” “Where is the guidance” “When do I need to do this”

T1 respond using “snippets” pre-prepared responses, similar to FAQs

If they cannot answer they allocate business issues to T2 and IT problems to T3

Tier 2 (Normally a second line team of business experts e.g. helpline)

“I provide a skateboard is that materials, equipment or a vehicle”

T2 respond using their detailed business knowledge

Tier 3 (Live Service Scrum team)

“Every time I click the @&dy button nothing happens, typical HMRC!!!!”*

T3 raise a bug, investigate and fix.

Business Process for non-transactional services (Live)

Get Help

[Get help with this page.](#)

We have received your message and will reply, or let you know how we are dealing with this, within 2 working days.

User completes templates. The Digital Centre in Shipley do not support non-transactional services as they would add little value because most enquiries are business related.

Tier 1 (Live Service Digital Service Management Team)

“I cannot access” “Where is the guidance” “When do I need to do this”

T1 respond using “snippets” pre-prepared responses, similar to FAQs

If they cannot answer they allocate business issues to T2 and IT problems to T3

Tier 2 (Normally a second line team of business experts e.g. helpline)

“I provide a skateboard is that materials, equipment or a vehicle”

T2 respond using their detailed business knowledge

Tier 3 (Live Service Scrum team)

“Every time I click the @&dy button nothing happens, typical HMRC!!!!”*

T3 raise a bug, investigate and fix.

Check Employment Status for Tax - Sprint Review - 22nd March

PRODUCT VISION

Users

Primary:

- Public sector employers
- Large and medium private sector employers

Secondary:

- Intermediaries and workers may also use the product
- Specific user groups
- Agencies

Needs

How will it meet a user's needs:

- Allow both public and private sector users to correctly administer the worker's payment for tax purposes
- Allow users to be able to answer questions that will give an accurate assessment of a worker's status
- Allow users to easily understand the purpose of the tool, and the next steps
- Allow users to submit feedback
- Allow users who work in specific industries to quickly exit the tool
- Allow users to perform more than one check in a session (not having to start again)
- Allow users to get help using the tool

Goals for this Sprint

Research Focused Objectives

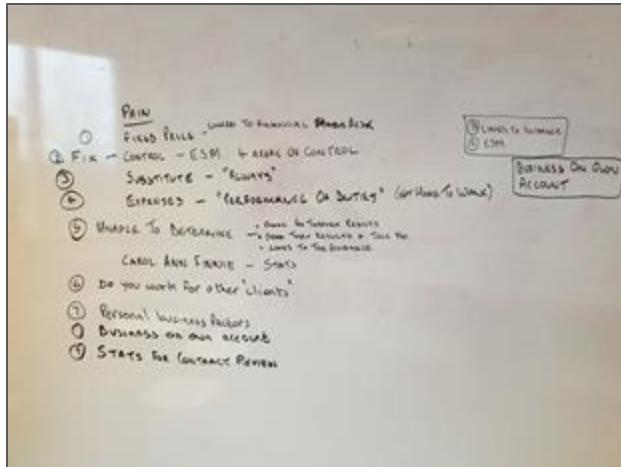
- Findability
 - How does the user find the tool?
- Understanding
 - Language in tool and guidance
- User Expectations
 - Tool and guidance

New research - on going with private sector & discuss with colleagues that speak to the users

Product Management Begin prioritisation based on the product vision and prepare for usability testing

Done during this sprint

Sessions with East Kilbride and Salford



About the people involved

Which of these describes you best?

The end client is the public body, corporation or business that the worker is providing services to.

- The worker
- The end client
- The agency paying the worker
- None of the above

[Continue](#)

Get help with this page.

About the people involved

How does the worker provide their services to the end client?

- As a limited company
- As a partnership
- Through another individual (not an agency)
- As a sole trader

[Continue](#)

Get help with this page.

[Back](#)

About the worker's financial risk

What is the main way the worker is paid for this engagement?

- An hourly, daily or weekly rate
- A fixed price for a specific piece of work
- An amount based on how much work is completed
- A percentage of the sales the worker makes
- A percentage of the end client's profits or savings

[Continue](#)

GOV.UK Check employment status for tax

BETA This is a new service - your feedback will help us to improve it.

[Back](#)

About the work arrangements

Can the end client move the worker to a different task than they originally agreed to do?

This includes moving project or location, or changing to another task at the same location.

- Yes - but only with the worker's agreement
- Yes - without the worker's agreement (if the worker doesn't want to change the end client might end the engagement.)
- No - that would need to be arranged under a new contract or formal agreement

Done during this sprint

Peer reviewed results pages

Not tailored to the user



Done during this sprint

Prototype

Username:

Password:

Personas

Contractor Cath



Bio: Cath is a 32 year old freelance IT contractor. She is happy to take care of herself around the country for work and prefers to take on 3 month contracts. She is concerned about the effects of AI on her work as she wants to learn.

Quote: "I wish they made it easier to understand what they're asking for."

Personality:
Anxious: 10%
Creative: 10%
Open: 10%
Conscientious: 10%
Agreeable: 10%

Profile:
Age: 32
Gender: Female
Occupation: Contractor

Goals:

- To find out if she'll be in or outside of AI?
- To get insight on the most new efficient way.

Pain points:

- Doesn't understand the technology used.
- Confused if plans using the right terms made for her job.
- Wishes on some questions which answers could be applicable for her.

Devices:
PC, Laptop, Smartphone

Digital Inclusion:
10 - Basic digital skills

End client Evan



Bio: Evan is a 38 year old tech manager in a large organization. He is responsible for taking customer requests for both emotional and control value. He is concerned about the upcoming implementation of AI in the public sector and wants to make sure all of the requests he issues are correctly addressed with regard to the best interest of the contract.

Quote: "I wish they could make it easier to understand the value of what they're doing."

Personality:
Anxious: 10%
Creative: 10%
Open: 10%
Conscientious: 10%
Agreeable: 10%

Profile:
Age: 38
Gender: Male
Occupation: Tech manager

Goals:

- To determine whether they are offering you the value of AI?
- To get a determination as quick as possible.

Pain points:

- Doesn't understand the terminology used.
- Concern of the difference between the results he gets for different values.
- Wish some of the call back info are as useful to be correct when determining different contracts.

Devices:
PC, Laptop, Smartphone

Digital Inclusion:
10 - Basic digital skills

Done during this sprint

User Research

- Spoke with 4 different groups (ICAEW industry and tax agent representatives, HSBC and public sector representatives) - discussion around thoughts on current tool (findability, ease of use, terminology, next steps)
- 2 personas have been fleshed out based on research done so far - these will still update and more personas will be built the more user types we speak with
- Findings report will be completed next week once we've had chance as a team to analyse the findings in detail
- Take-away findings from the meetings this sprint
 - Some of the questions are too ambiguous
 - Some answers are too close and hard to differentiate between and could be a mixture of two answers
 - Wording is too subjective and open to interpretation leading to confusion when choosing answers
 - MoO needs to be mentioned/have question(s) about
 - 'Substitution' is causing major issues within the public sector with regards to compliance checks currently being done

Check Employment Status for Tax

Initial Findings and User Hypothesis

What do we know?

Guidance

Off-payroll working rules (IR35) for public authorities

[Set up as self-employed \(a 'sole trader'\): step by step](#)

Working for yourself

Guidance

Off-payroll working through an intermediary (IR35)

Guidance

Check employment status for tax

Employment status

Collection

Employment status: employed or self-employed

Business tax

IR35: working through an intermediary



“I’m thinking of starting my own business.”

“Should I be a business?”

“Should I pay tax?,” “How do I pay tax?”



Business representative looking to recruit someone

Working out if someone is self-employed

Would be classed as an engager



Contractor providing a service to a client



**Contractor providing a service to a client,
through an intermediary**

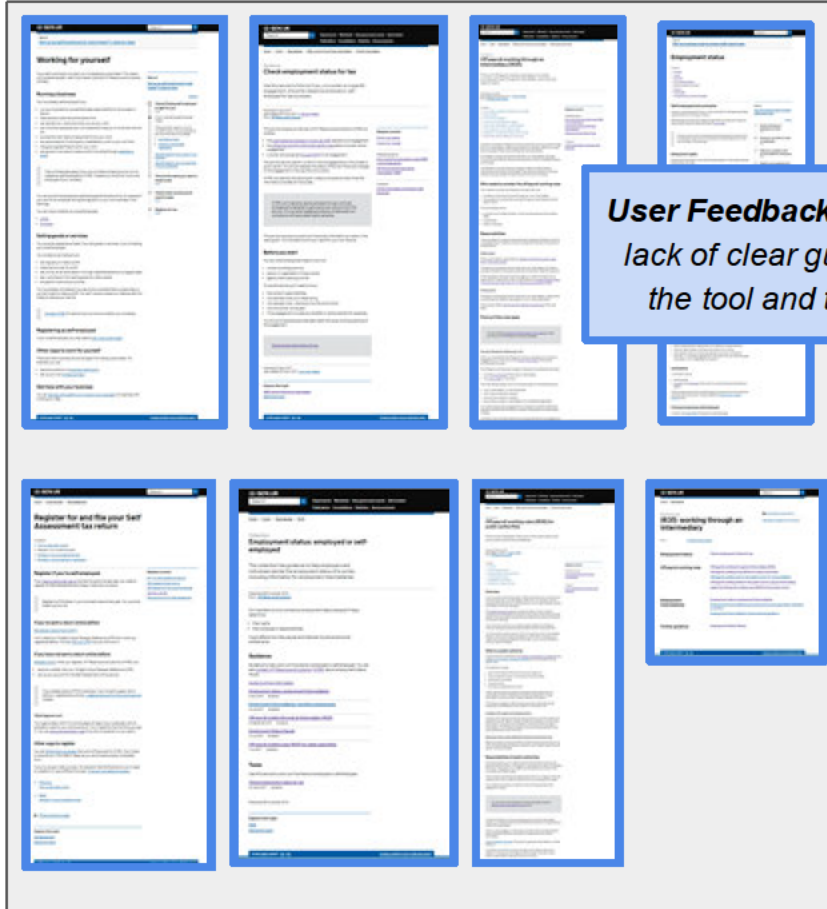


**Public or Private service employing a
worker through intermediary**

Proto Personas

We have identified different user types who may seek to use the Check Employment Status for Tax tool in order to understand their specific situation.

GOV.UK Host Pages for "Check employment status for tax" URL



User Feedback: "There's a lack of clear guidance for the tool and the rules"

As-Is Entry Journey

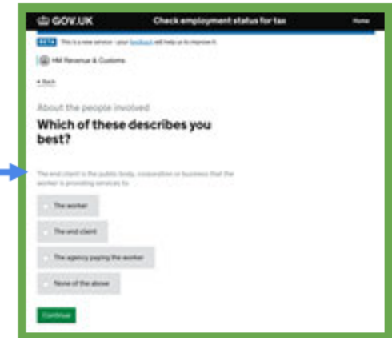
The current Guidance Page for the tool is often not the true start of our User's journey. Different personas will enter the tool from multiple routes, seeking to carry out a task distinct to them

As it stands, the tool assumes all users have a common "task" in mind, whilst also trying to be "all things to all people." The complexity of GOV.UK pages reflects this.

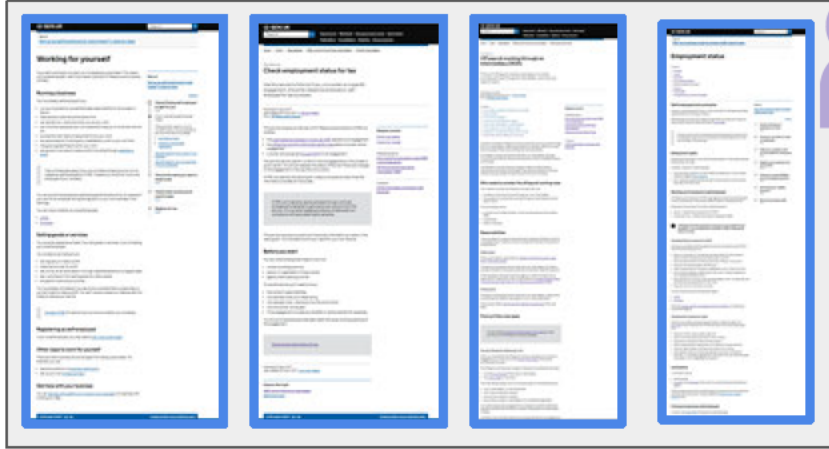
Guidance Page



Tool Start



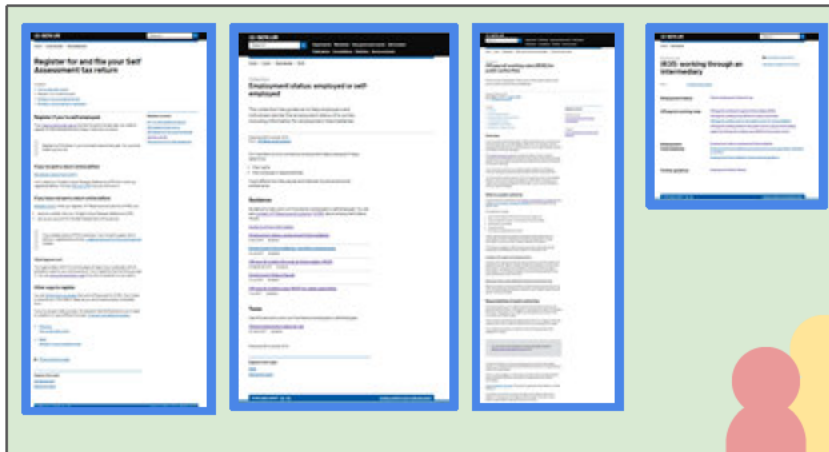
GOV.UK Host Pages for "Check employment status for tax" URL



To-Be Entry Journey

Our hypothesis suggests that information on the current Guidance Page is only useful to some user types, but some is useful to all those seeking to use the tool.

To simplify the user journey and reduce cognitive overload we believe those seeking a decision on being employed or self-employed could be directed straight to the tool or a specific guidance page for them, where they can see a next step directly relevant to their situation.



Guidance Page



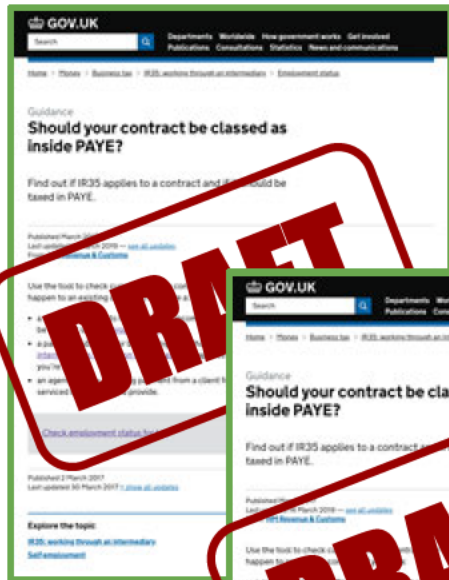
Start Page



Entry Journey Improvements

Changes may include creating two guidance pages which directly link to the tool which cater for the two specific scenarios we believe we have identified: Those wishing to understand if they are employed or self-employed, versus those seeking to understand if a contract sits in or out of IR35.

The initial question in the tool would seek to understand our users task.



“See if I am Self-Employed”
Guidance Page



Updated Initial
Question

Task driven journeys

Currently the tool does not consider the users answer to whether they are a “worker,” “client,” or “agency” to create tailored content or dynamic journeys.

We hypothesise that by understanding the task of our user, we can tailor their journey and ensure only relevant language and questioning is used. We also believe that by understanding the user type early in the journey, we can introduce simplicity throughout subsequent pages and on the results page.

For this page to be effective, we will need to test a number of *assumptions* about our Users.

See next slide for suggested bespoke journey to encourage exit for those not impacted by IR35

Assumption: Users, such as Sole Traders, will know they are operating without an intermediary

Assumption: Users, such as a contractors, will know they have an intermediary

Assumption: These Users, such as Agencies and “fee payers” do not need to use the tool as they are not responsible for determining who is in or out of IR35.

GOV.UK Check employment status for tax

◀ Back

About the people involved

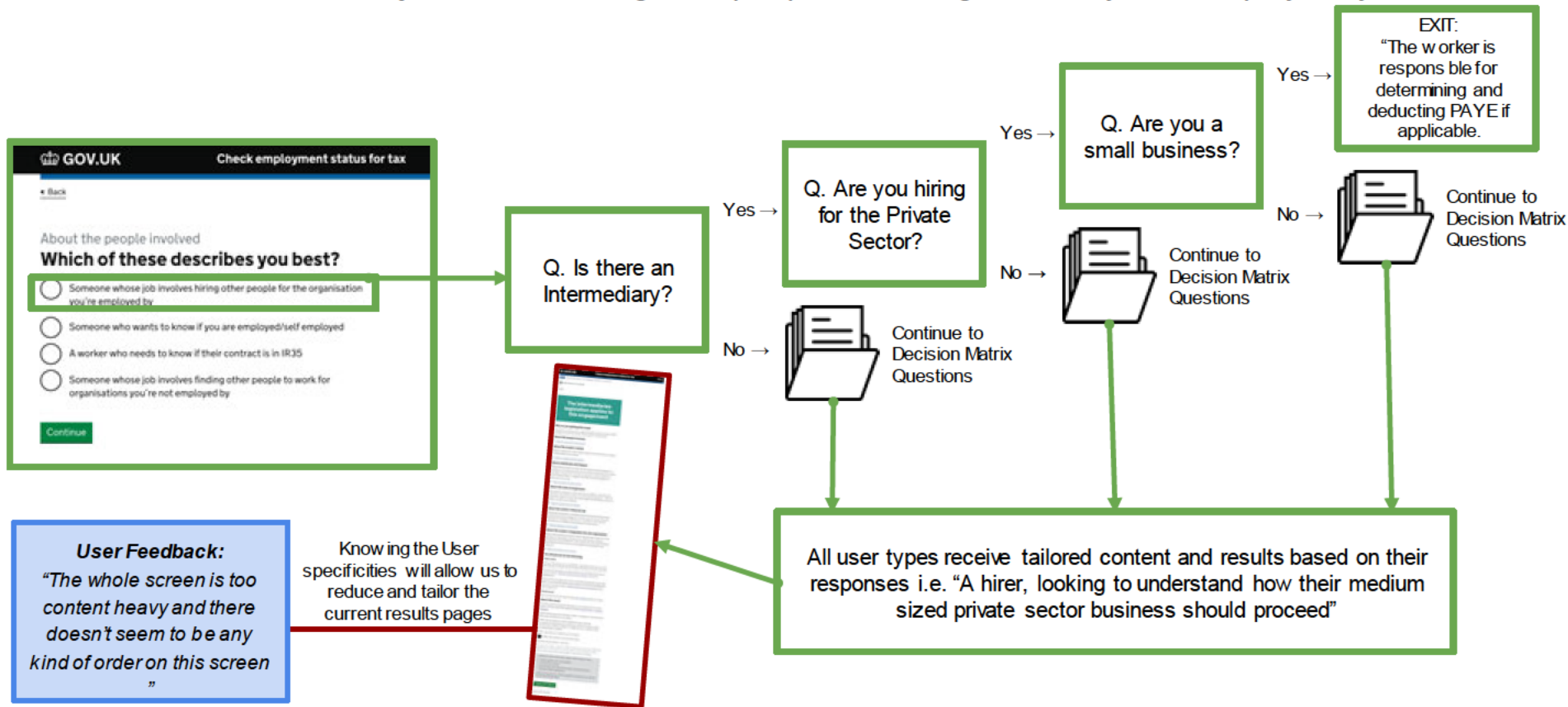
Which of these describes you best?

- Someone whose job involves hiring other people for the organisation you're employed by
- Someone who wants to know if you are employed/self employed
- A worker who needs to know if their contract is in IR35
- Someone whose job involves finding other people to work for organisations you're not employed by

Continue

Example Task Journey:

You are: "Someone whose job involves hiring other people for the organisation you're employed by"



Other User Journey Considerations

By improving the entry journey, and understanding our users types we can potentially address other confusing questions currently being presented to the user, and their positioning in the flow. Such as:

GOV.UK Check employment status for tax Home

BETA This is a new service - your [feedback](#) will help us to improve it.

HM Revenue & Customs

[Back](#)

About the people involved

How does the worker provide their services to the end client?

As a limited company

As a partnership

Through another individual (not an agency)

As a sole trader

[Continue](#)

[Get help with this page.](#)

Currently we believe the purpose of this question is to identify those users who are operating without an intermediary (Sole Traders in this instance) with other answers not impacting anything else in the Users journey. If we already know that our user is seeking to understand if they are employed or self-employed and not interested in IR35, then perhaps this page can be removed or simplified.

Deskpro Top Issue: - *The questions are not clear what they are asking (or who they are for) - 26.67%*

User Feedback: *"The answers do not fit to what the questions are asking"*

What do we propose

Based on our learning, what do we propose

- *Testing the task driven entry points*
- *Start creating in service content that is relevant to the user*
- *Start creating tailored results page*

Next steps

Hold your horses or good to go moment.

Alpha/Beta							
Sprint 3	Sprint 4	Sprint 5	Sprint 6	Sprint 7	Sprint 8	Sprint 9	Sprint 10
21/03/19 - 03/04/19	04/04/19 - 17/04/19	18/04/19 - 01/05/19	02/05/19 - 15/05/19	16/05/19 - 29/05/19	30/05/19 - 12/06/19	13/06/19 - 26/06/19	27/06/19 - 10/07/19
ICEAW/CBI	Engagers/HR/Resourcing/End client	Private sector contractors	Internal HMRC (Tier 2 support)				
- Round table - Contextual	- Usability testing - Contextual study	- Usability testing - Contextual study	- User interviews - Contextual usability testing	Usability testing	Usability testing	Usability testing	
Likely London							
Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	
			Research, Accessibility & Design			GDS Standards Assessment (Style TBA)	
Product Backlog				Engage Gov.uk Content Designer			
Google Analytics Audit	Refactoring Dev Resource join scrum	Refactoring			Welsh Language - Deploy	DAC (External Accesibility Testing)	Welsh Language - Deploy

- User Research
- Updating prototype for usability testing
- On-boarding Dev Team

Thank you

Product Risks

Risk and Issues

Number	Description	Mitigation	Owner	Status
1	<p>Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act.</p> <p>There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.</p>	<p>1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard</p> <p>2 - Store data in an easily accessible format</p> <p>3 - Be as transparent as possible e.g. UAT in GitHub</p>	[REDACTED]	Closed
2	<p>Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>There will be a six week period of support for the new service. There have been a number of iterations in design. We have added a whole new section based on user research.</p>	[REDACTED]	Closed
3	<p>Deskpro secure email is currently unsupported on a day to day basis</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>Customer Service Group have agreed to support the deskpro service.</p>	[REDACTED]	Closed
4	<p>We do not understand the supporting end to end business process for the indeterminate outcome e.g. will the existing contract review service be available.</p> <p>See Assumption No. 2</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p>	[REDACTED]	Closed
5	<p>Gov.uk content designer will not be available until June. There is a risk to the scrum in terms of managing the end to end language, tone and navigation from Gov.uk guidance and then into the tool.</p>	<p>This is mitigated by using a common style guide and [REDACTED] kindly offered to talk if we had any major concerns.</p> <p>Content designer allocated. We have access to Gov.uk content via Sharepoint.</p> <p>Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)</p>	[REDACTED]	Closed

Check Employment Status for Tax - Sprint Review - 8th April

PRODUCT VISION

Users

Primary:

- Public sector employers
- Large and medium private sector employers

Secondary:

- Intermediaries and workers may also use the product
- Specific user groups
- Agencies

Needs

How will it meet a user's needs:

- Allow both public and private sector users to correctly administer the worker's payment for tax purposes
- Allow users to be able to answer questions that will give an accurate assessment of a worker's status
- Allow users to easily understand the purpose of the tool, and the next steps
- Allow users to submit feedback
- Allow users who work in specific industries to quickly exit the tool
- Allow users to perform more than one check in a session (not having to start again)
- Allow users to get help using the tool

Goals for this Sprint

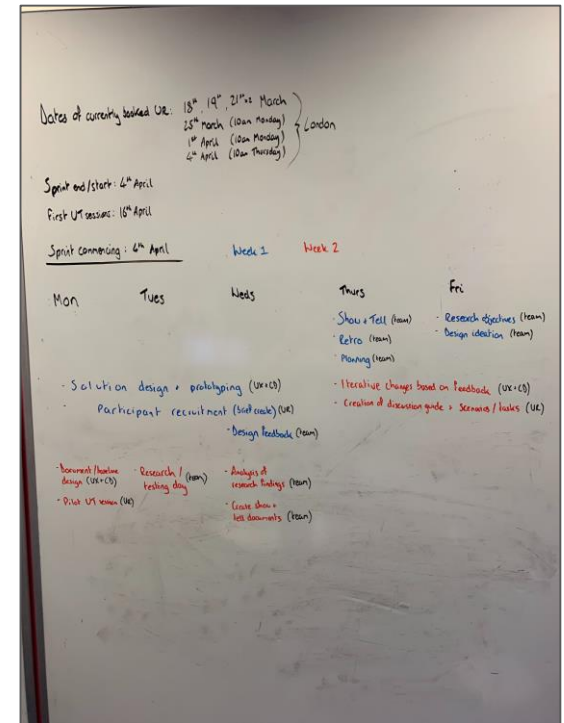
Research Focused Objectives

- Findability
 - How does the user find the tool?
- Understanding
 - Language in tool and guidance
- User Expectations
 - Tool and guidance

New research - 5 sessions of contextual research with the private sector

First round of usability testing

Product Management Begin prioritisation based on the product vision and prepare for usability testing



Done during this sprint

Usability testing

- Task driven entry points
- Tailored results page

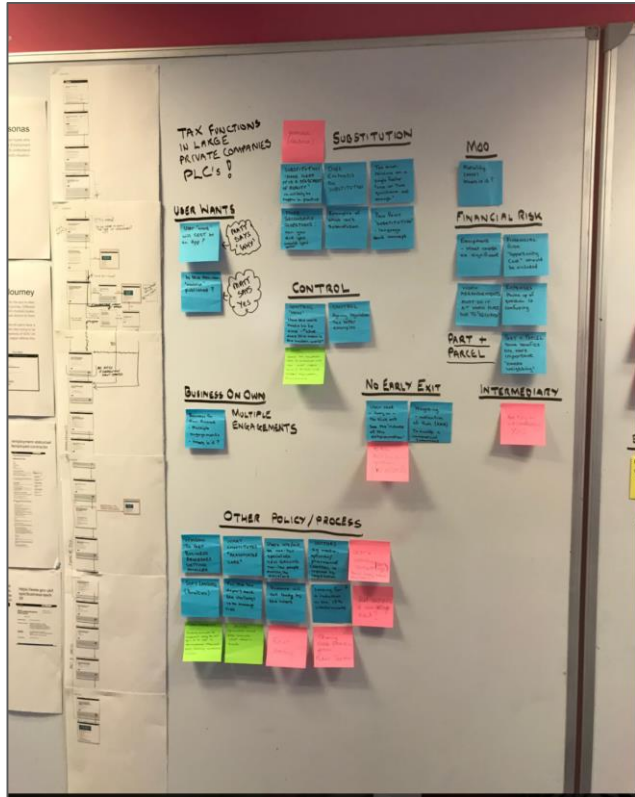
xxx will demonstrate what was taken out:

Username:

Password:

Done during this sprint

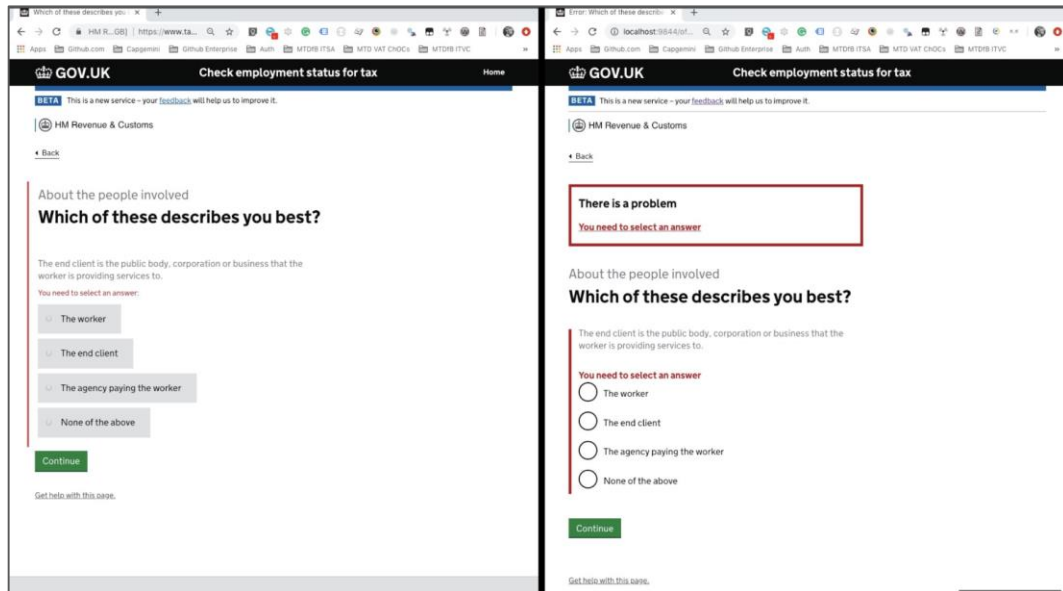
5 rounds of contextual research



Done during this sprint

Started refactoring the code base

Over to xxxx



Done during this sprint

User Research

- Spoke with 5 different groups (xxxx, xxxx, PLCs, xxxx, Agency representatives) - discussion around thoughts on current tool (findability, ease of use, terminology, next steps)
- Usability testing x5 users
 - Not quite the right users but this allowed us to learn that testing needs to be focussed on users that have awareness of CEST and may have used CEST tool before
 - Updates to terminology were well received but this is not based on a comparison as we have no measure from these users as to what their understanding of the previous version was
- Findings report for usability testing will be finalised this week
- Take-away findings from the meetings this sprint (very much the same as the previous round of sessions)
 - Some of the questions are too ambiguous
 - Some answers are too close and hard to differentiate between and could be a mixture of two answers
 - Wording is too subjective and open to interpretation leading to confusion when choosing answers
 - MoO needs to be mentioned/have question(s) about
 - 'Substitution' is causing major issues within the public sector with regards to compliance checks currently being done
 - 'Control' also causing confusion as it does not properly recognise modern day working practices

What do we propose

Based on our learning, what do we propose

- *Continue creating and testing the task driven entry points*
- *Continue creating and testing in service content that is relevant to the user*
- *Continue creating and testing tailored results page*
- *Starting addressing pain points in current content*
- *Face to face to define final high level user stories - MOO etc*
- *Refactoring*

Next steps

Hold your horses or good to go moment.

Alpha/Beta							
Sprint 3	Sprint 4	Sprint 5	Sprint 6	Sprint 7	Sprint 8	Sprint 9	Sprint 10
21/03/19 - 03/04/19	04/04/19 - 17/04/19	18/04/19 - 01/05/19	02/05/19 - 15/05/19	16/05/19 - 29/05/19	30/05/19 - 12/06/19	13/06/19 - 26/06/19	27/06/19 - 10/07/19
ICEAW/CBI	Engagers/HR/Resourcing/End client	Private sector contractors	Internal HMRC (Tier 2 support)				
- Round table - Contextual	- Usability testing - Contextual study	- Usability testing - Contextual study	- User interviews - Contextual usability testing	Usability testing	Usability testing	Usability testing	
Likely London							
Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	
			Research, Accessibility & Design			GDS Standards Assessment (Style TBA)	
Product Backlog				Engage Gov.uk Content Designer			
Google Analytics Audit	Refactoring Dev Resource join scrum	Refactoring			Welsh Language - Deploy	DAC (External Accesibility Testing)	Welsh Language - Deploy

- User Research
- Updating prototype for usability testing
- On-boarding Dev Team

Thank you

Product Risks

Risk and Issues

Number	Description	Mitigation	Owner	Status
1	<p>Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act.</p> <p>There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.</p>	<p>1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard</p> <p>2 - Store data in an easily accessible format</p> <p>3 - Be as transparent as possible e.g. UAT in GitHub</p>	[REDACTED]	Closed
2	<p>Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>There will be a six week period of support for the new service. There have been a number of iterations in design. We have added a whole new section based on user research.</p>	[REDACTED]	Closed
3	<p>Deskpro secure email is currently unsupported on a day to day basis</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>Customer Service Group have agreed to support the deskpro service.</p>	[REDACTED]	Closed
4	<p>We do not understand the supporting end to end business process for the indeterminate outcome e.g. will the existing contract review service be available.</p> <p>See Assumption No. 2</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p>	[REDACTED]	Closed
5	<p>Gov.uk content designer will not be available until June. There is a risk to the scrum in terms of managing the end to end language, tone and navigation from Gov.uk guidance and then into the tool.</p>	<p>This is mitigated by using a common style guide and [REDACTED] kindly offered to talk if we had any major concerns.</p> <p>Content designer allocated. We have access to Gov.uk content via Sharepoint.</p> <p>Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)</p>	[REDACTED]	Closed

Check Employment Status for Tax - Sprint Review - 1st May

PRODUCT VISION

Users

Primary:

- Public sector employers
- Large and medium private sector employers

Secondary:

- Intermediaries and workers may also use the product
- Specific user groups
- Agencies

Needs

How will it meet a user's needs:

- Allow both public and private sector users to correctly administer the worker's payment for tax purposes
- Allow users to be able to answer questions that will give an accurate assessment of a worker's status
- Allow users to easily understand the purpose of the tool, and the next steps
- Allow users to submit feedback
- Allow users who work in specific industries to quickly exit the tool
- Allow users to perform more than one check in a session (not having to start again)
- Allow users to get help using the tool

Goals for this Sprint

- Continue creating and testing the task driven entry points
- Continue creating and testing in service content that is relevant to the user
- Continue creating and testing tailored results page
- Starting addressing pain points in current content
 - personalised tone You and Your And Them
- Complete refactoring

e.g. lack of

Decision and Assumption Logs			
<small>Created by Marc Tyers, last modified just a moment ago</small>			
Number	Decision	Decision Maker	Date
1	Indeterminate answer due to complexity is an acceptable outcome for CEST	Agreed at inception event	20/02/2019
2	Task based approach to entry	Agreed Sprint Review	22/03/2019
3	Tailoring of result page	Agreed Sprint Review	22/03/2019
4	Mutuality of Obligation - there will be no questions on MOO introduced into the digital service. There will be an HMRC paper detailing the HMRC approach to MOO.	Face to Face	10/04/2019
5	Multiple engagements (Business on own account). This will not be directly addressed within the digital service. This is because the some of the users of the service cannot answer the questions.	Face to Face	10/04/2019
6	Tool Structure (reasonable care). Agreed that structure could be changed in response to user needs especially around reasonable care and risk.	Face to Face	10/04/2019
7	Particular occupations. These do not have to be addressed in the digital service.	Face to Face	10/04/2019
Number	Assumption	Date	
1	Discussed with PM/BA on a Skype call 29/04/2019 11:30 - 12:30. CEST 2 is not currently in scope. User need identified is more appropriately met by public facing API.	29/04/2019	
2	Business process for dealing with "indeterminate" response is unchanged. For content purposes.	29/04/2019	

Done during this sprint

Design

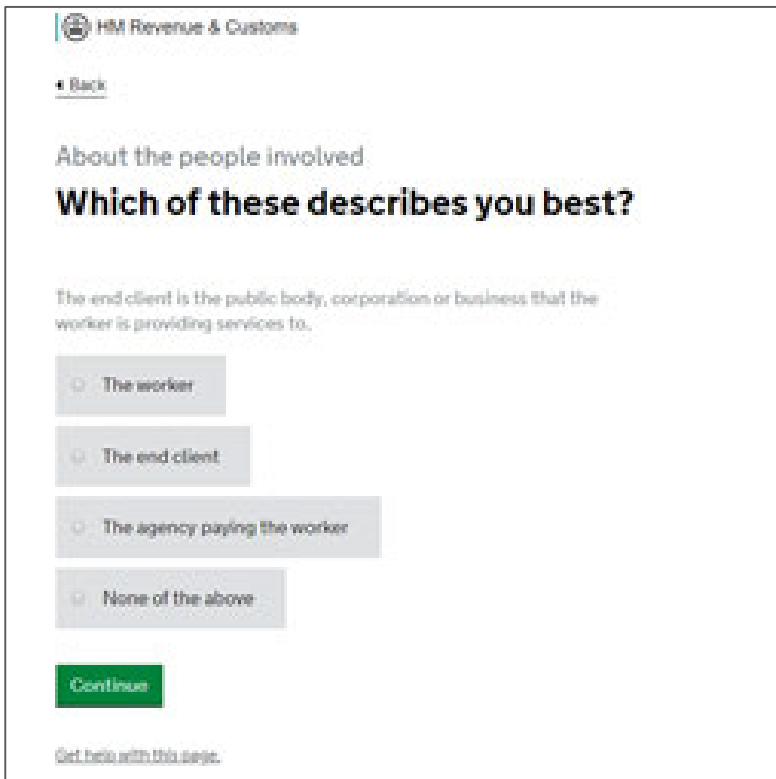
- Task driven entry points
- Tailored results page
- New content throughout

<https://www.prototypes.tax.service.gov.uk/check-employment-status-for-tax-prototype/>

Username: prototypes

Password: redacted

Starting addressing pain points in current content (lack of personalised tone You and Your And Them)



HM Revenue & Customs

[Back](#)

About the people involved

Which of these describes you best?

The end client is the public body, corporation or business that the worker is providing services to.

The worker

The end client

The agency paying the worker

None of the above

[Continue](#)

[@L help with this page.](#)

Out for review/sign off - xxx sent 29/04/2019

Although CEST asks the user who they are (end client, worker etc), it currently ignores the selection made by the user:

We intend to use the decision made by the user on this page to allow tailored content to be displayed.

- If the user chooses “The worker”, the user will see content that is tailored to them.
- If the user chooses “The end client”, the user will see content that is tailored to their organisation.
- If the user chooses “The agency paying the worker”, the user will see the same content that is currently live (this won't be changed).

Note: only the **tone** of the pages will change. The question and answer intent/meaning will remain unchanged.

Optimised Content Screens

Prototype pages - 23rd April 2019
For Round 3 Usability Testing

BETA This is a new service – your [feedback](#) will help us to improve it.

Employed or self-employed? In or out of IR35? Use this tool to find out

This tool has been created for individuals and hirers, to find out who is regarded as self-employed for tax purposes.

And to determine whether a job or contract, and its working conditions (not the individual) is deemed employment and should be taxed at source (PAYE).

Use the tool for current or future roles, in the private or public sector. And to reassess a role's status when its scope, or the way it works, changes.

Please choose answers that most closely describe how the work is done. At the end, you can check and change your answers. Before confirming them to get a result, which you can print or download.

No information, data or results are stored.

Before you start

There are six groups of questions, which are described below. You may want to read this and further guidance about them first.

- ▶ [1: About you](#)
- ▶ [2: The worker's duties](#)
- ▶ [3: People who help or work instead of you](#)
- ▶ [4: The working arrangements](#)
- ▶ [5: The worker's financial risk](#)
- ▶ [6: Working with the hiring company](#)

Start now >

You'll need to know:

- The worker's responsibilities
- Who decides what work needs doing
- Who decides when, where and how the work's done
- How the worker will be paid
- If the engagement includes any benefits or reimbursement for expenses.

Related content

[Employment Status](#)

[Working for yourself](#)

Detailed guidance

[Apply the off-payroll working rules \(IR35\) in the private sector](#)

[The intermediaries legislation \(known as IR35\)](#)

[Off-payroll working in the public sector rules](#)

[Employment status: employed or self-employed](#)

Proposed Guidance
(Out of scope for
scrum team)

About this result Task

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About your result

HMRC will stand by the result given, unless a compliance check finds the information you've provided isn't accurate.

HMRC won't stand by results achieved through contrived arrangements, designed to get a particular outcome from the service. This would be treated as evidence of deliberate non-compliance with associated higher penalties.

[Continue](#)

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

About you

Which of these describes you best?

- I want to find out if I am employed/self-employed
- I want to find out if I need to apply PAYE to someone who is working for me
- I want to find out if a contract I am, or could be, working on falls within IR35
- I want to find out if a contract my organisation is recruiting for falls within IR35
- I want to find out if a contract I'm recruiting for, on behalf of another organisation, falls within IR35

Continue

User Task

“Do I pay them PAYE” question rather than declaration


I want to find out if I need to pay someone who's working for me within PAYE

“I want to find out if I need to apply PAYE to someone who is working for me”

/live_v2/describeYou2

Intermediary

Worker

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

About the people involved


Are you trading through a limited company, partnership or unincorporated body?

Yes No

[Continue](#)

/live_v2/worker/intermediary

Hirer

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

About the people involved

Is the worker trading through a limited company, partnership or unincorporated body?

Yes No

[Continue](#)

/live_v2/hirer/intermediary

Same for worker and hirer

GOV.UK Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)


About the people involved

Is the work for a private sector business?

Yes No

[Continue](#)

Same for worker and hirer

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About the people involved

Does this business have more than:

Only select the options that apply

£10.2 million annual turnover?

£5.1 million on their balance sheet?

50 employees?

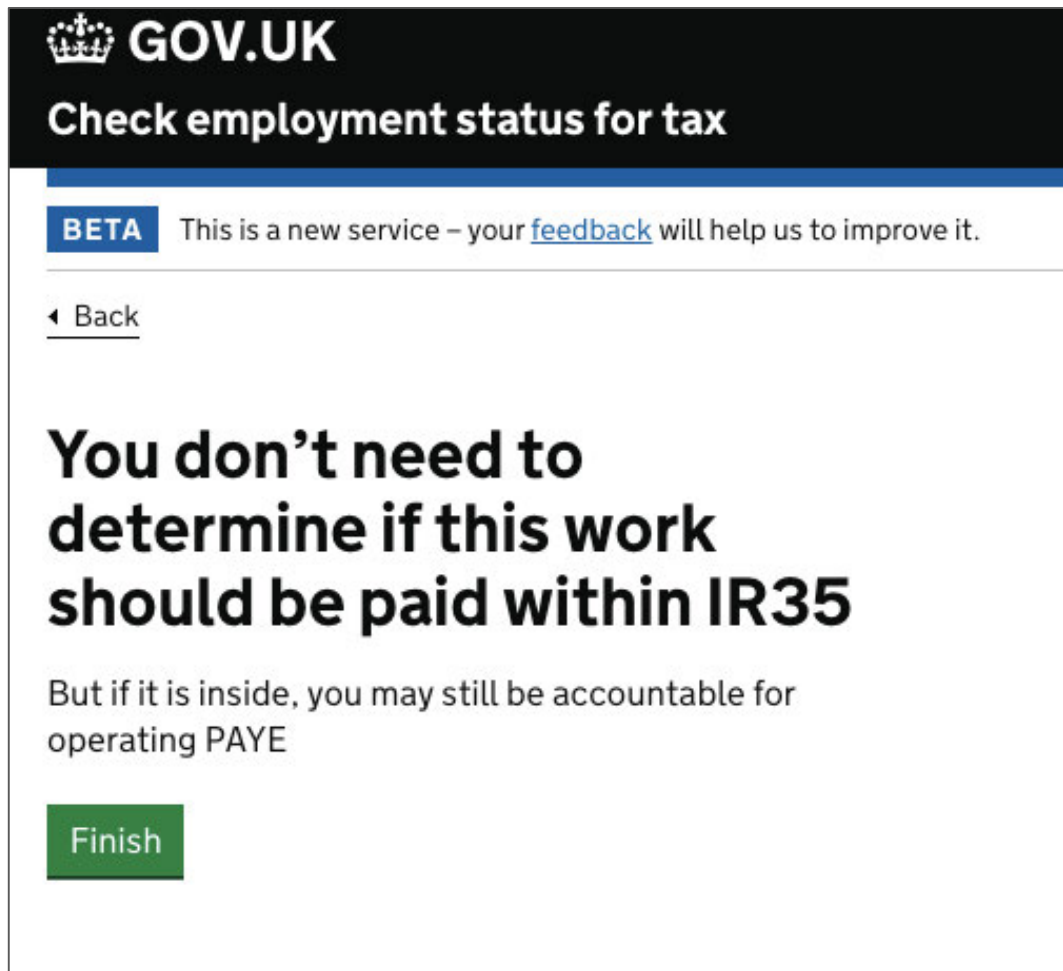
None of the above

[Continue](#)

Advisories and Exits

Agency Exit

Full stops in H2



The screenshot shows a GOV.UK page with a black header containing the crown logo and 'GOV.UK' text. Below the header is a blue bar with the title 'Check employment status for tax'. A blue box with 'BETA' is followed by the text 'This is a new service – your [feedback](#) will help us to improve it.' Below this is a link '◀ Back'. The main content area features a large bold heading: 'You don't need to determine if this work should be paid within IR35'. Underneath is a paragraph: 'But if it is inside, you may still be accountable for operating PAYE'. At the bottom is a green button labeled 'Finish'.

GOV.UK

Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

You don't need to determine if this work should be paid within IR35

But if it is inside, you may still be accountable for operating PAYE

[Finish](#)

M/L Private Sector Business: Exit OR continue

FULL STOPS NEEDED IN
H2

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

You don't need to answer any more questions.

Until April 2020, workers are responsible for determining if roles like this should be in or out of IR35


You can exit the tool now. Or continue through it, to see how other factors determine the employment status of this work and for your future reference

[Finish](#)

[Continue through tool](#)

Public Sector Worker: Exit OR continue

FULL STOPS NEEDED IN
H2

 **GOV.UK**

Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

You don't need to answer any more questions

The organisation offering the work is responsible for determining if it should be in or out of IR35

You can exit the tool now. Or continue through it, to see how other factors determine the employment status of this work for your own records

[Finish](#)

[Continue through tool](#)

Personal Service Section

Engagement Started?

Worker

 **GOV.UK** Check employment status for tax

[◀ Back](#)

About the people involved


Have you already started working for this client?

Yes No

[Continue](#)

/live_v2/worker/contractStarted

Hirer

 **GOV.UK** Check employment status for tax

[◀ Back](#)

About the people involved


Has the worker already started working for your organisation?

Yes No

[Continue](#)

/live_v2/hirer/contractStarted

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

About the worker's duties

Will you ever be required to act for this client, as:

- a board member?
- a treasurer or trustee?
- a company director, company secretary or holder of another official position?

For the purposes of this tool, the 'end client' is the organisation that directly benefits from the work you do.


Yes No

**Does it need this disclosure?
There's no mention of "end client" in the question.**

[Continue](#)

/live_v2/worker/officeHolder3

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

About the worker's duties

Will the worker ever have to act for your organisation, as:


- a board member?
- a treasurer or trustee?
- a company director, company secretary or holder of another official position?

Yes No

[Continue](#)

/live_v2/hirer/officeHolder3

Worker

 Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Have you ever sent someone else to do your work - without this substitute being vetted, cleared or interviewed first?

Yes. It was agreed


Yes. But it was not agreed

No. It hasn't happened

[Continue](#)

/live_v2/worker/substitute

Hirer

 Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Has the worker ever sent someone else to do their work - without this substitute being vetted, cleared or interviewed first?

Yes. It was agreed


Yes. But it was not agreed

No. It hasn't happened

[Continue](#)

/live_v2/hirer/substitute

Worker

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Did you pay your substitute directly?


Yes No

[Continue](#)

/live_v2/worker/substitutePaid

Substitute Paid? (Engagement Started)

Hirer

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers


Did the worker pay their substitute directly?

Yes No

[Continue](#)

/live_v2/hirer/substitutePaid

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Would this client allow you to send someone else to do your work - without your substitute being vetted, cleared or interviewed first?


Yes No

[Continue](#)

/live_v2/worker/ifSubstitute

If Substitute (Engagement NOT Started)

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Would your organisation allow the worker to send someone else to do their work - without this substitute being vetted, cleared or interviewed first?

Yes No


[Continue](#)

/live_v2/hirer/ifSubstitute

If Substitute Paid? (Engagement NOT Started)

Worker

Hirer

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.


[◀ Back](#)

About substitutes and helpers

Would you have to pay your substitute directly?

Yes No

[Continue](#)

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Would the worker have to pay their substitute directly?


Yes No

[Continue](#)

/live_v2/worker/ifSubstitutePaid

/live_v2/hirer/ifSubstitutePaid

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers


Have you paid another person to do a significant amount of this work?

Yes No

[Continue](#)

/live_v2/worker/helper

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Has the worker paid another person to do a significant amount of this work?


Yes No

[Continue](#)

/live_v2/hirer/helper

Control Section

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

The working arrangements

Could your client change your original task, project or location?

Yes. With your agreement


Yes. Without your agreement

No

[Continue](#)

/live_v2/worker/controlTask

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

The working arrangements

Could your people change the worker's original task, project or location?

Yes. With their agreement


Yes. Without their agreement. ← Remove full stop

No

[Continue](#)

/live_v2/hirer/controlTask

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The working arrangements


Will your client specify exactly how they want the work done without your input?

- Yes
- No. You solely decide how the work is done
- No. Because it is highly skilled work
- Partly. Your client and you agree how the work is done

[Continue](#)

/live_v2/worker/controlHow

Hirer




 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The working arrangements

Will your people specify exactly how they want the work done, without the worker's input?


- Yes
- No. The worker solely decides how the work is done. 
- No. Because it is highly skilled work. 
- Partly. Your people and the worker agree how the work will be done. 

[Continue](#)

/live_v2/hirer/controlHow

Remove full stops

Worker

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

The working arrangements

Will your client decide your schedule of working hours?

Yes

No


Partly. Your client and you agree your own schedule

Not applicable. The work is based on agreed deadlines, not a set schedule

[Continue](#)

/live_v2/worker/controlWhen

Hirer

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

The working arrangements

Will your people decide the schedule of working hours?

Yes

No

Partly. Your people and the worker agree their own schedule.


Not applicable. The work is based on agreed deadlines, not a set schedule.

[Continue](#)

Remove full stops

/live_v2/hirer/controlWhen

Worker

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The working arrangements

Will you be able to choose where you work?

Yes

No. Your client decides


No. The task determines the location

Partly. Some work has to be done in an agreed location

[Continue](#)

/live_v2/worker/controlWhere

Hirer

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The working arrangements

Will the worker be able to choose where they work?

Yes

No. Your people decide

No. The task determines the location

Partly. Some work has to be done in an agreed location


[Continue](#)

/live_v2/hirer/controlWhere

Financial Risk Section

Financial Risk 1 of 4: Any Expenses?

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The worker's financial risk


Will you have to provide something to deliver this work at you own cost - that can't be charged or claimed from your end client?

Yes No

[Continue](#)

/live_v2/worker/expenses

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The worker's financial risk

Will the worker have to provide something to deliver this work, at their own cost - that can't be charged or claimed from your organisation?

Yes No

[Continue](#)

/live_v2/hirer/expenses

Financial Risk 2of4: Expense Type

Worker

GOV.UK Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[Back](#)

The worker's financial risk

What will you have to provide at your own cost?

Tick all that apply

- Materials. Substantial items that you can't use in the future or charge to/claim from your client
- Equipment. This does not include personal tablets and phones but can include work-only PCs
- Vehicle. Used for work-only tasks (not commuting) including purchase, fuel and running costs
- Miscellaneous. e.g. significant non-commuting travel or accommodation external business premises, insurance and accreditation costs.

[Continue](#)

←
acomodation,
external business
premises
Remove full stop

/live_v2/worker/expenses2

Hirer

GOV.UK Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[Back](#)

The worker's financial risk

What will the worker provide at their own cost?

Tick all that apply

- Materials. Substantial items that the worker can't use in the future or charge to/claim from you
- Equipment. This does not include personal tablets and phones but can include work-only PCs
- Vehicle. Used for work-only tasks (not commuting) including purchase, fuel and running costs
- Miscellaneous. e.g. significant non-commuting travel or accommodation external business premises, insurance and accreditation costs.


[Continue](#)

←
acomodation,
external business
premises
Remove full stop

/live_v2/hirer/expenses2

Financial Risk 3of4: Pay

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The worker's financial risk


On what basis will you be compensated for this work?

- Time. An hourly, daily or weekly rate
- Price. A fixed amount for a specific project
- Amount. Based on how much work is completed
- Percentage. Of sales you generate
- Percentage. Share of your client's profits or savings

[Continue](#)

/live_v2/worker/pay

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The worker's financial risk

On what basis will the worker be compensated for this work?


- Time. An hourly, daily or weekly rate
- Price. A fixed amount for a specific project
- Amount. Based on how much work is completed
- Percentage. Of sales the worker generates
- Percentage. Share of your organisation's profits or savings

[Continue](#)

/live_v2/hirer/pay

Financial Risk 4of4: Dispute

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

The worker's financial risk


If your client wasn't happy with your work, would you have to put it right at your cost?

- Yes. You would have to put it right, at no additional charge, and would incur extra costs in doing so
- Yes. You would have to put it right, at no additional charge, but would incur an opportunity cost
- No. You would put it right in your usual hours at your usual rate or fee
- No. You couldn't put it right because it was time-specific or for a single event
- No. You wouldn't need to put it right

[Continue](#)

/live_v2/worker/dispute

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

The worker's financial risk

If your team weren't happy with the work, would the worker have to put it right at their cost?

- Yes. The worker would have to put it right, at no additional charge, and would incur extra costs in doing so
- Yes. The worker would have to put it right, at no additional charge, but would incur an opportunity cost
- No. The worker would put it right in their usual hours at their usual rate or fee
- No. The worker couldn't put it right because it was time-specific or for a single event
- No. They wouldn't need to put it right


[Continue](#)

/live_v2/hirer/dispute

Part & Parcel Section

Part & Parcel 1 of 4: Benefits

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company

Will you be entitled to any of these benefits from your client:


- Sick pay
- Holiday pay
- Workplace pension
- Maternity/paternity pay
- Other benefits, like health insurance?

Yes No

[Continue](#)

/live_v2/worker/benefits

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company

Will the worker be entitled to any of these benefits from your organisation:


- Sick pay
- Holiday pay
- Workplace pension
- Maternity/paternity pay
- Other benefits, like health insurance?

Yes No

[Continue](#)

/live_v2/hirer/benefits

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company

Will you be responsible for any of these duties for your client?


- Hiring workers
- Dismissing workers
- Delivering appraisals
- Deciding how much to pay someone

Yes No

[Continue](#)

/live_v2/worker/duties

Part & Parcel 2of4: Duties Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company

Will the worker be responsible for any of these duties for your organisation?

- Hiring workers
- Dismissing staff
- Delivering appraisals
- Deciding staff pay levels


Yes No

[Continue](#)

/live_v2/hirer/duties

Part & Parcel 3of4: Interaction

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company


Will you interact with your client's external customers, audience or users?

Yes No

[Continue](#)

/live_v2/worker/interaction

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company


Will the worker interact with your organisation's external customers, clients, audience or users?

Yes No

[Continue](#)

/live_v2/hirer/interaction

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company

When you interact with your client's external customers, audience or users, how do you introduce yourself?

You work for their organisation


You are an independent worker acting on their behalf

You work for your own business

[Continue](#)

/live_v2/worker/identity

Part & Parcel 4 of 4: Identity Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company

When the worker interacts with your external customers, clients, audience or users, how do they introduce themselves?

They work for your organisation

They are an independent worker acting on your organisation's behalf

They work for their own business

[Continue](#)

/live_v2/hirer/identity

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

Review your answers in each section below

[Open all](#)

1. About you –

Which of these describes you best?	I want to find out if a contract my organisation is recruiting for falls within IR35	Change
Is the worker trading through a limited company, partnership or unincorporated body?		Change
Is the work for a private sector business?	Yes	Change
Does this business have more than £10.2 million annual turnover?	Yes	Change
Does this business have more than £5.1 million on their balance sheet?	No	Change
Does this business have more than 50 employees?	No	Change

2. The worker's duties +

3. People who help or work instead of you +

4. The working arrangements +

5. The worker's financial risk +

6. Working with the hiring company +

Confirm answers to get your result

By submitting your answers, you confirm the information you've provided is, to the best of your knowledge, correct. That it reflects the actual, or expected, working practices of this role. And that if these change, you also accept your result may no longer hold.

[Confirm for result](#)

Check answers

PAYE determination (No Intermediary)

WORKER

Your income from this work should be taxed within PAYE

Why are you getting this result?

Your answers suggest that you should be deemed as employed for tax purposes.

You should now do the following:

Show this to the hirer and request that your earnings from this contract are paid within PAYE.

You can save, print or export a PDF copy of your answers and result for future reference.

[Get a copy of your result](#)

HIRER

You should operate PAYE for this contract.

Why are you getting this result?

Your answers suggest the worker on this contract is deemed employed for tax purposes.

You should now do the following:

Ensure earnings from this contract are paid within PAYE.

You can save, print or export a PDF copy of your answers and result for future reference.

[Get a copy of your result](#)

Result (Inside)

IR35 determination (Intermediaries Legislation)

WORKER

Your income from this contract should be taxed within PAYE.

Why are you getting this result?

Your answers suggest that the intermediaries legislation (IR 35 regulations) applies to this contract. This means you would be deemed as employed for tax purposes for working on it.

You should now do the following:

Show this to the hirer and request that your earnings from this contract are paid within PAYE.

You can save, print or export a PDF copy of your answers and result for future reference.

[Get a copy of your result](#)

HIRER

You should operate PAYE for this contract.

Why are you getting this result?

Your answers suggest that the intermediaries legislation (IR 35 regulations) applies to this contract. This means a contractor working on it is deemed employed for tax purposes.

You should now do the following:

Ensure earnings from this contract are paid within PAYE.

You can save, print or export a PDF copy of your answers and result for future reference.

[Get a copy of your result](#)

PAYE determination (No Intermediary)

WORKER

Add details to this result for your records

Before you download your result, you can enter any information you'd like recorded on it, in the fields below. This is optional and no data will be stored by HMRC.

Your name

Your business's name

Name/project/title of work

Reference (for example, contact or hirer's name and/or date)

Continue

HIRER

Add details to this result for your records

Before you download your result, you can enter any information you'd like recorded on it, in the fields below. This is optional and no data will be stored by HMRC.

Your name

Name of business providing the work

Name/project/title of work

Reference (for example, contact or hirer's name and/or date)

Continue

Customise Result

IR35 determination (Intermediaries Legislation)

WORKER

Add details to this result for your records

Before you download your result, you can enter any information you'd like recorded on it, in the fields below. This is optional and no data will be stored by HMRC.

Your name

Name of end client issuing the contract and/or agency

Name/project/title of contract

Reference (for example, contact or hirer's name and/or date)

Continue

HIRER

Add details to this result for your records

Before you download your result, you can enter any information you'd like recorded on it, in the fields below. This is optional and no data will be stored by HMRC.

Your name

Name of your organisation

Name/project/title of contract

Reference (for example, contact or hirer's name and/or date)

Continue

Done during this sprint

It's a team sport and it is going on today and tomorrow

Pictures redacted

Round 2 Usability
Findings and
Contextual
Research
Findings have
been distributed

Done during this sprint

Development

Refactored code in Staging environment

Wedi'i rwystro

Performance testing



Back Button in browser fixed



Date and time stamp on PDF



Monitoring



What do we propose

Based on our learning, what do we propose

With large and medium private sector users

- *Continue iterating and testing the task driven entry points*
- *Continue iterating and testing in service content that is relevant to the user*
- *Continue iterating and testing tailored results page*
- *Deploy refactored code*
- *Deploy personalised journeys (subject to sign off) in existing service*
- *Deploy Welsh (subject to sign off by Welsh Unit)*

Roadmap

	Pre-Discovery & Discovery		Alpha/Beta									
	Sprint 0	Sprint 1	Sprint 2	Sprint 3	Sprint 4	Sprint 5	Sprint 6	Sprint 7	Sprint 8	Sprint 9	Sprint 10	
	06/02/19 - 19/02/19	20/02/19 - 06/03/19	07/03/19 - 20/03/19	21/03/19 - 03/04/19	04/04/19 - 17/04/19	18/04/19 - 01/05/19	02/05/19 - 15/05/19	16/05/19 - 29/05/19	30/05/19 - 12/06/19	13/06/19 - 26/06/19	27/06/19 - 10/07/19	
User type (Persona)	- Contractors 'workers' (internal HMRC staff)	- Contractors 'workers' (internal HMRC staff) - Engagers	Tax/Financial experts & Large orgs	ICEAW/CBI	Engagers/HR/Resourcing/End client	Private sector contractors	Internal HMRC (Tier 2 support)					
Methodology	Contextual inquiry	Inception event	- Round table - Contextual	- Round table - Contextual	- Usability testing - Contextual study	- Usability testing - Contextual study	- User interviews - Contextual usability testing	Usability testing	Usability testing	Usability testing		
Location	Telford office	Canary Wharf	London	Likely London								
Events		Inception Event	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review		
Assurance Events									Research, Accessibility & Design	GDS Standards Assessment (Style TBA)		
Products		Product Vision User Needs		Product Backlog			Security Risk Assessment	Engage Gov.uk Content Designer				
Design							Iterating	Iterating	Iterating	Iterating	Iterating	
Development				Google Analytics Audit	Refactoring Dev Resource join scrum	Refactoring	Deploy Refactored Code Activate Welsh service Tone correct in existing service	Entry (includes Private Sector)	Exit (Tailored) Welsh Language New Service (extract for translation)	Working arrangement sections	Welsh Language - Deploy DAC (External Accessibility Testing)	

Updates made: Development Lane & Assurance Events

Thank you

Risk and Issues

Number	Description	Mitigation	Owner	Status
1	<p>Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act.</p> <p>There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.</p>	<p>1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard</p> <p>2 - Store data in an easily accessible format</p> <p>3 - Be as transparent as possible e.g. UAT in GitHub</p>	[REDACTED]	Closed
2	<p>Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>There will be a six week period of support for the new service. There have been a number of iterations in design. We have added a whole new section based on user research.</p>	[REDACTED]	Closed
3	<p>Deskpro secure email is currently unsupported on a day to day basis</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>Customer Service Group have agreed to support the deskpro service.</p>	[REDACTED]	Closed
4	<p>We do not understand the supporting end to end business process for the indeterminate outcome e.g. will the existing contract review service be available.</p> <p>See Assumption No. 2</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p>	[REDACTED]	Closed
5	<p>Gov.uk content designer will not be available until June. There is a risk to the scrum in terms of managing the end to end language, tone and navigation from Gov.uk guidance and then into the tool.</p>	<p>This is mitigated by using a common style guide and [REDACTED] kindly offered to talk if we had any major concerns.</p> <p>Content designer allocated. We have access to Gov.uk content via Sharepoint.</p> <p>Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)</p>	[REDACTED]	Closed

Check Employment Status for Tax - Sprint Review - 1st May

PRODUCT VISION

Users

Primary:

- Public sector employers
- Large and medium private sector employers

Secondary:

- Intermediaries and workers may also use the product
- Specific user groups
- Agencies

Needs

How will it meet a user's needs:

- Allow both public and private sector users to correctly administer the worker's payment for tax purposes
- Allow users to be able to answer questions that will give an accurate assessment of a worker's status
- Allow users to easily understand the purpose of the tool, and the next steps
- Allow users to submit feedback
- Allow users who work in specific industries to quickly exit the tool
- Allow users to perform more than one check in a session (not having to start again)
- Allow users to get help using the tool

Goals for this Sprint

- Continue creating and testing the task driven entry points
- Continue creating and testing in service content that is relevant to the user
- Continue creating and testing tailored results page
- Starting addressing pain points in current content
 - personalised tone You and Your And Them
- Complete refactoring

e.g. lack of

Decision and Assumption Logs

Created by Marc Tyers, last modified just a moment ago

Number	Decision	Decision Maker	Date
1	Indeterminate answer due to complexity is an acceptable outcome for CEST	Agreed at inception event	20/02/2019
2	Task based approach to entry	Agreed Sprint Review	22/03/2019
3	Tailoring of result page	Agreed Sprint Review	22/03/2019
4	Mutuality of Obligation - there will be no questions on MOO introduced into the digital service. There will be an HMRC paper detailing the HMRC approach to MOO.	Face to Face	10/04/2019
5	Multiple engagements (Business on own account). This will not be directly addressed within the digital service. This is because the some of the users of the service cannot answer the questions.	Face to Face	10/04/2019
6	Tool Structure (reasonable care). Agreed that structure could be changed in response to user needs especially around reasonable care and risk.	Face to Face	10/04/2019
7	Particular occupations. These do not have to be addressed in the digital service.	Face to Face	10/04/2019

Number	Assumption	Date
1	Discussed with PM/BA on a Skype call 29/04/2019 11:30 - 12:30. CEST 2 is not currently in scope. User need identified is more appropriately met by public facing API.	29/04/2019
2	Business process for dealing with "indeterminate" response is unchanged. For content purposes.	29/04/2019

Done during this sprint

Design

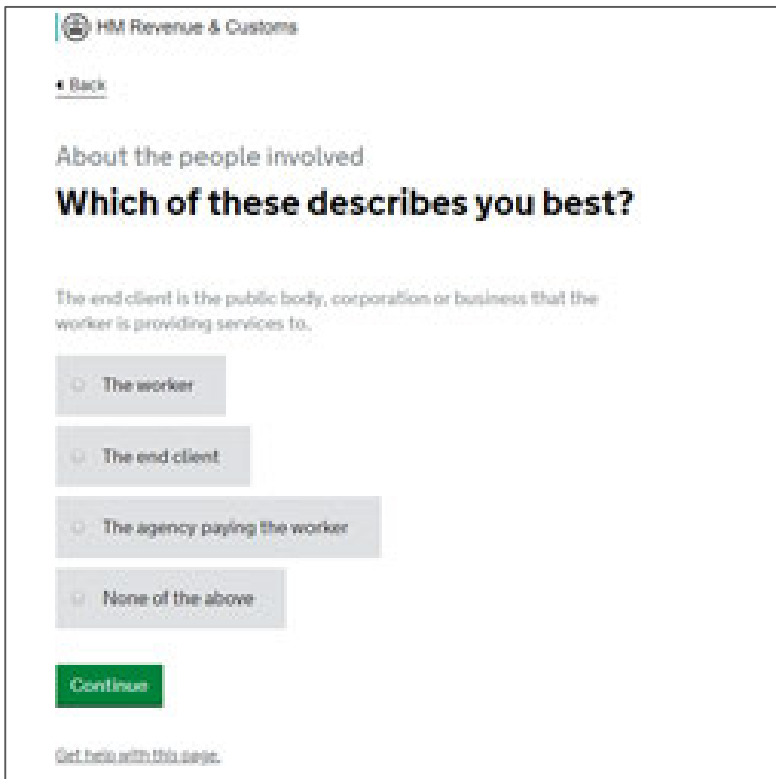
- Task driven entry points
- Tailored results page
- New content throughout

<https://www.prototypes.tax.service.gov.uk/check-employment-status-for-tax-prototype/>

Username: prototypes

Password: redacted

Starting addressing pain points in current content (lack of personalised tone You and Your And Them)



HM Revenue & Customs

[Back](#)

About the people involved

Which of these describes you best?

The end client is the public body, corporation or business that the worker is providing services to.

The worker

The end client

The agency paying the worker

None of the above

[Continue](#)

[Get help with this page.](#)

Out for review/sign off - xxxx sent 29/04/2019

Although CEST asks the user who they are (end client, worker etc), it currently ignores the selection made by the user:

We intend to use the decision made by the user on this page to allow tailored content to be displayed.

- If the user chooses “The worker”, the user will see content that is tailored to them.
- If the user chooses “The end client”, the user will see content that is tailored to their organisation.
- If the user chooses “The agency paying the worker”, the user will see the same content that is currently live (this won't be changed).

Note: only the **tone** of the pages will change. The question and answer intent/meaning will remain unchanged.

Optimised Content Screens

Prototype pages - 23rd April 2019
For Round 3 Usability Testing

BETA This is a new service – your [feedback](#) will help us to improve it.

Employed or self-employed? In or out of IR35? Use this tool to find out

This tool has been created for individuals and hirers, to find out who is regarded as self-employed for tax purposes.

And to determine whether a job or contract, and its working conditions (not the individual) is deemed employment and should be taxed at source (PAYE).

Use the tool for current or future roles, in the private or public sector. And to reassess a role's status when its scope, or the way it works, changes.

Please choose answers that most closely describe how the work is done. At the end, you can check and change your answers. Before confirming them to get a result, which you can print or download.

No information, data or results are stored.

Before you start

There are six groups of questions, which are described below. You may want to read this and further guidance about them first.

- ▶ [1: About you](#)
- ▶ [2: The worker's duties](#)
- ▶ [3: People who help or work instead of you](#)
- ▶ [4: The working arrangements](#)
- ▶ [5: The worker's financial risk](#)
- ▶ [6: Working with the hiring company](#)

Start now >

You'll need to know:

- The worker's responsibilities
- Who decides what work needs doing
- Who decides when, where and how the work's done
- How the worker will be paid
- If the engagement includes any benefits or reimbursement for expenses.

Related content

[Employment Status](#)

[Working for yourself](#)

Detailed guidance

[Apply the off-payroll working rules \(IR35\) in the private sector](#)

[The intermediaries legislation \(known as IR35\)](#)

[Off-payroll working in the public sector rules](#)

[Employment status: employed or self-employed](#)

Proposed Guidance (Out of scope for scrum team)

About this result Task

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About your result

HMRC will stand by the result given, unless a compliance check finds the information you've provided isn't accurate.

HMRC won't stand by results achieved through contrived arrangements, designed to get a particular outcome from the service. This would be treated as evidence of deliberate non-compliance with associated higher penalties.

[Continue](#)

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

About you

Which of these describes you best?

- I want to find out if I am employed/self-employed
- I want to find out if I need to apply PAYE to someone who is working for me
- I want to find out if a contract I am, or could be, working on falls within IR35
- I want to find out if a contract my organisation is recruiting for falls within IR35
- I want to find out if a contract I'm recruiting for, on behalf of another organisation, falls within IR35

Continue

User Task

“Do I pay them PAYE” question rather than declaration


I want to find out if I need to pay someone who's working for me within PAYE

“I want to find out if I need to apply PAYE to someone who is working for me”

/live_v2/describeYou2

Intermediary

Worker

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

About the people involved


Are you trading through a limited company, partnership or unincorporated body?

Yes No

[Continue](#)

/live_v2/worker/intermediary

Hirer

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

About the people involved

Is the worker trading through a limited company, partnership or unincorporated body?

Yes No

[Continue](#)

/live_v2/hirer/intermediary

Same for worker and hirer

GOV.UK Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)


About the people involved

Is the work for a private sector business?

Yes No

[Continue](#)

Same for worker and hirer

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About the people involved

Does this business have more than:

Only select the options that apply

£10.2 million annual turnover?

£5.1 million on their balance sheet?

50 employees?

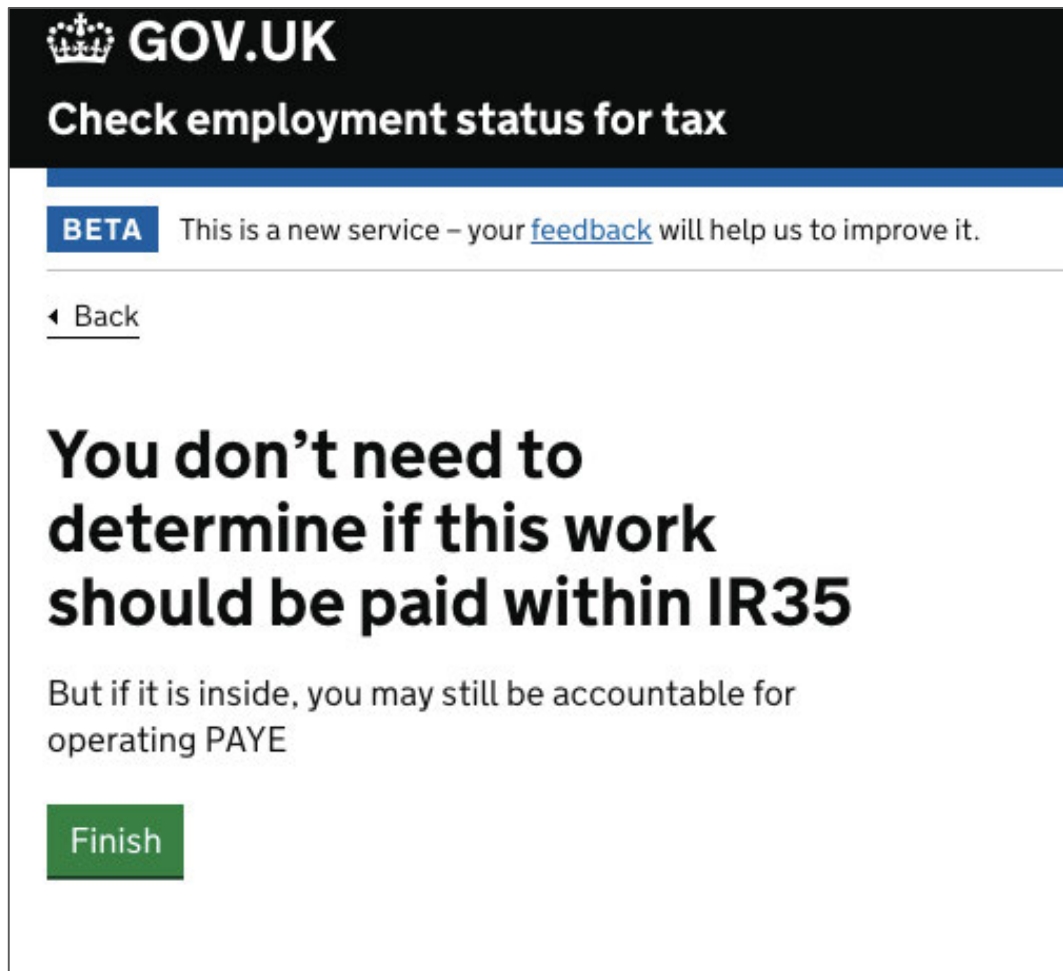
None of the above

[Continue](#)

Advisories and Exits

Agency Exit

Full stops in H2



The screenshot shows a GOV.UK page with a black header containing the crown logo and 'GOV.UK' text. Below the header is a blue bar with the title 'Check employment status for tax'. A blue box labeled 'BETA' is followed by the text 'This is a new service – your [feedback](#) will help us to improve it.' Below this is a link '◀ Back'. The main content area features a large heading: 'You don't need to determine if this work should be paid within IR35'. Underneath is a paragraph: 'But if it is inside, you may still be accountable for operating PAYE'. At the bottom is a green button labeled 'Finish'.

GOV.UK

Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

You don't need to determine if this work should be paid within IR35

But if it is inside, you may still be accountable for operating PAYE

Finish

M/L Private Sector Business: Exit OR continue

FULL STOPS NEEDED IN
H2

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

You don't need to answer any more questions.

Until April 2020, workers are responsible for determining if roles like this should be in or out of IR35


You can exit the tool now. Or continue through it, to see how other factors determine the employment status of this work and for your future reference

[Finish](#)

[Continue through tool](#)

Public Sector Worker: Exit OR continue

FULL STOPS NEEDED IN
H2

 **GOV.UK**

Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

You don't need to answer any more questions

The organisation offering the work is responsible for determining if it should be in or out of IR35

You can exit the tool now. Or continue through it, to see how other factors determine the employment status of this work for your own records


[Finish](#)

[Continue through tool](#)

Personal Service Section

Engagement Started?

Worker

 **GOV.UK** Check employment status for tax

[◀ Back](#)

About the people involved


Have you already started working for this client?

Yes No

[Continue](#)

/live_v2/worker/contractStarted

Hirer

 **GOV.UK** Check employment status for tax

[◀ Back](#)

About the people involved


Has the worker already started working for your organisation?

Yes No

[Continue](#)

/live_v2/hirer/contractStarted

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

About the worker's duties

Will you ever be required to act for this client, as:

- a board member?
- a treasurer or trustee?
- a company director, company secretary or holder of another official position?

For the purposes of this tool, the 'end client' is the organisation that directly benefits from the work you do.


Yes No

**Does it need this disclosure?
There's no mention of "end client" in the question.**

[Continue](#)

/live_v2/worker/officeHolder3

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

About the worker's duties

Will the worker ever have to act for your organisation, as:


- a board member?
- a treasurer or trustee?
- a company director, company secretary or holder of another official position?

Yes No

[Continue](#)

/live_v2/hirer/officeHolder3

Worker

 Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Have you ever sent someone else to do your work - without this substitute being vetted, cleared or interviewed first?

Yes. It was agreed


Yes. But it was not agreed

No. It hasn't happened

[Continue](#)

/live_v2/worker/substitute

Hirer

 Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Has the worker ever sent someone else to do their work - without this substitute being vetted, cleared or interviewed first?

Yes. It was agreed


Yes. But it was not agreed

No. It hasn't happened

[Continue](#)

/live_v2/hirer/substitute

Worker

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Did you pay your substitute directly?


Yes No

[Continue](#)

/live_v2/worker/substitutePaid

Substitute Paid? (Engagement Started)

Hirer

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers


Did the worker pay their substitute directly?

Yes No

[Continue](#)

/live_v2/hirer/substitutePaid

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Would this client allow you to send someone else to do your work - without your substitute being vetted, cleared or interviewed first?


Yes No

[Continue](#)

/live_v2/worker/ifSubstitute

If Substitute (Engagement NOT Started)

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Would your organisation allow the worker to send someone else to do their work - without this substitute being vetted, cleared or interviewed first?

Yes No


[Continue](#)

/live_v2/hirer/ifSubstitute

If Substitute Paid? (Engagement NOT Started)

Worker

Hirer

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.


[◀ Back](#)

About substitutes and helpers

Would you have to pay your substitute directly?

Yes No

[Continue](#)

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Would the worker have to pay their substitute directly?


Yes No

[Continue](#)

/live_v2/worker/ifSubstitutePaid

/live_v2/hirer/ifSubstitutePaid

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers


Have you paid another person to do a significant amount of this work?

Yes No

[Continue](#)

/live_v2/worker/helper

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Has the worker paid another person to do a significant amount of this work?


Yes No

[Continue](#)

/live_v2/hirer/helper

Control Section

Worker

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

The working arrangements

Could your client change your original task, project or location?

Yes. With your agreement


Yes. Without your agreement

No

[Continue](#)

/live_v2/worker/controlTask

Hirer

 **Check employment status for tax**


BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

The working arrangements

Could your people change the worker's original task, project or location?

Yes. With their agreement


Yes. Without their agreement.  Remove full stop

No

[Continue](#)

/live_v2/hirer/controlTask

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The working arrangements


Will your client specify exactly how they want the work done without your input?

- Yes
- No. You solely decide how the work is done
- No. Because it is highly skilled work
- Partly. Your client and you agree how the work is done

[Continue](#)

/live_v2/worker/controlHow

Hirer




 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The working arrangements

Will your people specify exactly how they want the work done, without the worker's input?


- Yes
- No. The worker solely decides how the work is done. 
- No. Because it is highly skilled work. 
- Partly. Your people and the worker agree how the work will be done. 

[Continue](#)

/live_v2/hirer/controlHow

Remove full stops

Worker

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

The working arrangements

Will your client decide your schedule of working hours?

Yes

No


Partly. Your client and you agree your own schedule

Not applicable. The work is based on agreed deadlines, not a set schedule

[Continue](#)

/live_v2/worker/controlWhen

Hirer

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

The working arrangements

Will your people decide the schedule of working hours?

Yes

No

Partly. Your people and the worker agree their own schedule.


Not applicable. The work is based on agreed deadlines, not a set schedule.

[Continue](#)

Remove full stops

/live_v2/hirer/controlWhen

Worker

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The working arrangements

Will you be able to choose where you work?

Yes

No. Your client decides


No. The task determines the location

Partly. Some work has to be done in an agreed location

[Continue](#)

/live_v2/worker/controlWhere

Hirer

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The working arrangements

Will the worker be able to choose where they work?

Yes

No. Your people decide

No. The task determines the location

Partly. Some work has to be done in an agreed location


[Continue](#)

/live_v2/hirer/controlWhere

Financial Risk Section

Financial Risk 1 of 4: Any Expenses?

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The worker's financial risk


Will you have to provide something to deliver this work at you own cost - that can't be charged or claimed from your end client?

Yes No

[Continue](#)

/live_v2/worker/expenses

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The worker's financial risk

Will the worker have to provide something to deliver this work, at their own cost - that can't be charged or claimed from your organisation?

Yes No

[Continue](#)

/live_v2/hirer/expenses

Financial Risk 2of4: Expense Type

Worker

GOV.UK Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[Back](#)

The worker's financial risk

What will you have to provide at your own cost?

Tick all that apply

- Materials. Substantial items that you can't use in the future or charge to/claim from your client
- Equipment. This does not include personal tablets and phones but can include work-only PCs
- Vehicle. Used for work-only tasks (not commuting) including purchase, fuel and running costs
- Miscellaneous. e.g. significant non-commuting travel or accommodation external business premises, insurance and accreditation costs.

[Continue](#)

←
acomodation,
external business
premises
Remove full stop

/live_v2/worker/expenses2

Hirer

GOV.UK Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[Back](#)

The worker's financial risk

What will the worker provide at their own cost?

Tick all that apply

- Materials. Substantial items that the worker can't use in the future or charge to/claim from you
- Equipment. This does not include personal tablets and phones but can include work-only PCs
- Vehicle. Used for work-only tasks (not commuting) including purchase, fuel and running costs
- Miscellaneous. e.g. significant non-commuting travel or accommodation external business premises, insurance and accreditation costs.


[Continue](#)

←
acomodation,
external business
premises
Remove full stop

/live_v2/hirer/expenses2

Financial Risk 3of4: Pay

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The worker's financial risk


On what basis will you be compensated for this work?

- Time. An hourly, daily or weekly rate
- Price. A fixed amount for a specific project
- Amount. Based on how much work is completed
- Percentage. Of sales you generate
- Percentage. Share of your client's profits or savings

[Continue](#)

/live_v2/worker/pay

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The worker's financial risk

On what basis will the worker be compensated for this work?


- Time. An hourly, daily or weekly rate
- Price. A fixed amount for a specific project
- Amount. Based on how much work is completed
- Percentage. Of sales the worker generates
- Percentage. Share of your organisation's profits or savings

[Continue](#)

/live_v2/hirer/pay

Financial Risk 4of4: Dispute

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

The worker's financial risk


If your client wasn't happy with your work, would you have to put it right at your cost?

- Yes. You would have to put it right, at no additional charge, and would incur extra costs in doing so
- Yes. You would have to put it right, at no additional charge, but would incur an opportunity cost
- No. You would put it right in your usual hours at your usual rate or fee
- No. You couldn't put it right because it was time-specific or for a single event
- No. You wouldn't need to put it right

[Continue](#)

/live_v2/worker/dispute

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

The worker's financial risk

If your team weren't happy with the work, would the worker have to put it right at their cost?

- Yes. The worker would have to put it right, at no additional charge, and would incur extra costs in doing so
- Yes. The worker would have to put it right, at no additional charge, but would incur an opportunity cost
- No. The worker would put it right in their usual hours at their usual rate or fee
- No. The worker couldn't put it right because it was time-specific or for a single event
- No. They wouldn't need to put it right


[Continue](#)

/live_v2/hirer/dispute

Part & Parcel Section

Part & Parcel 1 of 4: Benefits

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company

Will you be entitled to any of these benefits from your client:


- Sick pay
- Holiday pay
- Workplace pension
- Maternity/paternity pay
- Other benefits, like health insurance?

Yes No

[Continue](#)

/live_v2/worker/benefits

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company

Will the worker be entitled to any of these benefits from your organisation:


- Sick pay
- Holiday pay
- Workplace pension
- Maternity/paternity pay
- Other benefits, like health insurance?

Yes No

[Continue](#)

/live_v2/hirer/benefits

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company

Will you be responsible for any of these duties for your client?


- Hiring workers
- Dismissing workers
- Delivering appraisals
- Deciding how much to pay someone

Yes No

[Continue](#)

/live_v2/worker/duties

Part & Parcel 2of4: Duties Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company

Will the worker be responsible for any of these duties for your organisation?

- Hiring workers
- Dismissing staff
- Delivering appraisals
- Deciding staff pay levels


Yes No

[Continue](#)

/live_v2/hirer/duties

Part & Parcel 3of4: Interaction

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company


Will you interact with your client's external customers, audience or users?

Yes No

[Continue](#)

/live_v2/worker/interaction

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company


Will the worker interact with your organisation's external customers, clients, audience or users?

Yes No

[Continue](#)

/live_v2/hirer/interaction

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company

When you interact with your client's external customers, audience or users, how do you introduce yourself?

You work for their organisation


You are an independent worker acting on their behalf

You work for your own business

[Continue](#)

/live_v2/worker/identity

Part & Parcel 4 of 4: Identity Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company

When the worker interacts with your external customers, clients, audience or users, how do they introduce themselves?

They work for your organisation

They are an independent worker acting on your organisation's behalf

They work for their own business

[Continue](#)

/live_v2/hirer/identity

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

Review your answers in each section below

[Open all](#)

1. About you –

Which of these describes you best?	I want to find out if a contract my organisation is recruiting for falls within IR35	Change
Is the worker trading through a limited company, partnership or unincorporated body?		Change
Is the work for a private sector business?	Yes	Change
Does this business have more than £10.2 million annual turnover?	Yes	Change
Does this business have more than £5.1 million on their balance sheet?	No	Change
Does this business have more than 50 employees?	No	Change

2. The worker's duties +

3. People who help or work instead of you +

4. The working arrangements +

5. The worker's financial risk +

6. Working with the hiring company +

Confirm answers to get your result

By submitting your answers, you confirm the information you've provided is, to the best of your knowledge, correct. That it reflects the actual, or expected, working practices of this role. And that if these change, you also accept your result may no longer hold.

[Confirm for result](#)

Check answers

PAYE determination (No Intermediary)

WORKER

Your income from this work should be taxed within PAYE

Why are you getting this result?

Your answers suggest that you should be deemed as employed for tax purposes.

You should now do the following:

Show this to the hirer and request that your earnings from this contract are paid within PAYE.

You can save, print or export a PDF copy of your answers and result for future reference.

[Get a copy of your result](#)

HIRER

You should operate PAYE for this contract.

Why are you getting this result?

Your answers suggest the worker on this contract is deemed employed for tax purposes.

You should now do the following:

Ensure earnings from this contract are paid within PAYE.

You can save, print or export a PDF copy of your answers and result for future reference.

[Get a copy of your result](#)

Result (Inside)

IR35 determination (Intermediaries Legislation)

WORKER

Your income from this contract should be taxed within PAYE.

Why are you getting this result?

Your answers suggest that the intermediaries legislation (IR 35 regulations) applies to this contract. This means you would be deemed as employed for tax purposes for working on it.

You should now do the following:

Show this to the hirer and request that your earnings from this contract are paid within PAYE.

You can save, print or export a PDF copy of your answers and result for future reference.

[Get a copy of your result](#)

HIRER

You should operate PAYE for this contract.

Why are you getting this result?

Your answers suggest that the intermediaries legislation (IR 35 regulations) applies to this contract. This means a contractor working on it is deemed employed for tax purposes.

You should now do the following:

Ensure earnings from this contract are paid within PAYE.

You can save, print or export a PDF copy of your answers and result for future reference.

[Get a copy of your result](#)

PAYE determination (No Intermediary)

WORKER

Add details to this result for your records

Before you download your result, you can enter any information you'd like recorded on it, in the fields below. This is optional and no data will be stored by HMRC.

Your name

Your business's name

Name/project/title of work

Reference (for example, contact or hirer's name and/or date)

Continue

HIRER

Add details to this result for your records

Before you download your result, you can enter any information you'd like recorded on it, in the fields below. This is optional and no data will be stored by HMRC.

Your name

Name of business providing the work

Name/project/title of work

Reference (for example, contact or hirer's name and/or date)

Continue

Customise Result

IR35 determination (Intermediaries Legislation)

WORKER

Add details to this result for your records

Before you download your result, you can enter any information you'd like recorded on it, in the fields below. This is optional and no data will be stored by HMRC.

Your name

Name of end client issuing the contract and/or agency

Name/project/title of contract

Reference (for example, contact or hirer's name and/or date)

Continue

HIRER

Add details to this result for your records

Before you download your result, you can enter any information you'd like recorded on it, in the fields below. This is optional and no data will be stored by HMRC.

Your name

Name of your organisation

Name/project/title of contract

Reference (for example, contact or hirer's name and/or date)

Continue

Done during this sprint

It's a team sport and it is going on today and tomorrow

Pictures redacted

Round 2 Usability
Findings and
Contextual
Research
Findings have
been distributed

Done during this sprint

Development

Refactored code in Staging environment

Wedi'i rwystro

Performance testing



Back Button in browser fixed



Date and time stamp on PDF



Monitoring



Over to Wayne

What do we propose

Based on our learning, what do we propose

With large and medium private sector users

- *Continue iterating and testing the task driven entry points*
- *Continue iterating and testing in service content that is relevant to the user*
- *Continue iterating and testing tailored results page*
- *Deploy refactored code*
- *Deploy personalised journeys (subject to sign off) in existing service*
- *Deploy Welsh (subject to sign off by Welsh Unit)*

Roadmap

	Pre-Discovery & Discovery		Alpha/Beta									
	Sprint 0	Sprint 1	Sprint 2	Sprint 3	Sprint 4	Sprint 5	Sprint 6	Sprint 7	Sprint 8	Sprint 9	Sprint 10	
	06/02/19 - 19/02/19	20/02/19 - 06/03/19	07/03/19 - 20/03/19	21/03/19 - 03/04/19	04/04/19 - 17/04/19	18/04/19 - 01/05/19	02/05/19 - 15/05/19	16/05/19 - 29/05/19	30/05/19 - 12/06/19	13/06/19 - 26/06/19	27/06/19 - 10/07/19	
User type (Persona)	- Contractors 'workers' (internal HMRC staff)	- Contractors 'workers' (internal HMRC staff) - Engagers	Tax/Financial experts & Large orgs	ICEAW/CBI	Engagers/HR/Resourcing/End client	Private sector contractors	Internal HMRC (Tier 2 support)					
Methodology	Contextual inquiry	Inception event	- Round table - Contextual	- Round table - Contextual	- Usability testing - Contextual study	- Usability testing - Contextual study	- User interviews - Contextual usability testing	Usability testing	Usability testing	Usability testing		
Location	Telford office	Canary Wharf	London	Likely London								
Events		Inception Event	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review		
Assurance Events									Research, Accessibility & Design	GDS Standards Assessment (Style TBA)		
Products		Product Vision User Needs		Product Backlog			Security Risk Assessment	Engage Gov.uk Content Designer				
Design							Iterating	Iterating	Iterating	Iterating	Iterating	
Development				Google Analytics Audit	Refactoring Dev Resource join scrum	Refactoring	Deploy Refactored Code Activate Welsh service Tone correct in existing service	Entry (includes Private Sector)	Exit (Tailored) Welsh Language New Service (extract for translation)	Working arrangement sections	Welsh Language - Deploy DAC (External Accessibility Testing)	

Updates made: Development Lane & Assurance Events

Thank you

Risk and Issues

Number	Description	Mitigation	Owner	Status
1	<p>Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act.</p> <p>There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.</p>	<p>1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard</p> <p>2 - Store data in an easily accessible format</p> <p>3 - Be as transparent as possible e.g. UAT in GitHub</p>		Closed
2	<p>Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>There will be a six week period of support for the new service. There have been a number of iterations in design. We have added a whole new section based on user research.</p>		Closed
3	<p>Deskpro secure email is currently unsupported on a day to day basis</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>Customer Service Group have agreed to support the deskpro service.</p>		Closed
4	<p>We do not understand the supporting end to end business process for the indeterminate outcome e.g. will the existing contract review service be available.</p> <p>See Assumption No. 2</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p>		Closed
5	<p>Gov.uk content designer will not be available until June. There is a risk to the scrum in terms of managing the end to end language, tone and navigation from Gov.uk guidance and then into the tool.</p>	<p>This is mitigated by using a common style guide and [redacted] kindly offered to talk if we had any major concerns.</p> <p>Content designer allocated. We have access to Gov.uk content via Sharepoint.</p> <p>Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)</p>		Closed

Check Employment Status for Tax - Sprint Review - 15th May

PRODUCT VISION

Users

Primary:

- Public sector employers
- Large and medium private sector employers

Secondary:

- Intermediaries and workers may also use the product
- Specific user groups
- Agencies

Needs

How will it meet a user's needs:

- Allow both public and private sector users to correctly administer the worker's payment for tax purposes
- Allow users to be able to answer questions that will give an accurate assessment of a worker's status
- Allow users to easily understand the purpose of the tool, and the next steps
- Allow users to submit feedback
- Allow users who work in specific industries to quickly exit the tool
- Allow users to perform more than one check in a session (not having to start again)
- Allow users to get help using the tool

Goals for this Sprint

- Continue iterating and testing the task driven entry points
- Continue iterating and testing in service content that is relevant to the user
- Continue iterating and testing tailored results page
- Deploy refactored code
- Deploy personalised journeys (subject to sign off) in existing service
- Deploy Welsh (subject to sign off by Welsh Unit)

Decision and Assumption Logs			
Number	Decision	Decision Maker	Date
1	Indeterminate answer due to complexity is an acceptable outcome for CEET	Agreed at inception event	20/02/2019
2	Task based approach to entry	Agreed Sprint Review	22/03/2019
3	Tailoring of result page	Agreed Sprint Review	22/03/2019
4	Mutuality of Obligation - there will be no questions on MOO introduced into the digital service. There will be an HMRC paper detailing the HMRC approach to MOO.	Face to Face	10/04/2019
5	Multiple engagements (Business on own account). This will not be directly addressed within the digital service. This is because some of the users of the service cannot answer the questions.	Face to Face	10/04/2019
6	Tool Structure (reasonable care). Agreed that structure could be changed in response to user needs especially around reasonable care and risk.	Face to Face	10/04/2019
7	Particular occupations. These do not have to be addressed in the digital service.	Face to Face	10/04/2019
Number	Assumption		Date
1	Discussed with PM/BA on a Skype call 29/04/2019 11:30 - 12:30. CEET 2 is not currently in scope. User need identified is more appropriately met by public facing API.		29/04/2019
2	Business process for dealing with "Indeterminata" response is unchanged. For content purposes.		29/04/2019

Done during this sprint

Design

- Task driven entry points
- Tailored results page
- New content throughout

Username:

Password:

Done during this sprint

It's a team sport and it is going on yesterday and today

Round 3 Usability
Findings and
Contextual
Research
Findings have
been distributed

All research can be found in Microsoft teams

Join the team [Check Employment Status for Tax](#)

Key findings

- Office holder question was again, extremely well understood
- Users were all able to self identify at the beginning of the tool
- New results screen layout was very well received and easy to understand
- Users felt that having the 'About your result' screen up front was better and highlighted the fact for using reasonable care throughout the tool
- Substitute question was well understood and users were able to link it to real world examples

- Use of 'this business' caused confusion as users felt this referred to the potential contractor
- Use of 'your people' wasn't well understood
- Users did not realise they could carry on through the tool when hitting the 'you do not need to answer any more questions' screen
- Users were looking at some questions in a too granular level

Done during this sprint

Development

Refactored code in production environment



Personalised journeys (tone) in existing service



Welsh service refactored (no toggle) in production environment



What do we propose

Based on our learning, what do we propose

With large and medium private sector users

- *Continue iterating and testing the task driven entry points*
- *Continue iterating and testing in service content that is relevant to the user*
- *Continue iterating and testing tailored results page*
- *Build Entry Journey*
- *Deploy Welsh (subject to sign off by Welsh Unit)*

Roadmap

	Pre-Discovery & Discovery		Alpha/Beta								
	Sprint 0	Sprint 1	Sprint 2	Sprint 3	Sprint 4	Sprint 5	Sprint 6	Sprint 7	Sprint 8	Sprint 9	Sprint 10
	06/02/19 - 19/02/19	20/02/19 - 06/03/19	07/03/19 - 20/03/19	21/03/19 - 03/04/19	04/04/19 - 17/04/19	18/04/19 - 01/05/19	02/05/19 - 15/05/19	16/05/19 - 29/05/19	30/05/19 - 12/06/19	13/06/19 - 26/06/19	27/06/19 - 10/07/19
User type (Persona)	- Contractors 'workers' (internal HMRC staff)	- Contractors 'workers' (internal HMRC staff) - Engagers	Tax/Financial experts & Large orgs	ICEAW/CBI	Engagers/HR/Resourcing/End client	Private sector contractors	Internal HMRC (Tier 2 support)				
Methodology	Contextual inquiry	Inception event	- Round table - Contextual	- Round table - Contextual	- Usability testing - Contextual study	- Usability testing - Contextual study	- User interviews - Contextual usability testing	Usability testing	Usability testing	Usability testing	
Location	Telford office	Canary Wharf	London	Likely London							
Events		Inception Event	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	
Assurance Events									Research, Accessibility & Design	GDS Standards Assessment (Style TBA)	
Products		Product Vision User Needs		Product Backlog			Security Risk Assessment	Engage Gov.uk Content Designer			
Design							Iterating	Iterating	Iterating	Iterating	Iterating
Development				Google Analytics Audit	Refactoring Dev Resource join scrum	Refactoring	Deploy Refactored Code Activate Welsh service Tone correct in existing service	Entry (includes Private Sector)	Exit (Tailored) Welsh Language New Service (extract for translation)	Working arrangement sections	Welsh Language - Deploy DAC (External Accessibility Testing)

Updates made: Development Lane & Assurance Events

Thank you

Risk and Issues

Number	Description	Mitigation	Owner	Status
1	<p>Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act.</p> <p>There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.</p>	<p>1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard</p> <p>2 - Store data in an easily accessible format</p> <p>3 - Be as transparent as possible e.g. UAT in GitHub</p>		Closed
2	<p>Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>There will be a six week period of support for the new service. There have been a number of iterations in design. We have added a whole new section based on user research.</p>		Closed
3	<p>Deskpro secure email is currently unsupported on a day to day basis</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>Customer Service Group have agreed to support the deskpro service.</p>		Closed
4	<p>We do not understand the supporting end to end business process for the indeterminate outcome e.g. will the existing contract review service be available.</p> <p>See Assumption No. 2</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p>		Closed
5	<p>Gov.uk content designer will not be available until June. There is a risk to the scrum in terms of managing the end to end language, tone and navigation from Gov.uk guidance and then into the tool.</p>	<p>This is mitigated by using a common style guide and [redacted] kindly offered to talk if we had any major concerns.</p> <p>Content designer allocated. We have access to Gov.uk content via Sharepoint.</p> <p>Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)</p>		Closed

Check Employment Status for Tax - Sprint Review - 29th May

PRODUCT VISION

Users

Primary:

- Public sector employers
- Large and medium private sector employers

Secondary:

- Intermediaries and workers may also use the product
- Specific user groups
- Agencies

Needs

How will it meet a user's needs:

- Allow both public and private sector users to correctly administer the worker's payment for tax purposes
- Allow users to be able to answer questions that will give an accurate assessment of a worker's status
- Allow users to easily understand the purpose of the tool, and the next steps
- Allow users to submit feedback
- Allow users who work in specific industries to quickly exit the tool
- Allow users to perform more than one check in a session (not having to start again)
- Allow users to get help using the tool

Goals for this Sprint

- Continue iterating and testing the task driven entry points
- Continue iterating and testing in service content that is relevant to the user
- Continue iterating and testing tailored results page
- Entry Journey
- Remove automatic kick out
- Check your answers page

Decision and Assumption Logs			
<small>Created by Man, Sam, Sarah and Laila in January 2019</small>			
Number	Decision	Decision Maker	Date
1	Indeterminate answer due to complexity is an acceptable outcome for CEET	Agreed at inception event	20/02/2019
2	Task based approach to entry	Agreed Sprint Review	22/01/2019
3	Tailoring of result page	Agreed Sprint Review	22/03/2019
4	Mutuality of Obligation - there will be no questions on MOO introduced into the digital service. There will be an HMRC paper detailing the HMRC approach to MOO.	Face to Face	10/04/2019
5	Multiple engagements (Business on own account). This will not be directly addressed within the digital service. This is because some of the users of the service cannot answer the questions.	Face to Face	10/04/2019
6	Tool Structure (reasonable care). Agreed that structure could be changed in response to user needs especially around reasonable care and risk.	Face to Face	10/04/2019
7	Particular occupations. These do not have to be addressed in the digital service.	Face to Face	10/04/2019
Number	Assumption		Date
1	Discussed with PM/BA on a Skype call 29/04/2019 11:30 - 12:30. CEET 2 is not currently in scope. User need identified is more appropriately met by public facing API.		29/04/2019
2	Business process for dealing with "Indeterminate" response is unchanged. For content purposes.		29/04/2019

Done during this sprint

Development

- Entry Journey
- Remove automatic kick out
- Check your answers page



Unblocked

Deployed refactored code and personalised journeys (subject to sign off) in existing service



Blocked (Wedi'i rwystro)

Deploy toggle for Welsh language in existing service (currently with Welsh Language Unit for QA)



Over to Development team to Demo

Done during this sprint

Design

- Task driven entry points
- Tailored results page
- New content throughout

Username:

Password:

Over to to Demo latest version of the prototype

Done during this sprint

Research

- Held 3 roundtable events
 - Opportunity for external stakeholders to be kept up to date with the journey so far
 - Also for them to give feedback on the changes and updates we've made
- Held first of 3 usability testing sessions this week (split over two sprints)
 - Feedback is still to be fully analysed but on first sight, a lot of the feedback matches what we heard in some of the roundtable events last week

Done during this sprint

It's a team sport and it is going on yesterday and tomorrow

Round 4 Usability
Findings and
Contextual
Research
Findings have
been distributed

Round table
events held on
22nd and 23rd
May

Over to Ash (Stuart) for verbal update

All research can be found in Microsoft teams

Join the team [Check Employment Status for Tax](#)

Key findings

- Gov.uk guidance page was well received on the whole
 - Users liked how it was set out
- Content of 'office holder' and 'substitution' questions was again very well received
- Users understood the 'financial risk' question and were all able to answer confidently
- Check your answers screen was again very well received
 - All users stated how useful this was
- Once users reached the PDF they were happy with the layout and details provided
- Highest SUS score to date!

- Splitting the 'who are you' options actually caused more confusion for the users
- Users were unaware they could/should pick multiple options on the 'size of company' multiple choice question
- Users still going to a too granular level on question regarding workers location
- 'Partly' options on questions seem to be an easy get-out for users, even though on a lot of cases it does match real world scenarios
- Not quite clear that users can add personalisation details to the PDF that they are given the choice to download
- Need to revisit questions which aren't suitable for screen readers

What do we propose

Based on our learning, what do we propose

With large and medium private sector users

- *Continue iterating and testing the task driven entry points*
- *Continue iterating and testing in service content that is relevant to the user*
- *Continue iterating and testing tailored results page*
- *New Personal Service, Control, Financial Risk and Part & Parcel sections*
- *New result pages*

Roadmap

	Pre-Discovery & Discovery		Alpha/Beta								
	Sprint 0	Sprint 1	Sprint 2	Sprint 3	Sprint 4	Sprint 5	Sprint 6	Sprint 7	Sprint 8	Sprint 9	Sprint 10
	06/02/19 - 19/02/19	20/02/19 - 06/03/19	07/03/19 - 20/03/19	21/03/19 - 03/04/19	04/04/19 - 17/04/19	18/04/19 - 01/05/19	02/05/19 - 15/05/19	16/05/19 - 29/05/19	30/05/19 - 12/06/19	13/06/19 - 26/06/19	27/06/19 - 10/07/19
User type (Persona)	- Contractors 'workers' (internal HMRC staff)	- Contractors 'workers' (internal HMRC staff) - Engagers	Tax/Financial experts & Large orgs	ICEAW/CBI	Engagers/HR/Resourcing/End client	Private sector contractors	Internal HMRC (Tier 2 support)				
Methodology	Contextual inquiry	Inception event	- Round table - Contextual	- Round table - Contextual	- Usability testing - Contextual study	- Usability testing - Contextual study	- User interviews - Contextual usability testing	Usability testing	Usability testing	Usability testing	
Location	Telford office	Canary Wharf	London	Likely London							
Events		Inception Event	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	
Assurance Events									Research, Accessibility & Design	GDS Standards Assessment (Style TBA)	
Products		Product Vision User Needs		Product Backlog			Security Risk Assessment	Engage Gov.uk Content Designer			
Design							Iterating	Iterating	Iterating	Iterating	Iterating
Development				Google Analytics Audit	Refactoring Dev Resource join scrum	Refactoring	Deploy Refactored Code Activate Welsh service Tone correct in existing service	Entry (includes Private Sector)	Exit (Tailored) Welsh Language New Service (extract for translation)	Working arrangement sections	Welsh Language - Deploy DAC (External Accessibility Testing)

Last updates made: Development Lane & Assurance Events

Thank you

Risk and Issues

Number	Description	Mitigation	Owner	Status
1	<p>Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act.</p> <p>There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.</p>	<p>1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard</p> <p>2 - Store data in an easily accessible format</p> <p>3 - Be as transparent as possible e.g. UAT in GitHub</p>		Closed
2	<p>Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>There will be a six week period of support for the new service. There have been a number of iterations in design. We have added a whole new section based on user research.</p>		Closed
3	<p>Deskpro secure email is currently unsupported on a day to day basis</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>Customer Service Group have agreed to support the deskpro service.</p>		Closed
4	<p>We do not understand the supporting end to end business process for the indeterminate outcome e.g. will the existing contract review service be available.</p> <p>See Assumption No. 2</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p>		Closed
5	<p>Gov.uk content designer will not be available until June. There is a risk to the scrum in terms of managing the end to end language, tone and navigation from Gov.uk guidance and then into the tool.</p>	<p>This is mitigated by using a common style guide and [redacted] kindly offered to talk if we had any major concerns.</p> <p>Content designer allocated. We have access to Gov.uk content via Sharepoint.</p> <p>Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)</p>		Closed

Check Employment Status for Tax - Sprint Review - 12 June

PRODUCT VISION

Users

Primary:

- Public sector employers
- Large and medium private sector employers

Secondary:

- Intermediaries and workers may also use the product
- Specific user groups
- Agencies

Needs

How will it meet a user's needs:

- Allow both public and private sector users to correctly administer the worker's payment for tax purposes
- Allow users to be able to answer questions that will give an accurate assessment of a worker's status
- Allow users to easily understand the purpose of the tool, and the next steps
- Allow users to submit feedback
- Allow users who work in specific industries to quickly exit the tool
- Allow users to perform more than one check in a session (not having to leave the tool)
- Allow users to get help using the tool

Goals for this Sprint

- Continue iterating and testing the task driven entry points
- Continue iterating and testing in service content that is relevant to the user
- Continue iterating and testing tailored results page
- New Personal Service, Control, Financial Risk and Part & Parcel sections
- New result pages

Decision and Assumption Logs			
Number	Decision	Decision Maker	Date
1	Indeterminate answer due to complexity is an acceptable outcome for CEFT	Agreed at inception event	20/02/2019
2	Task based approach to entry	Agreed Sprint Review	22/03/2019
3	Tailoring of result page	Agreed Sprint Review	22/03/2019
4	Mutuality of Obligation - there will be no questions on MOO introduced into the digital service. There will be an HMRC paper detailing the HMRC approach to MOO.	Face to Face	10/04/2019
5	Multiple engagements (Business on own account). This will not be directly addressed within the digital service. This is because some of the users of the service cannot answer the questions.	Face to Face	10/04/2019
6	Tool Structure (reasonable care). Agreed that structure could be changed in response to user needs especially around reasonable care and risk.	Face to Face	10/04/2019
7	Particular occupations. These do not have to be addressed in the digital service.	Face to Face	10/04/2019
Number	Assumption		Date
1	Discussed with PM/BA on a Skype call 29/04/2019 11:30 - 12:30. CEFT 2 is not currently in scope. User need identified is more appropriately met by public facing API.		29/04/2019
2	Business process for dealing with "Indeterminate" response is unchanged. For content purposes.		29/04/2019

Done during this sprint

Development

- Personal Service, Control, Financial Risk, Part & Parcel
- Completed Set Up with optimised content
- Removing early exits



Unblocked (heb ei gloi)

Deployed toggle for Welsh language in existing service



Analytics

<https://datastudio.google.com/open/10Qg1rvDKUyIBrj4votgic0xEtqqFJxN8>



Inloggen - Google Accounts

datastudio.google.com

Over to Development team to Demo

Done during this sprint

Design

- Task driven entry points - issues
- Tailored results page
- Financial risk - issues

<https://www.prototypes.tax.service.gov.uk/check-employment-status-for-tax-prototype/>

Username: prototypes

Password: Th3CatSat0

Over to Kim/Stuart/Georgie to Demo latest version of the prototype

Done during this sprint

Research

- Held 2 usability testing sessions (split over two sprints) with 6 private sector hiring managers
 - Feedback is still to be fully analysed but on first sight, a lot of the feedback matches what we heard in some of the roundtable events last week

Done during this sprint

It's a team sport and it is going on yesterday and tomorrow

Round 5 Usability
Findings and
Contextual
Research
Findings have
been distributed

Over to for verbal update

All research can be found in Microsoft teams

Join the team [Check Employment Status for Tax](#)

Key findings

- Vast majority of questions and answers are now being well understood by users
 - Users found the way that the substitution questions were split (if answering for a current contract) was much more understandable than the original version
 - The disclaimer, albeit being seen as strongly worded, was very well received and users stated that it clearly set out HMRC' stance
 - All users were able to complete the tool and get an outcome
 - Highest single SUS score to date
- The private sector company size question was still not seen as a multiple choice question in the first instance for the majority of users
 - The worker incurring significant cost questions were still not providing enough context (on the first question of these) for users to give an informed answer
 - Users still slightly unsure that the 'details' they could add would be shown on a downloadable copy of their result
 - Users expected the time/date stamp to appear at the top of the downloadable output

What do we propose

Based on our learning, what do we propose

With large and medium private sector users

- *Continue iterating and testing the task driven entry points*
- *Continue iterating and testing in service content that is relevant to the user*
- *Continue updating result pages*
- *New PDF*
- *Continuing content updates*

Roadmap

	Pre-Discovery & Discovery		Alpha/Beta								
	Sprint 0	Sprint 1	Sprint 2	Sprint 3	Sprint 4	Sprint 5	Sprint 6	Sprint 7	Sprint 8	Sprint 9	Sprint 10
	06/02/19 - 19/02/19	20/02/19 - 06/03/19	07/03/19 - 20/03/19	21/03/19 - 03/04/19	04/04/19 - 17/04/19	18/04/19 - 01/05/19	02/05/19 - 15/05/19	16/05/19 - 29/05/19	30/05/19 - 12/06/19	13/06/19 - 26/06/19	27/06/19 - 10/07/19
User type (Persona)	- Contractors 'workers' (internal HMRC staff)	- Contractors 'workers' (internal HMRC staff) - Engagers	Tax/Financial experts & Large orgs	ICEAW/CBI	Engagers/HR/Resourcing/End client	Private sector contractors	Internal HMRC (Tier 2 support)				
Methodology	Contextual inquiry	Inception event	- Round table - Contextual	- Round table - Contextual	- Usability testing - Contextual study	- Usability testing - Contextual study	- User interviews - Contextual usability testing	Usability testing	Usability testing	Usability testing	
Location	Telford office	Canary Wharf	London	Likely London							
Events		Inception Event	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	
Assurance Events									Research, Accessibility & Design	GDS Standards Assessment (Style TBA)	
Products		Product Vision User Needs		Product Backlog			Security Risk Assessment	Engage Gov.uk Content Designer			
Design							Iterating	Iterating	Iterating	Iterating	Iterating
Development				Google Analytics Audit	Refactoring Dev Resource join scrum	Refactoring	Deploy Refactored Code Activate Welsh service Tone correct in existing service	Entry (includes Private Sector)	Exit (Tailored) Welsh Language New Service (extract for translation)	Working arrangement sections	Welsh Language - Deploy DAC (External Accessibility Testing)

Last updates made: Development Lane & Assurance Events

Thank you

Risk and Issues

Number	Description	Mitigation	Owner	Status
1	<p>Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act.</p> <p>There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.</p>	<p>1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard</p> <p>2 - Store data in an easily accessible format</p> <p>3 - Be as transparent as possible e.g. UAT in GitHub</p>	[REDACTED]	Closed
2	<p>Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>There will be a six week period of support for the new service. There have been a number of iterations in design. We have added a whole new section based on user research.</p>	[REDACTED]	Closed
3	<p>Deskpro secure email is currently unsupported on a day to day basis</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>Customer Service Group have agreed to support the deskpro service.</p>	[REDACTED]	Closed
4	<p>We do not understand the supporting end to end business process for the indeterminate outcome e.g. will the existing contract review service be available.</p> <p>See Assumption No. 2</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p>	[REDACTED]	Closed
5	<p>Gov.uk content designer will not be available until June. There is a risk to the scrum in terms of managing the end to end language, tone and navigation from Gov.uk guidance and then into the tool.</p>	<p>This is mitigated by using a common style guide and [REDACTED] kindly offered to talk if we had any major concerns.</p> <p>Content designer allocated. We have access to Gov.uk content via Sharepoint.</p> <p>Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)</p>	[REDACTED]	Closed

Check Employment Status for Tax - Sprint Review - 10 July

PRODUCT VISION

Users

Primary:

- Public sector employers
- Large and medium private sector employers
- Small private sector employers

Secondary:

- Intermediaries and workers may also use the product
- Recruitment agencies (fee payers)

Needs

How will it meet a user's needs:

- Allow both public and private sector users to correctly administer the worker's payment for tax purposes
- Allow users to be able to answer questions that will give an accurate assessment of a worker's status
- Allow users to easily understand the purpose of the tool, and the next steps
- Allow users to submit feedback
- Allow users to get help using the tool

Product Goals

What are the key goals for the product:

- Ensure the product meets the needs of the private sector
- Ensure that the service addresses business on own account
- Ensure that the questions asked are clearer for the user, therefore leading to more accurate results
- Improve/clarify the content, so that it's clearer and more understandable for the user
- Improve the overall user journey through iterative user research
- Create an exit survey

Goals for this Sprint

- Technical spike to investigate changes to the Decision service
- Complete July MVP original scope
- Addressing recommendations in our Research, Accessibility & Design review
- Start initial design of Business on Own Account questions

Decision and Assumption Logs			
View by: All Individual Summary			
Number	Decision	Decision Maker	Date
1	Implement error due to complexity in an accessible outcome for COF	Agreed in meeting event	20/02/19
2	Not based around in error	Agreed Sprint Review	20/02/19
3	Missing of email page	Agreed Sprint Review	20/02/19
4	Validity of Obligation - there will be no questions in M2D introduced into the digital service There will be an M2C paper detailing the M2D approach to M2D	None to Date	16/02/19
5	Multiple engagements Business on own account. This will not be directly addressed within the digital service This is because the core of the work of the service cannot answer the questions.	None to Date	16/02/19
6	Not Structure reasonable user, Agreed that structure could be changed in response to user needs especially around reasonable user and 16	None to Date	16/02/19
7	Particular circumstances. These do not have to be addressed in the digital service	None to Date	16/02/19
Number	Assumption	Date	
1	Discussed with PMO on a regular call. 20/02/19 11:00 - 12:00. COF is not currently in scope. User need identified is more appropriately met by public facing app.	20/02/19	
2	Business process for dealing with 'Substantial' response is unchanged for current process.	20/02/19	

Done during this sprint

Development

- Personal Details on the PDF
- New PDF
- URL updates
- Change your answers
- Content updates
- Accessibility bugs identified in internal assessment



Over to the team to demo

Vision for Decision Service Refactoring

- Capability to add to and adjust the Decision Service - easier to enhance in the future
- Make the decision service easier to support in live (reduction in resource and time)
- Reduction in running costs (instances reduced and memory usage)
- More performant
- Easier for third party developers to understand

Done during this sprint

Design

- Initial thinking about Business On Own Account
- Addressing recommendations in Research, Accessibility Review

SET UP

CURRENT	HIRER	WORKER
<p>Background information</p> <p>What do you want to find out?</p> <ul style="list-style-type: none"><input type="radio"/> If a contract you're working on, or could be working on, is within the off-payroll working rules (IR35)<input type="radio"/> If a contract your organisation is offering is within the off-payroll working rules (IR35)<input type="radio"/> If a contract your agency is recruiting for is within the off-payroll working rules (IR35)<input type="radio"/> If you are employed or self-employed for tax purposes<input type="radio"/> If a job you're hiring for is classed as employed or self-employed for tax purposes <p>Continue</p>	<p>Who are you?</p> <ul style="list-style-type: none"><input type="radio"/> Worker<input type="radio"/> Hirer<input type="radio"/> Agency	<p>Who are you?</p> <ul style="list-style-type: none"><input type="radio"/> Worker<input type="radio"/> Hirer<input type="radio"/> Agency
	<p>What do you want to find out about this work?</p> <ul style="list-style-type: none"><input type="radio"/> If it falls within the off-payroll working rules (IR35)<input type="radio"/> If it should be classed as employed or self-employed for tax purposes	<p>What are you trying to find out about your work?</p> <ul style="list-style-type: none"><input type="radio"/> If it falls within the off-payroll working rules (IR35)<input type="radio"/> If you should be classed as employed or self-employed for tax purposes

SET UP

CURRENT

Background information

In which sector is the client you will be doing the work for?

Private sector

Public sector

Continue

HIRER

Is your organisation a 'Public Authority'?

This can include the following:

- government departments and their executive agencies
- companies owned or controlled by the public sector
- schools and universities
- local authorities
- the National Health Service (NHS)

Read more about [Public Authorities](#).

Yes No

WORKER

Is your client a 'Public Authority'?

This can include the following:

- government departments and their executive agencies
- companies owned or controlled by the public sector
- schools and universities
- local authorities
- the National Health Service (NHS)

Read more about [Public Authorities](#).

Yes No

WORKERS DUTIES

CURRENT	HIRER	WORKER
<p>Worker's duties</p> <p>During this work will you act as a board member, treasurer, trustee, company director, company secretary or other office holder position for your client?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>Continue</p>	<p>Will the worker be in an 'Office Holder' position?</p> <p>This can include a board member, treasurer, trustee, company secretary, or company director.</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>Read more about Office Holders.</p>	<p>Will you work in an 'Office Holder' position?</p> <p>This can include a board member, treasurer, trustee, company secretary, or company director.</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>Read more about Office Holders.</p>

Done during this sprint

Research

- Held usability testing sessions (split over two sprints) with 7 hiring managers

Key findings

- On the whole, users found the tool was easy to use
- Agencies struggled to identify the correct option - they missed the information about continuing as the worker
- The term opportunity cost caused some confusion.
- Substantial costs is open to interpretation

Done during this sprint

It's a team sport

Round 6 and 7
Usability Findings
and Contextual
Research
Findings have
been distributed

Link to:

[User Research](#)

What do we propose

Based on our learning, what do we propose

With contractors users

- *Continue iterating and testing in service content that is relevant to the user*
- *Start testing Business on Own Account designs*
- *Starting the refactoring of the Decision Service*

Roadmap

	Sprint 8	Sprint 9	Sprint 10	Sprint 11	Sprint 12	Sprint 13	Sprint 14	Sprint 15	Sprint 16
	30/05/19 - 12/06/19	13/06/19 - 26/06/19	27/06/19 - 10/07/19	11/07/19 - 24/07/19	25/07/19 - 07/08/19	08/08/19 - 21/08/19	22/08/19 - 4/09/19	05/09/19 - 18/09/19	19/09/19 - 3/10/19
User type (Persona)									
Methodology	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	
Location									
Events	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review
Assurance Events	Research, Accessibility & Design						GDS Standards Assessment		
Products									
Design	Iterating	Iterating	Business On Own Account	Business On Own Account	Business On Own Account	Business On Own Account	Business On Own Account	Business On Own Account	
Development	Exit (Tailored) Welsh Language New Service (extract for translation)	Working arrangement sections	July MVP in production but not live External penetration testing Technical Spike to look at back end micro-service refactor and additional weighted items	Iterating production code	Iterating production code	Iterating production code	Iterating production code	Welsh Language - Deploy DAC (External Accesibility Testing)	October MVP

Last updates made: **Added Business on Own Account and extended timeline**

Thank you

Useful Links:

Analytics



Username:

Password:

Risk and Issues

Number	Description	Mitigation	Owner	Status
1	<p>Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act.</p> <p>There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.</p>	<p>1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard</p> <p>2 - Store data in an easily accessible format</p> <p>3 - Be as transparent as possible e.g. UAT in GitHub</p>		Closed
2	<p>Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>There will be a six week period of support for the new service. There have been a number of iterations in design. We have added a whole new section based on user research.</p>		Closed
3	<p>Deskpro secure email is currently unsupported on a day to day basis</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>Customer Service Group have agreed to support the deskpro service.</p>		Closed
4	<p>We do not understand the supporting end to end business process for the indeterminate outcome e.g. will the existing contract review service be available.</p> <p>See Assumption No. 2</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p>		Closed
5	<p>Gov.uk content designer will not be available until June. There is a risk to the scrum in terms of managing the end to end language, tone and navigation from Gov.uk guidance and then into the tool.</p>	<p>This is mitigated by using a common style guide and [REDACTED] kindly offered to talk if we had any major concerns.</p> <p>Content designer allocated. We have access to Gov.uk content via Sharepoint.</p> <p>Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)</p>		Closed

Check Employment Status for Tax - Sprint Review - 24 July

PRODUCT VISION

Users

Primary:

- Public sector employers
- Large and medium private sector employers
- Small private sector employers

Secondary:

- Intermediaries and workers may also use the product
- Recruitment agencies (fee payers)

Needs

How will it meet a user's needs:

- Allow both public and private sector users to correctly administer the worker's payment for tax purposes
- Allow users to be able to answer questions that will give an accurate assessment of a worker's status
- Allow users to easily understand the purpose of the tool, and the next steps
- Allow users to submit feedback
- Allow users to get help using the tool

Product Goals

What are the key goals for the product:

- Ensure the product meets the needs of the private sector
- Ensure that the service addresses business on own account
- Ensure that the questions asked are clearer for the user, therefore leading to more accurate results
- Improve/clarify the content, so that it's clearer and more understandable for the user
- Improve the overall user journey through iterative user research
- Create an exit survey

Goals for this Sprint

- Refactoring the Decision service
- Continue design of Business on Own Account questions
- Start testing Business on Own Account designs
- Addressing recommendations in our Research, Accessibility & Design review

Decision and Assumption Logs			
Number	Decision	Decision Maker	Date
1	Indeterminate answer that to complexity is an acceptable outcome for CDT?	Agreed at inception point	22/01/2018
2	Task based approach to entry	Agreed Sprint Review	22/01/2018
3	Timing of mail page	Agreed Sprint Review	22/01/2018
4	Mutuality of Obligation - there will be no questions on MOO introduced into the digital service. There will be an MHC paper adopting the MHC approach to MOG	Face to Face	15/06/2018
5	Multiple engagements (Business on own account). This will not be directly addressed within the digital service. This is because the sort of the users of the service cannot answer the questions.	Face to Face	15/06/2018
6	Tool Structure (accessible card). Agreed that structure could be changed in response to user needs especially around accessible card and tab.	Face to Face	15/06/2018
7	Particular situations. These do not have to be addressed in the digital service	Face to Face	16/06/2018
Number	Assumption	Date	
1	Discussed with PwC for a Skype call 25/06/2018 11:30 - 12:00. CDT 2 is not currently in scope. User need identified is more appropriately met by public facing API.	25/06/2018	
2	Business process for dealing with "Indeterminate" response is unchanged for content purposes.	25/06/2018	

Done during this sprint

Development

- Create comprehensive set of Integration Tests to fire JSON interview models at the service and check expected outcome is correct. ✓
- Update Tests with 13 outstanding cases to assert the correctness of the decision matrix and ability to answer FOI requests ✓
- Update Tests with 25 cases to assert the correctness of the decision matrix and ability to answer FOI requests ✓
- Create concrete implementations of the RuleSet AbstractClass for each required set of rules for each section ✓
- Refactor the frontend microservice to implement a feature switch for calling the new and old Decision Engine logic ✓

Vision for Decision Service Refactoring

- Capability to add to and adjust the Decision Service - easier to enhance in the future
- Make the decision service easier to support in live (reduction in resource and time)
- Reduction in running costs (instances reduced and memory usage)
- More performant
- Easier for third party developers to understand

Done during this sprint

Design

- Initial thinking about Business On Own Account
- Addressing recommendations in Research, Accessibility Review

Business on Own Account

Does the contract prevent the worker from providing similar services to other engagers?

- Yes, in full - I am unable to provide similar services to any other engager for the duration of this contract.
- Partially - I can provide similar service to other engagers throughout this contract but require the permission from my engager (the client) to do so.
- No - I am free to provide services to other engagers without restriction.

Continue

Original
Question/Answers

During this work, does the contract stop the worker from doing similar work for any other organisations?

Yes

No

Would the worker need permission from you to work for other organisations?

Yes/No

Answer combinations:

Yes = "Yes in full"
No/No = "No I am free..."
No/Yes = "Partially"

Business on Own Account

Does the contract require the worker to transfer proprietary rights, such as intellectual property to you?

- Yes - Rights are transferred to the client as part of the contract and are included in the agreed fee / payment schedule
- I am able to transfer the rights to the client under the contract but this will be for a separate fee / payment
- No - I retain ownership to all rights arising under the contract
- Not applicable - No such rights arise as a result of my contract

Continue

Original
Question/Answers

Are rights to the work included in the fee?

Yes/Not Applicable

No

Would the worker have to sell you the rights to the work if you requested it?

Yes/No

Answer combinations:

Yes = "Yes rights are transferred"
No/No = "No I retain ownership..."
No/Yes = "I am able..."
Not applicable = "Not applicable"

Done during this sprint

Research

- Held usability testing sessions (split over multiple days) with 4 contractors (workers)
- Questioned which methods of support would be used, should these users become stuck
- Planned upcoming accessibility/AD needs testing sessions

Key findings

- All contractors were easily able to identify 'who they are' at the beginning of the tool
- All contractors were easily able to complete the tool and receive a determination
- For ones that had seen/used the original tool, they stated how much easier and more understandable this updated version is
- A number of users stated how beneficial the H2 additional information underneath some of the questions is
 - It helped them to make more informed answers that they would not have been able to do if the H2 wasn't present
- They all liked having the ability to review and change their answers before submitting

- Some users suggested they would need to 'go away and check' the answer to the '10.2 million turnover' question
- The term 'Opportunity cost' caused some confusion for the users that had never heard of it before
- A number of the contractors suggested that their contract would allow substitution, but they had to spend a lot of time thinking about whether this would actually be able to happen in practice or not

Done during this sprint

It's a team sport

Round 8 Usability
Research findings
have been
distributed

Link to:

What do we propose

Based on our learning, what do we propose

With contractors users

- *Continue iterating and testing in service content that is relevant to the user*
- *Continue testing Business on Own Account designs*
- *Continue the refactoring and testing the new Decision Service*

Roadmap

	Sprint 8	Sprint 9	Sprint 10	Sprint 11	Sprint 12	Sprint 13	Sprint 14	Sprint 15	Sprint 16
	30/05/19 - 12/06/19	13/06/19 - 26/06/19	27/06/19 - 10/07/19	11/07/19 -24/07/19	25/07/19 - 07/08/19	08/08/19 - 21/08/19	22/08/19 - 4/09/19	05/09/19 -18/09/19	19/09/19 - 3/10/19
User type (Persona)									
Methodology	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	
Location									
Events	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review
Assurance Events	Research, Accessibility & Design					Research, Accessibility & Design	GDS Standards Assessment		
Products									
Design	Iterating	Iterating	Business On Own Account	Business On Own Account	Business On Own Account	Business On Own Account	Business On Own Account	Business On Own Account	
Development	Exit (Tailored) Welsh Language New Service (extract for translation)	Working arrangement sections	July MVP in production but not live External penetration testing Technical Spike to look at back end micro-service refactor and additional weighted items	Iterating production code	Iterating production code	Iterating production code	Iterating production code	Welsh Language - Deploy DAC (External Accessibility Testing)	October MVP

Last updates made: **Added Research, Accessibility & Design review in August**

Thank you

Useful Links:

Analytics



Username:

Password:

Risk and Issues

Number	Description	Mitigation	Owner	Status
1	<p>Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act.</p> <p>There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.</p>	<p>1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard</p> <p>2 - Store data in an easily accessible format</p> <p>3 - Be as transparent as possible e.g. UAT in GitHub</p>	[REDACTED]	Closed
2	<p>Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>There will be a six week period of support for the new service. There have been a number of iterations in design. We have added a whole new section based on user research.</p>	[REDACTED]	Closed
3	<p>Deskpro secure email is currently unsupported on a day to day basis</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>Customer Service Group have agreed to support the deskpro service.</p>	[REDACTED]	Closed
4	<p>We do not understand the supporting end to end business process for the indeterminate outcome e.g. will the existing contract review service be available.</p> <p>See Assumption No. 2</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p>	[REDACTED]	Closed
5	<p>Gov.uk content designer will not be available until June. There is a risk to the scrum in terms of managing the end to end language, tone and navigation from Gov.uk guidance and then into the tool.</p>	<p>This is mitigated by using a common style guide and [REDACTED] kindly offered to talk if we had any major concerns.</p> <p>Content designer allocated. We have access to Gov.uk content via Sharepoint.</p> <p>Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)</p>	[REDACTED]	Closed

Check Employment Status for Tax - Sprint Review - 7 August

PRODUCT VISION

Users

Primary:

- Public sector employers
- Large and medium private sector employers
- Small private sector employers

Secondary:

- Intermediaries and workers may also use the product
- Recruitment agencies (fee payers)

Needs

How will it meet a user's needs:

- Allow both public and private sector users to correctly administer the worker's payment for tax purposes
- Allow users to be able to answer questions that will give an accurate assessment of a worker's status
- Allow users to easily understand the purpose of the tool, and the next steps
- Allow users to submit feedback
- Allow users to get help using the tool

Product Goals

What are the key goals for the product:

- Ensure the product meets the needs of the private sector
- Ensure that the service addresses business on own account
- Ensure that the questions asked are clearer for the user, therefore leading to more accurate results
- Improve/clarify the content, so that it's clearer and more understandable for the user
- Improve the overall user journey through iterative user research
- Create an exit survey

Goals for this Sprint

- Refactoring the Decision service including parallel running
- Continue design of Business on Own Account questions
- Continue testing Business on Own Account designs
- Addressing recommendations in our Research, Accessibility & Design review

Decision and Assumption Logs			
Number	Decision	Decision Maker	Date
1	Indeterminate answer that is completely in an acceptable outcome for CDT?	Agreed at inception point	22/01/2018
2	Task based approach to entry	Agreed Sprint Review	22/01/2018
3	Timing of email page	Agreed Sprint Review	22/01/2018
4	Mutuality of Obligation - there will be no questions on MOO introduced into the digital service. There will be an eMRC paper outlining the eMRC approach to MOO	Face to Face	15/06/2018
5	Multiple engagements (Business on own account). This will not be directly addressed within the digital service. This is because the sort of the users of the service cannot answer the questions.	Face to Face	15/06/2018
6	Tool Structure (accessible card). Agreed that structure could be changed in response to user needs especially around accessible card and tab.	Face to Face	15/06/2018
7	Particular circumstances. These do not have to be addressed in the digital service	Face to Face	16/06/2018
Number	Assumption	Date	
1	Discussed with PwC for a Skype call 25/06/2018 11:30 - 12:00. CDT 2 is not currently in scope. User need identified is more appropriately met by public facing API.	25/06/2018	
2	Business process for dealing with "Indeterminate" response is unchanged for content purposes.	25/06/2018	

Done during this sprint

Development

- Completed the refactoring of the backend micro-service ✓
- Started parallel running of the new decision service ✓
- Digital Accessibility testing ✓
- When changing an answer and returning to review your answers the section is open ✓
- When there is a single reason for being outside of Off Payroll working a sentence is shown rather than a single bullet ✓
- File name for PDF ✓

Over to the Dev team

Vision for Decision Service Refactoring

- Capability to add to and adjust the Decision Service - easier to enhance in the future ✓
- Make the decision service easier to support in live (reduction in resource and time) ✓
- Reduction in running costs (instances reduced and memory usage) ✓
- More performant ✓
- Easier for third party developers to understand ✓

Done during this sprint

Design

- Initial Business On Own Account questions designed and out for testing
- Addressing recommendations in Research, Accessibility Review

(Not related to this Sprint but a plea from Marc - please comment on the [New Set Up](#) in Microsoft Teams)

Over to to demo early iterations of the Business on Own Account Questions.

Done during this sprint

What we did

Dates

31st July 2019 & 1st August 2019

4 Participants

- 2x unemployed
- 1x severely dyslexic
- 1x registered blind

How?

We conducted contextual usability testing to understand how easily users could find and navigate through the CEST tool

Key findings

- All users were able to navigate through the tool and complete it
 - This can be seen as a big positive since the users did not have any context with regards to the questions and what they were trying to ascertain
- The user with severe dyslexia did not struggle with any of the content nor the navigation
 - User was very familiar with Gov.uk content though
- The user that is registered blind did not struggle with the content or navigation either
 - User had to use a 150% zoom on the browser as they were used to using their phone and using a 'pinch zoom'
- User with dyslexia stated that they struggle to distinguish when a link has been clicked
 - This is when the link turns a purple colour, the user mentioned that it blended in with the normal text too much
- Users did not understand the intent of some of the questions
 - Although this was expected as these were not true users of the service
- A couple of the users questioned how accessible the download of the PDF would be
- A couple of users stated they'd want a phone number easily accessible for if they got stuck
 - The other two stated they'd be able to get online support for any issues

Done during this sprint

It's a team sport

Round 9 Usability
Research findings
have been
distributed

Link to:

What do we propose

Based on our learning, what do we propose

With contractors users

- *Continue iterating and testing in service content that is relevant to the user*
- *Continue testing Business on Own Account designs*

- *Continue the testing the new Decision Service*
- *Develop new start up section*

Roadmap

	Sprint 8	Sprint 9	Sprint 10	Sprint 11	Sprint 12	Sprint 13	Sprint 14	Sprint 15	Sprint 16
	30/05/19 - 12/06/19	13/06/19 - 26/06/19	27/06/19 - 10/07/19	11/07/19 -24/07/19	25/07/19 - 07/08/19	08/08/19 - 21/08/19	22/08/19 - 4/09/19	05/09/19 -18/09/19	19/09/19 - 3/10/19
User type (Persona)									
Methodology	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	
Location									
Events	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review
Assurance Events	Research, Accessibility & Design					Research, Accessibility & Design	GDS Standards Assessment		
Products									
Design	Iterating	Iterating	Business On Own Account	Business On Own Account	Business On Own Account	Business On Own Account	Business On Own Account	Business On Own Account	
Development	Exit (Tailored) Welsh Language New Service (extract for translation)	Working arrangement sections	July MVP in production but not live External penetration testing Technical Spike to look at back end micro-service refactor and additional weighted items	Iterating production code	Iterating production code	Iterating production code	Iterating production code	Welsh Language - Deploy DAC (External Accessibility Testing)	October MVP

Last updates made: **Added Research, Accessibility & Design review in August**

Thank you

Useful Links:

Analytics



Username:

Password:

Risk and Issues

Number	Description	Mitigation	Owner	Status
1	<p>Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act.</p> <p>There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.</p>	<p>1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard</p> <p>2 - Store data in an easily accessible format</p> <p>3 - Be as transparent as possible e.g. UAT in GitHub</p>		Closed
2	<p>Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>There will be a six week period of support for the new service. There have been a number of iterations in design. We have added a whole new section based on user research.</p>		Closed
3	<p>Deskpro secure email is currently unsupported on a day to day basis</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>Customer Service Group have agreed to support the deskpro service.</p>		Closed
4	<p>We do not understand the supporting end to end business process for the indeterminate outcome e.g. will the existing contract review service be available.</p> <p>See Assumption No. 2</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p>		Closed
5	<p>Gov.uk content designer will not be available until June. There is a risk to the scrum in terms of managing the end to end language, tone and navigation from Gov.uk guidance and then into the tool.</p>	<p>This is mitigated by using a common style guide and [redacted] kindly offered to talk if we had any major concerns.</p> <p>Content designer allocated. We have access to Gov.uk content via Sharepoint.</p> <p>Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)</p>		Closed

Check Employment Status for Tax - Sprint Review - 21 August

PRODUCT VISION

Users

Primary:

- Public sector employers
- Large and medium private sector employers
- Small private sector employers

Secondary:

- Intermediaries and workers may also use the product
- Recruitment agencies (fee payers)

Needs

How will it meet a user's needs:

- Allow both public and private sector users to correctly administer the worker's payment for tax purposes
- Allow users to be able to answer questions that will give an accurate assessment of a worker's status
- Allow users to easily understand the purpose of the tool, and the next steps
- Allow users to submit feedback
- Allow users to get help using the tool

Product Goals

What are the key goals for the product:

- Ensure the product meets the needs of the private sector
- Ensure that the service addresses business on own account
- Ensure that the questions asked are clearer for the user, therefore leading to more accurate results
- Improve/clarify the content, so that it's clearer and more understandable for the user
- Improve the overall user journey through iterative user research
- Create an exit survey

Goals for this Sprint

- Monitoring the Decision service in parallel running
- Continue design of Business on Own Account questions
- Continue testing Business on Own Account designs
- Complete any recommendations in our external Accessibility Review
- Start building Business on Own Account pages

Done during this sprint

Development

- ✓ ✓ ● Parallel running of refactored of the backend micro-service (131K decisions with no mismatches)
- ✓ ✓ ● Digital Accessibility recommendations completed (apart from one AAA recommendation)
- ✓ ✓ ● Final content changes to the clarifications in the paragraph below question (based on user feedback)
- ✓ ✓ ● Subtitles added for question areas to match the Check Your Answers section
- ✓ ✓ ● Business on Own Account questions built (no logic for check your answers)
- ✓ Over to the Dev team

Vision for Decision Service Refactoring

- Capability to add to and adjust the Decision Service - easier to enhance in the future ✓
- Make the decision service easier to support in live (reduction in resource and time) ✓
- Reduction in running costs (instances reduced and memory usage) ✓
- More performant ✓
- Easier for third party developers to understand ✓

Done during this sprint

Design

- 4 Business On Own Account questions designed and out for testing (Stable)

Blocker - the period of time for multiple engagements

Over to ████ to demo early iterations of the Business on Own Account Questions.

Done during this sprint

What we did

Dates

6th & 7th August 2019

11 Participants

- 6 hiring managers/payroll managers
- 5 media group hiring managers/payroll managers

How?

We conducted usability testing to understand how easily users could find and navigate through the CEST tool

Key findings

- Users are saying how much of an improvement this version of the tool is compared to the original version
- Users (uninterrupted) are able to complete the tool in around 10-15 minutes
- Business on Own Account questions tested reasonably well and not too much rework is needed on them from an understanding point of view
 - Majority of users understood the intent of the questions on the whole
- Some confusion on the first question of the tool was shown by users on the first day of testing (although, on the second day these issues were not present)
- There were some questions raised about the Intellectual property rights fees
- The term 'unincorporated body' was mentioned by a handful of users, suggesting they don't know what one is (this is the first time we've seen this)

Done during this sprint

It's a team sport

Round 10
Usability
Research findings
have been
distributed

Link to:

What do we propose

Based on our learning, what do we propose

With contractors users

- *Continue testing Business on Own Account designs*
- *Add Business on Own Account Decision Service (Blocked)*
- *Logic for check your answer logic for Business on Own Account*
- *Extract stable English content for translation*
- *Decommission old decision service*

Roadmap

	Sprint 8	Sprint 9	Sprint 10	Sprint 11	Sprint 12	Sprint 13	Sprint 14	Sprint 15	Sprint 16
	30/05/19 - 12/06/19	13/06/19 - 26/06/19	27/06/19 - 10/07/19	11/07/19 -24/07/19	25/07/19 - 07/08/19	08/08/19 - 21/08/19	22/08/19 - 4/09/19	05/09/19 -18/09/19	19/09/19 - 3/10/19
User type (Persona)									
Methodology	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	
Location									
Events	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review
Assurance Events	Research, Accessibility & Design					Research, Accessibility & Design	GDS Standards Assessment		
Products									
Design	Iterating	Iterating	Business On Own Account	Business On Own Account	Business On Own Account	Business On Own Account	Business On Own Account	Business On Own Account	
Development	Exit (Tailored) Welsh Language New Service (extract for translation)	Working arrangement sections	July MVP in production but not live External penetration testing Technical Spike to look at back end micro-service refactor and additional weighted items	Iterating production code	Iterating production code	Iterating production code	Iterating production code	Welsh Language - Deploy DAC (External Accessibility Testing)	October MVP

Last updates made: **Added Research, Accessibility & Design review in August**

Thank you

Useful Links:

Analytics



Username:

Password:

Risk and Issues

Number	Description	Mitigation	Owner	Status
1	<p>Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act.</p> <p>There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.</p>	<p>1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard</p> <p>2 - Store data in an easily accessible format</p> <p>3 - Be as transparent as possible e.g. UAT in GitHub</p>	[REDACTED]	Closed
2	<p>Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>There will be a six week period of support for the new service. There have been a number of iterations in design. We have added a whole new section based on user research.</p>	[REDACTED]	Closed
3	<p>Deskpro secure email is currently unsupported on a day to day basis</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>Customer Service Group have agreed to support the deskpro service.</p>	[REDACTED]	Closed
4	<p>We do not understand the supporting end to end business process for the indeterminate outcome e.g. will the existing contract review service be available.</p> <p>See Assumption No. 2</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p>	[REDACTED]	Closed
5	<p>Gov.uk content designer will not be available until June. There is a risk to the scrum in terms of managing the end to end language, tone and navigation from Gov.uk guidance and then into the tool.</p>	<p>This is mitigated by using a common style guide and [REDACTED] kindly offered to talk if we had any major concerns.</p> <p>Content designer allocated. We have access to Gov.uk content via Sharepoint.</p> <p>Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)</p>	[REDACTED]	Closed

Check Employment Status for Tax - Sprint Review - 4 September

PRODUCT VISION

Users

Primary:

- Public sector employers
- Large and medium private sector employers
- Small private sector employers

Secondary:

- Intermediaries and workers may also use the product
- Recruitment agencies (fee payers)

Needs

How will it meet a user's needs:

- Allow both public and private sector users to correctly administer the worker's payment for tax purposes
- Allow users to be able to answer questions that will give an accurate assessment of a worker's status
- Allow users to easily understand the purpose of the tool, and the next steps
- Allow users to submit feedback
- Allow users to get help using the tool

Product Goals

What are the key goals for the product:

- Ensure the product meets the needs of the private sector
- Ensure that the service addresses business on own account
- Ensure that the questions asked are clearer for the user, therefore leading to more accurate results
- Improve/clarify the content, so that it's clearer and more understandable for the user
- Improve the overall user journey through iterative user research
- Create an exit survey

Goals for this Sprint

- Continue testing Business on Own Account designs
- Add Business on Own Account Decision Service (**Unblocked**)
- Logic for check your answer logic for Business on Own Account
- Extract stable English content for translation
- Decommission old decision service

Decision and Assumption Logs			
Number	Decision	Decision Maker	Date
1	Indeterminate answer due to complexity is an acceptable outcome for CEIT	Agreed at inception point	05/03/2019
2	Test based approach to entry	Agreed Sprint Review	02/03/2019
3	Subjunctive of result page	Agreed Sprint Review	02/03/2019
4	Mutuality of Obligation: there will be no questions on MOO introduced into the digital service. There will be an iMARC paper detailing the iMARC approach to MOO.	Face to Face	10/04/2019
5	Multiple engagements (Business on own account). This will not be directly addressed within the digital service. This is because the scope of the work of the service cannot answer the questions	Face to Face	10/04/2019
6	Test structure reasonable risk. Agreed that structure could be changed in response to user needs separately around reasonable care and risk.	Face to Face	10/04/2019
7	Particular obligations: These do not have to be addressed in the digital service	Face to Face	10/04/2019
Number	Assumption	Date	
1	Discussed with PwC but on a single call (25/04/2019 11:00 - 12:00 GMT) it is not currently in scope. User need identified a more appropriate route by public facing MP.	25/04/2019	
2	Business process for dealing with "indeterminate" response is unchanged for content purposes.	25/04/2019	

Done during this sprint

Development

- Stable English content extracted for Welsh translation ✓
- Business on own Account check your answers ✓
- Old decision service decommissioned ✓
- Additional content for set up section ✓
- Accessibility feature in add details page ✓
- Error message when “page not found” when URL are changed ✓

Over to the Dev team

Done during this sprint

Design

- 4 Business On Own Account questions designed and out for testing (Stable)
- Unblocked - the period of time for multiple engagements
- Design stabilised for Business On Own Account stabilised and takes into account determinations given by BOOA

Over to to demo the Business on Own Account flow.

Done during this sprint

- Users are all still saying how much of an improvement this version of the tool is compared to the original version
- All users were able to complete the tool
- Users are having to result to 'nit-picking' faults with the tool, which shows they're not struggling with using or understanding it
- 'Fail-safe' message tested well and was understood by all users

- Some of the questions in the BoOA flow still need a bit of rework
- Substitution caused some confusion with the public sector representatives
 - Although this could be down to there already being concerns with it in the public sector
- More guidance could be provided on some of the questions

What we did

Dates

27th & 28th August 2019

8 Participants

- A mix of hiring managers and tax experts from the private and public sectors

How?

We conducted usability testing to understand how easily users could find and navigate through the CEST tool

Done during this sprint

It's a team sport

Round 11
Usability
Research findings
have been
distributed

Link to:

[User Research](#)

What do we propose

Based on our learning, what do we propose

- *Continue testing Business on Own Account designs*
- *Add Business on Own Account Decision Service*
- *Add navigation for Business on Own Account*
- *Extract stable English content for translation*

Roadmap

	Sprint 8	Sprint 9	Sprint 10	Sprint 11	Sprint 12	Sprint 13	Sprint 14	Sprint 15	Sprint 16
	30/05/19 - 12/06/19	13/06/19 - 26/06/19	27/06/19 - 10/07/19	11/07/19 -24/07/19	25/07/19 - 07/08/19	08/08/19 - 21/08/19	22/08/19 - 4/09/19	05/09/19 -18/09/19	19/09/19 - 3/10/19
User type (Persona)									
Methodology	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	Usability testing	
Location									
Events	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review
Assurance Events	Research, Accessibility & Design					Research, Accessibility & Design	GDS Standards Assessment		
Products									
Design	Iterating	Iterating	Business On Own Account	Business On Own Account	Business On Own Account	Business On Own Account	Business On Own Account	Business On Own Account	
Development	Exit (Tailored) Welsh Language New Service (extract for translation)	Working arrangement sections	July MVP in production but not live External penetration testing Technical Spike to look at back end micro-service refactor and additional weighted items	Iterating production code	Iterating production code	Iterating production code	Iterating production code	Welsh Language - Deploy DAC (External Accessibility Testing)	October MVP

Last updates made: **Added Research, Accessibility & Design review in August**

Thank you

Useful Links:

Analytics



Username:

Password:

Risk and Issues

Number	Description	Mitigation	Owner	Status
1	<p>Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act.</p> <p>There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.</p>	<p>1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard</p> <p>2 - Store data in an easily accessible format</p> <p>3 - Be as transparent as possible e.g. UAT in GitHub</p>	[REDACTED]	Closed
2	<p>Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>There will be a six week period of support for the new service. There have been a number of iterations in design. We have added a whole new section based on user research.</p>	[REDACTED]	Closed
3	<p>Deskpro secure email is currently unsupported on a day to day basis</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>Customer Service Group have agreed to support the deskpro service.</p>	[REDACTED]	Closed
4	<p>We do not understand the supporting end to end business process for the indeterminate outcome e.g. will the existing contract review service be available.</p> <p>See Assumption No. 2</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p>	[REDACTED]	Closed
5	<p>Gov.uk content designer will not be available until June. There is a risk to the scrum in terms of managing the end to end language, tone and navigation from Gov.uk guidance and then into the tool.</p>	<p>This is mitigated by using a common style guide and [REDACTED] kindly offered to talk if we had any major concerns.</p> <p>Content designer allocated. We have access to Gov.uk content via Sharepoint.</p> <p>Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)</p>	[REDACTED]	Closed

Check Employment Status for Tax - Sprint Review - 1st May

PRODUCT VISION

Users

Primary:

- Public sector employers
- Large and medium private sector employers

Secondary:

- Intermediaries and workers may also use the product
- Specific user groups
- Agencies

Needs

How will it meet a user's needs:

- Allow both public and private sector users to correctly administer the worker's payment for tax purposes
- Allow users to be able to answer questions that will give an accurate assessment of a worker's status
- Allow users to easily understand the purpose of the tool, and the next steps
- Allow users to submit feedback
- Allow users who work in specific industries to quickly exit the tool
- Allow users to perform more than one check in a session (not having to start again)
- Allow users to get help using the tool

Goals for this Sprint

- Continue creating and testing the task driven entry points
- Continue creating and testing in service content that is relevant to the user
- Continue creating and testing tailored results page
- Starting addressing pain points in current content
 - personalised tone You and Your And Them
- Complete refactoring

e.g. lack of

Decision and Assumption Logs

Created by Marc Tyers, last modified just a moment ago

Number	Decision	Decision Maker	Date
1	Indeterminate answer due to complexity is an acceptable outcome for CEST	Agreed at inception event	20/02/2019
2	Task based approach to entry	Agreed Sprint Review	22/03/2019
3	Tailoring of result page	Agreed Sprint Review	22/03/2019
4	Mutuality of Obligation - there will be no questions on MOO introduced into the digital service. There will be an HMRC paper detailing the HMRC approach to MOO.	Face to Face	10/04/2019
5	Multiple engagements (Business on own account). This will not be directly addressed within the digital service. This is because the some of the users of the service cannot answer the questions.	Face to Face	10/04/2019
6	Tool Structure (reasonable care). Agreed that structure could be changed in response to user needs especially around reasonable care and risk.	Face to Face	10/04/2019
7	Particular occupations. These do not have to be addressed in the digital service.	Face to Face	10/04/2019

Number	Assumption	Date
1	Discussed with PM/BA on a Skype call 29/04/2019 11:30 - 12:30. CEST 2 is not currently in scope. User need identified is more appropriately met by public facing API.	29/04/2019
2	Business process for dealing with "indeterminate" response is unchanged. For content purposes.	29/04/2019

Done during this sprint

Design

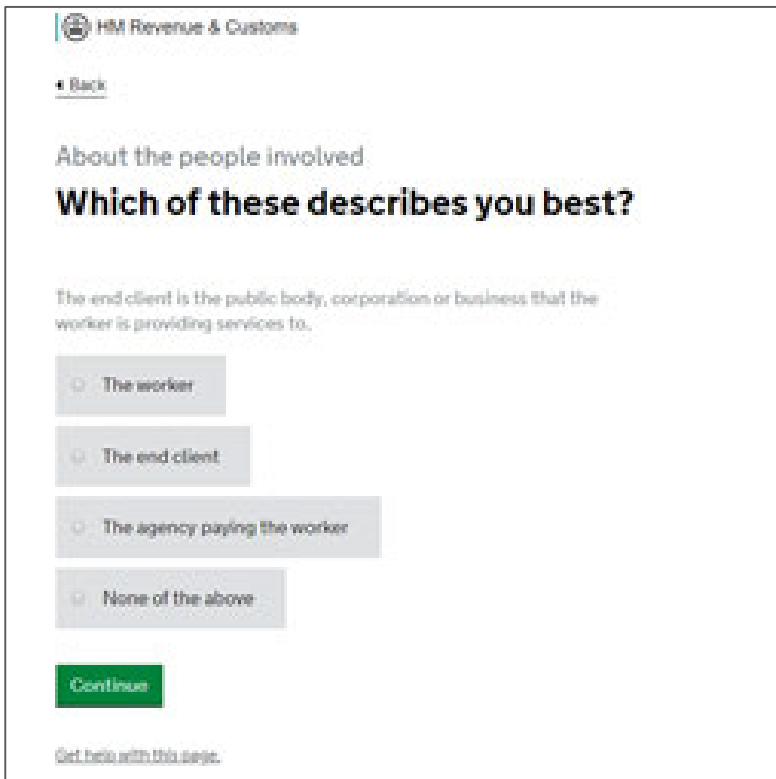
- Task driven entry points
- Tailored results page
- New content throughout

<https://www.prototypes.tax.service.gov.uk/check-employment-status-for-tax-prototype/>

Username: prototypes

Password: redacted

Starting addressing pain points in current content (lack of personalised tone You and Your And Them)



HM Revenue & Customs

[Back](#)

About the people involved

Which of these describes you best?

The end client is the public body, corporation or business that the worker is providing services to.

The worker

The end client

The agency paying the worker

None of the above

[Continue](#)

[Get help with this page.](#)

Out for review/sign off - xxxx sent 29/04/2019

Although CEST asks the user who they are (end client, worker etc), it currently ignores the selection made by the user:

We intend to use the decision made by the user on this page to allow tailored content to be displayed.

- If the user chooses “The worker”, the user will see content that is tailored to them.
- If the user chooses “The end client”, the user will see content that is tailored to their organisation.
- If the user chooses “The agency paying the worker”, the user will see the same content that is currently live (this won't be changed).

Note: only the **tone** of the pages will change. The question and answer intent/meaning will remain unchanged.

Optimised Content Screens

Prototype pages - 23rd April 2019
For Round 3 Usability Testing

BETA This is a new service – your [feedback](#) will help us to improve it.

Employed or self-employed? In or out of IR35? Use this tool to find out

This tool has been created for individuals and hirers, to find out who is regarded as self-employed for tax purposes.

And to determine whether a job or contract, and its working conditions (not the individual) is deemed employment and should be taxed at source (PAYE).

Use the tool for current or future roles, in the private or public sector. And to reassess a role's status when its scope, or the way it works, changes.

Please choose answers that most closely describe how the work is done. At the end, you can check and change your answers. Before confirming them to get a result, which you can print or download.

No information, data or results are stored.

Before you start

There are six groups of questions, which are described below. You may want to read this and further guidance about them first.

- ▶ [1: About you](#)
- ▶ [2: The worker's duties](#)
- ▶ [3: People who help or work instead of you](#)
- ▶ [4: The working arrangements](#)
- ▶ [5: The worker's financial risk](#)
- ▶ [6: Working with the hiring company](#)

Start now >

You'll need to know:

- The worker's responsibilities
- Who decides what work needs doing
- Who decides when, where and how the work's done
- How the worker will be paid
- If the engagement includes any benefits or reimbursement for expenses.

Related content

[Employment Status](#)

[Working for yourself](#)

Detailed guidance

[Apply the off-payroll working rules \(IR35\) in the private sector](#)

[The intermediaries legislation \(known as IR35\)](#)

[Off-payroll working in the public sector rules](#)

[Employment status: employed or self-employed](#)

Proposed Guidance
(Out of scope for
scrum team)

About this result Task

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About your result

HMRC will stand by the result given, unless a compliance check finds the information you've provided isn't accurate.

HMRC won't stand by results achieved through contrived arrangements, designed to get a particular outcome from the service. This would be treated as evidence of deliberate non-compliance with associated higher penalties.

[Continue](#)

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

About you

Which of these describes you best?

- I want to find out if I am employed/self-employed
- I want to find out if I need to apply PAYE to someone who is working for me
- I want to find out if a contract I am, or could be, working on falls within IR35
- I want to find out if a contract my organisation is recruiting for falls within IR35
- I want to find out if a contract I'm recruiting for, on behalf of another organisation, falls within IR35

Continue

User Task

“Do I pay them PAYE” question rather than declaration


I want to find out if I need to pay someone who's working for me within PAYE

“I want to find out if I need to apply PAYE to someone who is working for me”

/live_v2/describeYou2

Intermediary

Worker

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About the people involved


Are you trading through a limited company, partnership or unincorporated body?

Yes No

[Continue](#)

/live_v2/worker/intermediary

Hirer

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About the people involved

Is the worker trading through a limited company, partnership or unincorporated body?

Yes No

[Continue](#)

/live_v2/hirer/intermediary

Same for worker and hirer

GOV.UK Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)


About the people involved

Is the work for a private sector business?

Yes No

[Continue](#)

Same for worker and hirer

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About the people involved

Does this business have more than:

Only select the options that apply

£10.2 million annual turnover?

£5.1 million on their balance sheet?

50 employees?

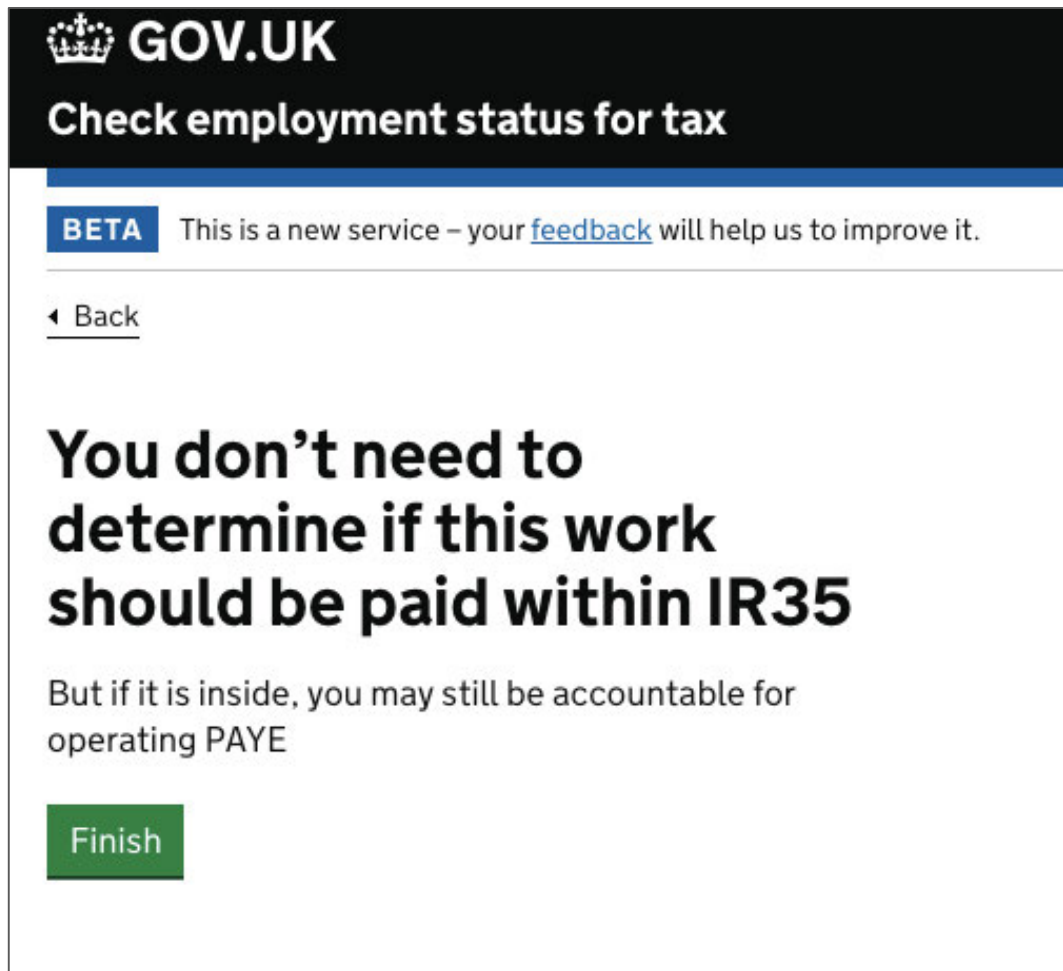
None of the above

[Continue](#)

Advisories and Exits

Agency Exit

Full stops in H2



The screenshot shows a GOV.UK page with a black header containing the crown logo and 'GOV.UK' text. Below the header is a blue bar with the title 'Check employment status for tax'. A blue box labeled 'BETA' is followed by the text 'This is a new service – your [feedback](#) will help us to improve it.' Below this is a link '◀ Back'. The main content area features a large heading: 'You don't need to determine if this work should be paid within IR35'. Underneath is a paragraph: 'But if it is inside, you may still be accountable for operating PAYE'. At the bottom is a green button labeled 'Finish'.

GOV.UK

Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

You don't need to determine if this work should be paid within IR35

But if it is inside, you may still be accountable for operating PAYE

Finish

M/L Private Sector Business: Exit OR continue

FULL STOPS NEEDED IN
H2

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

You don't need to answer any more questions.

Until April 2020, workers are responsible for determining if roles like this should be in or out of IR35


You can exit the tool now. Or continue through it, to see how other factors determine the employment status of this work and for your future reference

[Finish](#)

[Continue through tool](#)

Public Sector Worker: Exit OR continue

FULL STOPS NEEDED IN
H2

 **GOV.UK**

Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

You don't need to answer any more questions

The organisation offering the work is responsible for determining if it should be in or out of IR35

You can exit the tool now. Or continue through it, to see how other factors determine the employment status of this work for your own records


[Finish](#)

[Continue through tool](#)

Personal Service Section

Engagement Started?

Worker

 **GOV.UK** Check employment status for tax

[◀ Back](#)

About the people involved


Have you already started working for this client?

Yes No

[Continue](#)

/live_v2/worker/contractStarted

Hirer

 **GOV.UK** Check employment status for tax

[◀ Back](#)

About the people involved


Has the worker already started working for your organisation?

Yes No

[Continue](#)

/live_v2/hirer/contractStarted

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

About the worker's duties

Will you ever be required to act for this client, as:

- a board member?
- a treasurer or trustee?
- a company director, company secretary or holder of another official position?

For the purposes of this tool, the 'end client' is the organisation that directly benefits from the work you do.


Yes No

**Does it need this disclosure?
There's no mention of "end client" in the question.**

[Continue](#)

/live_v2/worker/officeHolder3

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

About the worker's duties

Will the worker ever have to act for your organisation, as:


- a board member?
- a treasurer or trustee?
- a company director, company secretary or holder of another official position?

Yes No

[Continue](#)

/live_v2/hirer/officeHolder3

Worker

 Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Have you ever sent someone else to do your work - without this substitute being vetted, cleared or interviewed first?

Yes. It was agreed


Yes. But it was not agreed

No. It hasn't happened

[Continue](#)

/live_v2/worker/substitute

Hirer

 Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Has the worker ever sent someone else to do their work - without this substitute being vetted, cleared or interviewed first?

Yes. It was agreed


Yes. But it was not agreed

No. It hasn't happened

[Continue](#)

/live_v2/hirer/substitute

Worker

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Did you pay your substitute directly?


Yes No

[Continue](#)

/live_v2/worker/substitutePaid

Substitute Paid? (Engagement Started)

Hirer

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers


Did the worker pay their substitute directly?

Yes No

[Continue](#)

/live_v2/hirer/substitutePaid

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Would this client allow you to send someone else to do your work - without your substitute being vetted, cleared or interviewed first?


Yes No

[Continue](#)

/live_v2/worker/ifSubstitute

If Substitute (Engagement NOT Started)

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Would your organisation allow the worker to send someone else to do their work - without this substitute being vetted, cleared or interviewed first?

Yes No


[Continue](#)

/live_v2/hirer/ifSubstitute

If Substitute Paid? (Engagement NOT Started)

Worker

Hirer

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.


[◀ Back](#)

About substitutes and helpers

Would you have to pay your substitute directly?

Yes No

[Continue](#)

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Would the worker have to pay their substitute directly?


Yes No

[Continue](#)

/live_v2/worker/ifSubstitutePaid

/live_v2/hirer/ifSubstitutePaid

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers


Have you paid another person to do a significant amount of this work?

Yes No

[Continue](#)

/live_v2/worker/helper

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

About substitutes and helpers

Has the worker paid another person to do a significant amount of this work?


Yes No

[Continue](#)

/live_v2/hirer/helper

Control Section

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

The working arrangements

Could your client change your original task, project or location?

Yes. With your agreement


Yes. Without your agreement

No

[Continue](#)

/live_v2/worker/controlTask

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

The working arrangements

Could your people change the worker's original task, project or location?

Yes. With their agreement


Yes. Without their agreement. ← Remove full stop

No

[Continue](#)

/live_v2/hirer/controlTask

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The working arrangements


Will your client specify exactly how they want the work done without your input?

- Yes
- No. You solely decide how the work is done
- No. Because it is highly skilled work
- Partly. Your client and you agree how the work is done

[Continue](#)

/live_v2/worker/controlHow

Hirer




 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The working arrangements

Will your people specify exactly how they want the work done, without the worker's input?


- Yes
- No. The worker solely decides how the work is done. 
- No. Because it is highly skilled work. 
- Partly. Your people and the worker agree how the work will be done. 

[Continue](#)

/live_v2/hirer/controlHow

Remove full stops

Worker

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

The working arrangements

Will your client decide your schedule of working hours?

Yes

No


Partly. Your client and you agree your own schedule

Not applicable. The work is based on agreed deadlines, not a set schedule

[Continue](#)

/live_v2/worker/controlWhen

Hirer

 **Check employment status for tax**

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

The working arrangements

Will your people decide the schedule of working hours?

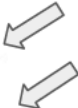
Yes

No

Partly. Your people and the worker agree their own schedule.


Not applicable. The work is based on agreed deadlines, not a set schedule.

[Continue](#)

Remove full stops 

/live_v2/hirer/controlWhen

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The working arrangements

Will you be able to choose where you work?

Yes

No. Your client decides


No. The task determines the location

Partly. Some work has to be done in an agreed location

[Continue](#)

/live_v2/worker/controlWhere

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The working arrangements

Will the worker be able to choose where they work?

Yes

No. Your people decide

No. The task determines the location

Partly. Some work has to be done in an agreed location


[Continue](#)

/live_v2/hirer/controlWhere

Financial Risk Section

Financial Risk 1 of 4: Any Expenses?

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The worker's financial risk


Will you have to provide something to deliver this work at you own cost - that can't be charged or claimed from your end client?

Yes No

[Continue](#)

/live_v2/worker/expenses

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The worker's financial risk

Will the worker have to provide something to deliver this work, at their own cost - that can't be charged or claimed from your organisation?

Yes No

[Continue](#)

/live_v2/hirer/expenses

Financial Risk 2of4: Expense Type

Worker

GOV.UK Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[Back](#)

The worker's financial risk

What will you have to provide at your own cost?

Tick all that apply

- Materials. Substantial items that you can't use in the future or charge to/claim from your client
- Equipment. This does not include personal tablets and phones but can include work-only PCs
- Vehicle. Used for work-only tasks (not commuting) including purchase, fuel and running costs
- Miscellaneous. e.g. significant non-commuting travel or accommodation external business premises, insurance and accreditation costs.

[Continue](#)

←
acomodation,
external business
premises
Remove full stop

/live_v2/worker/expenses2

Hirer

GOV.UK Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[Back](#)

The worker's financial risk

What will the worker provide at their own cost?

Tick all that apply

- Materials. Substantial items that the worker can't use in the future or charge to/claim from you
- Equipment. This does not include personal tablets and phones but can include work-only PCs
- Vehicle. Used for work-only tasks (not commuting) including purchase, fuel and running costs
- Miscellaneous. e.g. significant non-commuting travel or accommodation external business premises, insurance and accreditation costs.


[Continue](#)

←
acomodation,
external business
premises
Remove full stop

/live_v2/hirer/expenses2

Financial Risk 3of4: Pay

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The worker's financial risk


On what basis will you be compensated for this work?

- Time. An hourly, daily or weekly rate
- Price. A fixed amount for a specific project
- Amount. Based on how much work is completed
- Percentage. Of sales you generate
- Percentage. Share of your client's profits or savings

[Continue](#)

/live_v2/worker/pay

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

The worker's financial risk

On what basis will the worker be compensated for this work?


- Time. An hourly, daily or weekly rate
- Price. A fixed amount for a specific project
- Amount. Based on how much work is completed
- Percentage. Of sales the worker generates
- Percentage. Share of your organisation's profits or savings

[Continue](#)

/live_v2/hirer/pay

Financial Risk 4of4: Dispute

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

The worker's financial risk


If your client wasn't happy with your work, would you have to put it right at your cost?

- Yes. You would have to put it right, at no additional charge, and would incur extra costs in doing so
- Yes. You would have to put it right, at no additional charge, but would incur an opportunity cost
- No. You would put it right in your usual hours at your usual rate or fee
- No. You couldn't put it right because it was time-specific or for a single event
- No. You wouldn't need to put it right

[Continue](#)

/live_v2/worker/dispute

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

The worker's financial risk

If your team weren't happy with the work, would the worker have to put it right at their cost?

- Yes. The worker would have to put it right, at no additional charge, and would incur extra costs in doing so
- Yes. The worker would have to put it right, at no additional charge, but would incur an opportunity cost
- No. The worker would put it right in their usual hours at their usual rate or fee
- No. The worker couldn't put it right because it was time-specific or for a single event
- No. They wouldn't need to put it right


[Continue](#)

/live_v2/hirer/dispute

Part & Parcel Section

Part & Parcel 1 of 4: Benefits

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company

Will you be entitled to any of these benefits from your client:


- Sick pay
- Holiday pay
- Workplace pension
- Maternity/paternity pay
- Other benefits, like health insurance?

Yes No

[Continue](#)

/live_v2/worker/benefits

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company

Will the worker be entitled to any of these benefits from your organisation:


- Sick pay
- Holiday pay
- Workplace pension
- Maternity/paternity pay
- Other benefits, like health insurance?

Yes No

[Continue](#)

/live_v2/hirer/benefits

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company

Will you be responsible for any of these duties for your client?


- Hiring workers
- Dismissing workers
- Delivering appraisals
- Deciding how much to pay someone

Yes No

[Continue](#)

/live_v2/worker/duties

Part & Parcel 2of4: Duties Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company

Will the worker be responsible for any of these duties for your organisation?

- Hiring workers
- Dismissing staff
- Delivering appraisals
- Deciding staff pay levels


Yes No

[Continue](#)

/live_v2/hirer/duties

Part & Parcel 3of4: Interaction

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company


Will you interact with your client's external customers, audience or users?

Yes No

[Continue](#)

/live_v2/worker/interaction

Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company


Will the worker interact with your organisation's external customers, clients, audience or users?

Yes No

[Continue](#)

/live_v2/hirer/interaction

Worker

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company

When you interact with your client's external customers, audience or users, how do you introduce yourself?

You work for their organisation


You are an independent worker acting on their behalf

You work for your own business

[Continue](#)

/live_v2/worker/identity

Part & Parcel 4 of 4: Identity Hirer

 **GOV.UK** Check employment status for tax

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Working with the hiring company

When the worker interacts with your external customers, clients, audience or users, how do they introduce themselves?

They work for your organisation

They are an independent worker acting on your organisation's behalf

They work for their own business

[Continue](#)

/live_v2/hirer/identity

BETA This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

Review your answers in each section below

[Open all](#)

1. About you –

Which of these describes you best?	I want to find out if a contract my organisation is recruiting for falls within IR35	Change
Is the worker trading through a limited company, partnership or unincorporated body?		Change
Is the work for a private sector business?	Yes	Change
Does this business have more than £10.2 million annual turnover?	Yes	Change
Does this business have more than £5.1 million on their balance sheet?	No	Change
Does this business have more than 50 employees?	No	Change

2. The worker's duties +

3. People who help or work instead of you +

4. The working arrangements +

5. The worker's financial risk +

6. Working with the hiring company +

Confirm answers to get your result

By submitting your answers, you confirm the information you've provided is, to the best of your knowledge, correct. That it reflects the actual, or expected, working practices of this role. And that if these change, you also accept your result may no longer hold.

[Confirm for result](#)

Check answers

PAYE determination (No Intermediary)

WORKER

Your income from this work should be taxed within PAYE

Why are you getting this result?

Your answers suggest that you should be deemed as employed for tax purposes.

You should now do the following:

Show this to the hirer and request that your earnings from this contract are paid within PAYE.

You can save, print or export a PDF copy of your answers and result for future reference.

[Get a copy of your result](#)

HIRER

You should operate PAYE for this contract.

Why are you getting this result?

Your answers suggest the worker on this contract is deemed employed for tax purposes.

You should now do the following:

Ensure earnings from this contract are paid within PAYE.

You can save, print or export a PDF copy of your answers and result for future reference.

[Get a copy of your result](#)

Result (Inside)

IR35 determination (Intermediaries Legislation)

WORKER

Your income from this contract should be taxed within PAYE.

Why are you getting this result?

Your answers suggest that the intermediaries legislation (IR 35 regulations) applies to this contract. This means you would be deemed as employed for tax purposes for working on it.

You should now do the following:

Show this to the hirer and request that your earnings from this contract are paid within PAYE.

You can save, print or export a PDF copy of your answers and result for future reference.

[Get a copy of your result](#)

HIRER

You should operate PAYE for this contract.

Why are you getting this result?

Your answers suggest that the intermediaries legislation (IR 35 regulations) applies to this contract. This means a contractor working on it is deemed employed for tax purposes.

You should now do the following:

Ensure earnings from this contract are paid within PAYE.

You can save, print or export a PDF copy of your answers and result for future reference.

[Get a copy of your result](#)

PAYE determination (No Intermediary)

WORKER

Add details to this result for your records

Before you download your result, you can enter any information you'd like recorded on it, in the fields below. This is optional and no data will be stored by HMRC.

Your name

Your business's name

Name/project/title of work

Reference (for example, contact or hirer's name and/or date)

Continue

HIRER

Add details to this result for your records

Before you download your result, you can enter any information you'd like recorded on it, in the fields below. This is optional and no data will be stored by HMRC.

Your name

Name of business providing the work

Name/project/title of work

Reference (for example, contact or hirer's name and/or date)

Continue

Customise Result

IR35 determination (Intermediaries Legislation)

WORKER

Add details to this result for your records

Before you download your result, you can enter any information you'd like recorded on it, in the fields below. This is optional and no data will be stored by HMRC.

Your name

Name of end client issuing the contract and/or agency

Name/project/title of contract

Reference (for example, contact or hirer's name and/or date)

Continue

HIRER

Add details to this result for your records

Before you download your result, you can enter any information you'd like recorded on it, in the fields below. This is optional and no data will be stored by HMRC.

Your name

Name of your organisation

Name/project/title of contract

Reference (for example, contact or hirer's name and/or date)

Continue

Done during this sprint

It's a team sport and it is going on today and tomorrow

Pictures redacted

Round 2 Usability
Findings and
Contextual
Research
Findings have
been distributed

Done during this sprint

Development

Refactored code in Staging environment

Wedi'i rwystro

Performance testing



Back Button in browser fixed



Date and time stamp on PDF



Monitoring



Over to Wayne

What do we propose

Based on our learning, what do we propose

With large and medium private sector users

- *Continue iterating and testing the task driven entry points*
- *Continue iterating and testing in service content that is relevant to the user*
- *Continue iterating and testing tailored results page*
- *Deploy refactored code*
- *Deploy personalised journeys (subject to sign off) in existing service*
- *Deploy Welsh (subject to sign off by Welsh Unit)*

Roadmap

	Pre-Discovery & Discovery		Alpha/Beta									
	Sprint 0	Sprint 1	Sprint 2	Sprint 3	Sprint 4	Sprint 5	Sprint 6	Sprint 7	Sprint 8	Sprint 9	Sprint 10	
	06/02/19 - 19/02/19	20/02/19 - 06/03/19	07/03/19 - 20/03/19	21/03/19 - 03/04/19	04/04/19 - 17/04/19	18/04/19 - 01/05/19	02/05/19 - 15/05/19	16/05/19 - 29/05/19	30/05/19 - 12/06/19	13/06/19 - 26/06/19	27/06/19 - 10/07/19	
User type (Persona)	- Contractors 'workers' (internal HMRC staff)	- Contractors 'workers' (internal HMRC staff) - Engagers	Tax/Financial experts & Large orgs	ICEAW/CBI	Engagers/HR/Resourcing/End client	Private sector contractors	Internal HMRC (Tier 2 support)					
Methodology	Contextual inquiry	Inception event	- Round table - Contextual	- Round table - Contextual	- Usability testing - Contextual study	- Usability testing - Contextual study	- User interviews - Contextual usability testing	Usability testing	Usability testing	Usability testing		
Location	Telford office	Canary Wharf	London	Likely London								
Events		Inception Event	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review	Sprint Review		
Assurance Events									Research, Accessibility & Design	GDS Standards Assessment (Style TBA)		
Products		Product Vision User Needs		Product Backlog			Security Risk Assessment	Engage Gov.uk Content Designer				
Design							Iterating	Iterating	Iterating	Iterating	Iterating	
Development				Google Analytics Audit	Refactoring Dev Resource join scrum	Refactoring	Deploy Refactored Code Activate Welsh service Tone correct in existing service	Entry (includes Private Sector)	Exit (Tailored) Welsh Language New Service (extract for translation)	Working arrangement sections	Welsh Language - Deploy DAC (External Accessibility Testing)	

Updates made: Development Lane & Assurance Events

Thank you

Risk and Issues

Number	Description	Mitigation	Owner	Status
1	<p>Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act.</p> <p>There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.</p>	<p>1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard</p> <p>2 - Store data in an easily accessible format</p> <p>3 - Be as transparent as possible e.g. UAT in GitHub</p>		Closed
2	<p>Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>There will be a six week period of support for the new service. There have been a number of iterations in design. We have added a whole new section based on user research.</p>		Closed
3	<p>Deskpro secure email is currently unsupported on a day to day basis</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p> <p>Customer Service Group have agreed to support the deskpro service.</p>		Closed
4	<p>We do not understand the supporting end to end business process for the indeterminate outcome e.g. will the existing contract review service be available.</p> <p>See Assumption No. 2</p>	<p>Escalated to project risk register (Risk and Issues bi-weekly call)</p>		Closed
5	<p>Gov.uk content designer will not be available until June. There is a risk to the scrum in terms of managing the end to end language, tone and navigation from Gov.uk guidance and then into the tool.</p>	<p>This is mitigated by using a common style guide and [redacted] kindly offered to talk if we had any major concerns.</p> <p>Content designer allocated. We have access to Gov.uk content via Sharepoint.</p> <p>Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)</p>		Closed