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

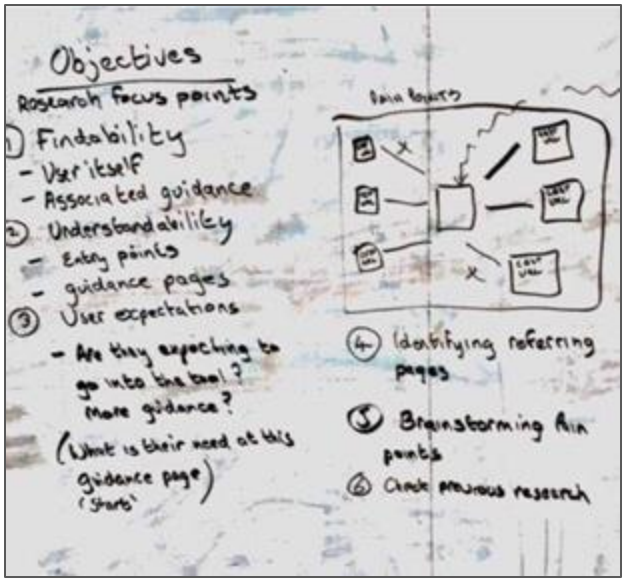
[redacted]

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

<u>Product Management</u> - Goal to understand and take ownership of backlog

Done during this sprint

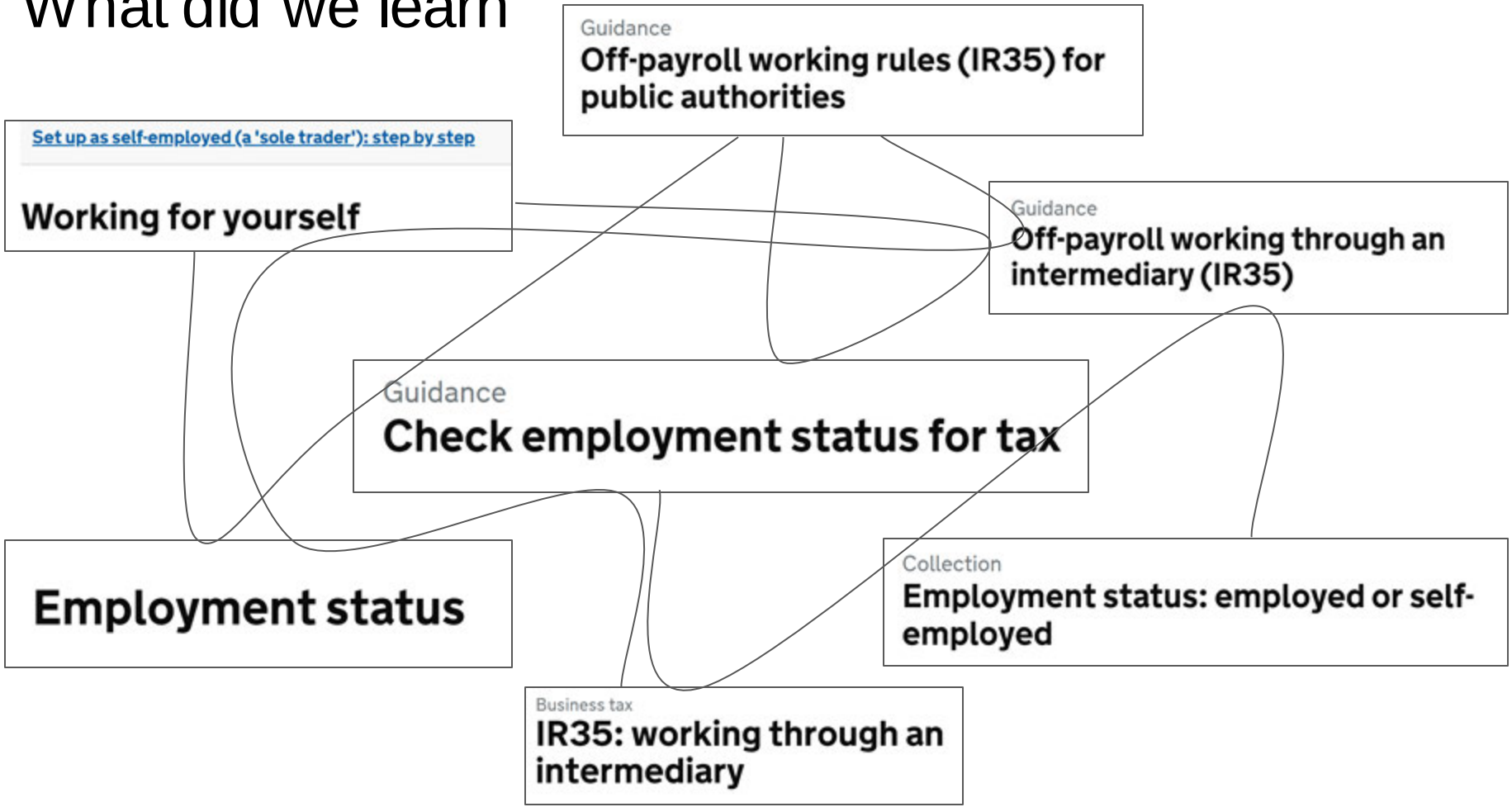
- Engaged Gov.uk Content Writer (Ticket #13374)
- Backlog handed over from Live Services
- Engaged GA performance analytics team
- Created high level EPIC stories
- Google Analytics now working (apart from period when switched off). Measures from the point of decision rather than PDF

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, Accesibility & 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 Accesibility Testing)	Welsh Language - Deploy

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

Thank you

Product Risks

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

Deskpro

What is it

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

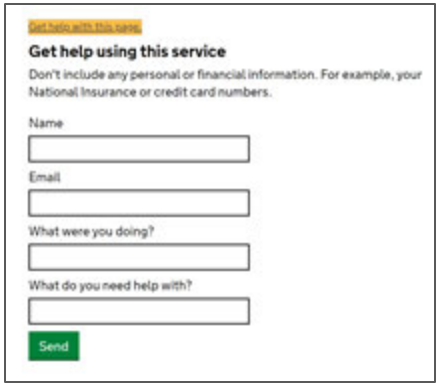
How is it accessed

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.



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)	**Tier 2 (Normally a second line team of business experts e.g. helpline)**	**Tier 3 (Live Service Scrum team)**
"I cannot access" "Where is the guidance" "When do I need to do this"	*"I provide a skateboard is that materials, equipment or a vehicle"*	*"Every time I click the @*&dy button nothing happens, typical HMRC!!!!"*
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	T2 respond using their detailed business knowledge	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)	**Tier 2 (Normally a second line team of business experts e.g. helpline)**	**Tier 3 (Live Service Scrum team)**
"I cannot access" "Where is the guidance" "When do I need to do this"	*"I provide a skateboard is that materials, equipment or a vehicle"*	*"Every time I click the @*&dy button nothing happens, typical HMRC!!!!"*
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	T2 respond using their detailed business knowledge	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

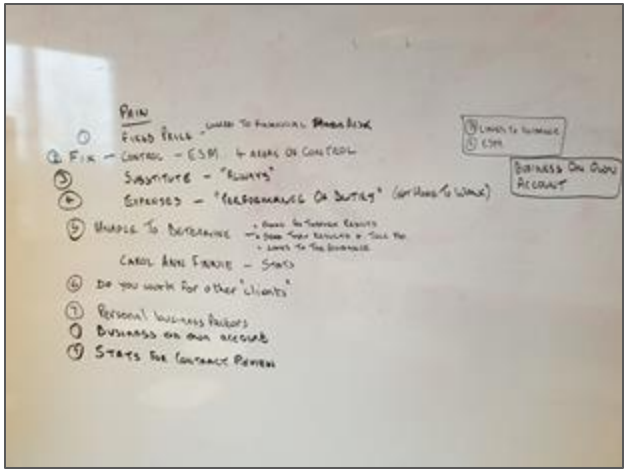
- Findability
  - How does the user find the tool?
- Understanding
  - Language in tool and guidance
- User Expectations
  - Tool and guidance

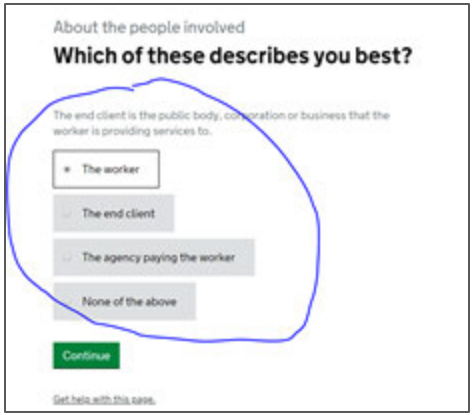
New research - on going with private sector & discuss with colleagues that speak to the users

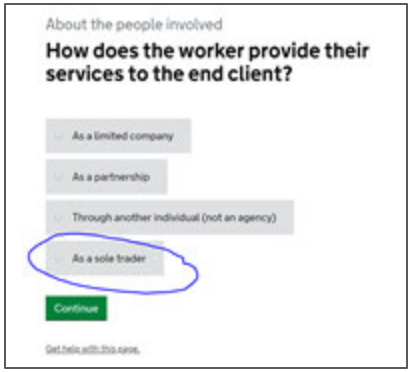
Product Management Begin prioritisation based on the product vision and prepare for usability testing

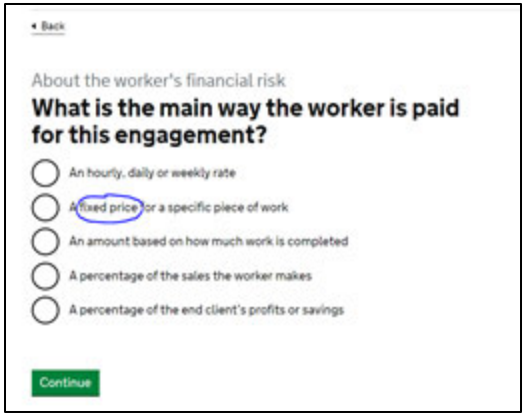
Done during this sprint

Sessions with East Kilbride and Salford





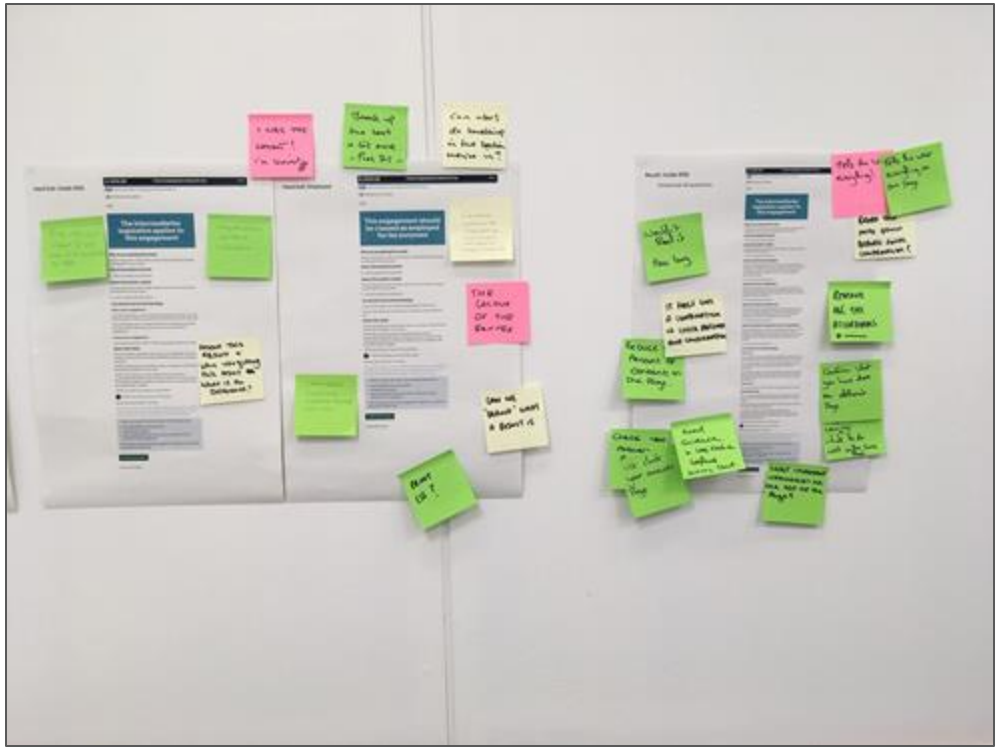




Done during this sprint

Peer reviewed results pages

Not tailored to the user



Done during this sprint

Prototype

Username:

Password:

Personas

Done during this sprint

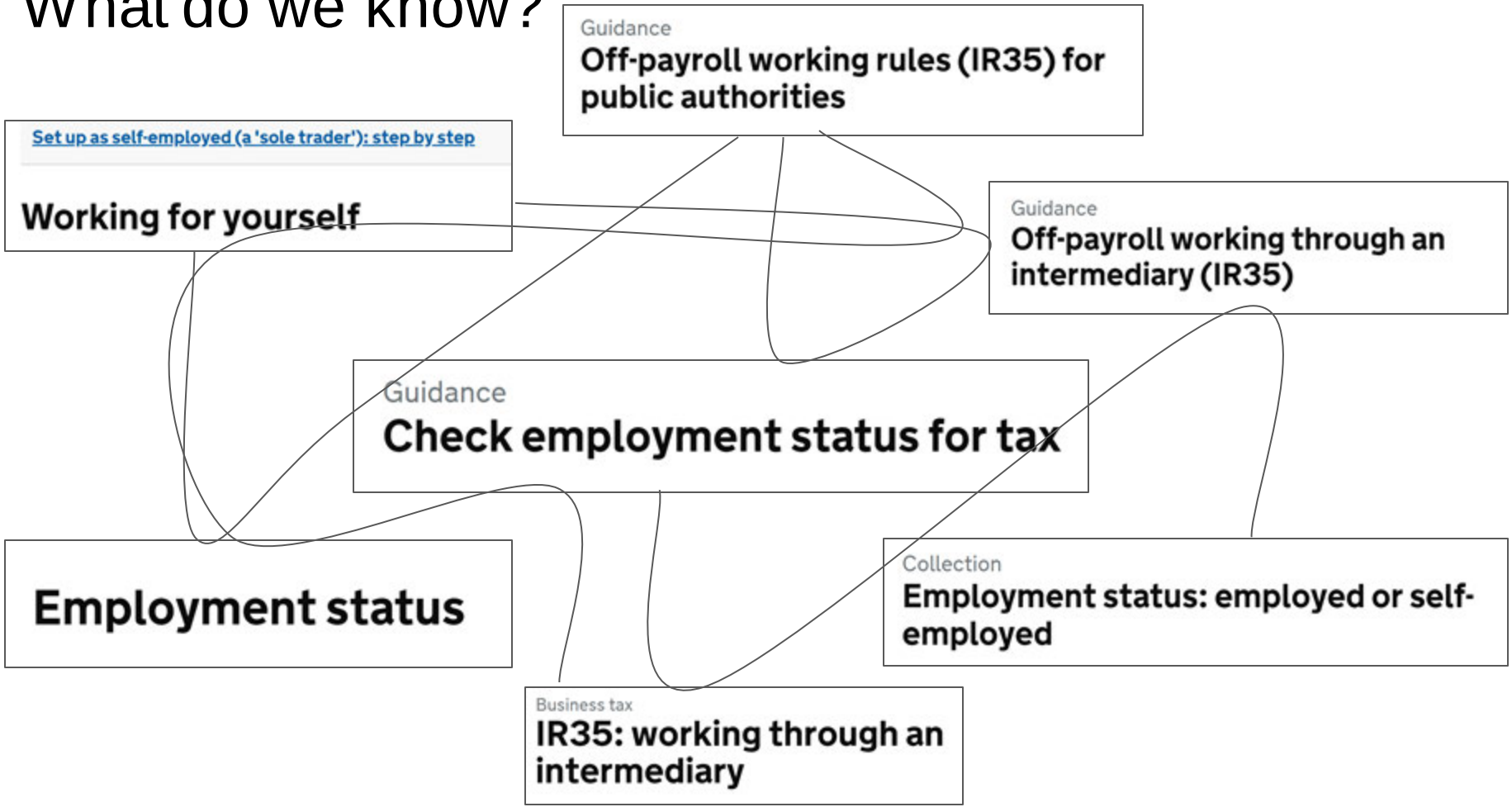
User Research

- 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?



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.

“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

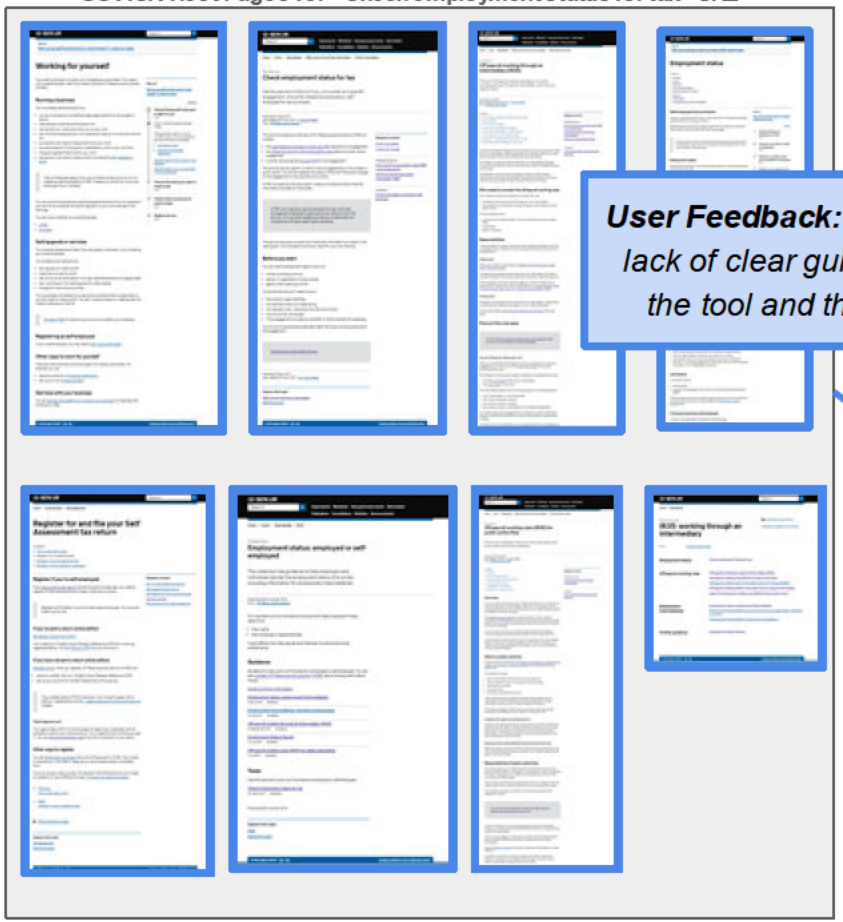
Public or Private service employing a worker through intermediary

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.

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"*

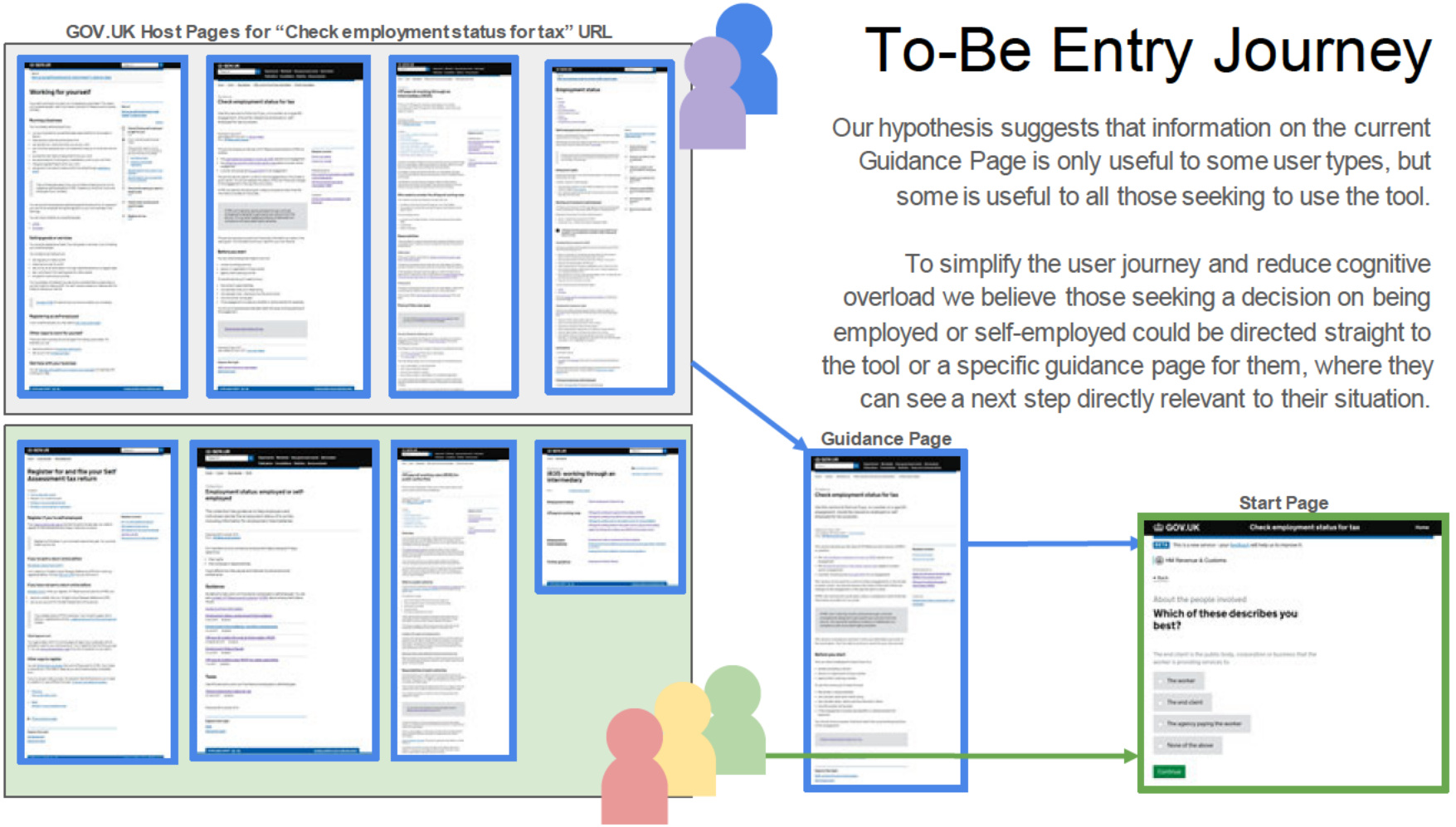
Guidance Page

Tool Start

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.

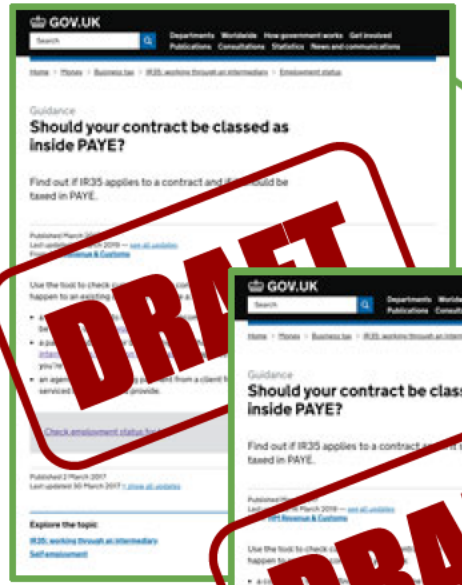


Entry Journey Improvements

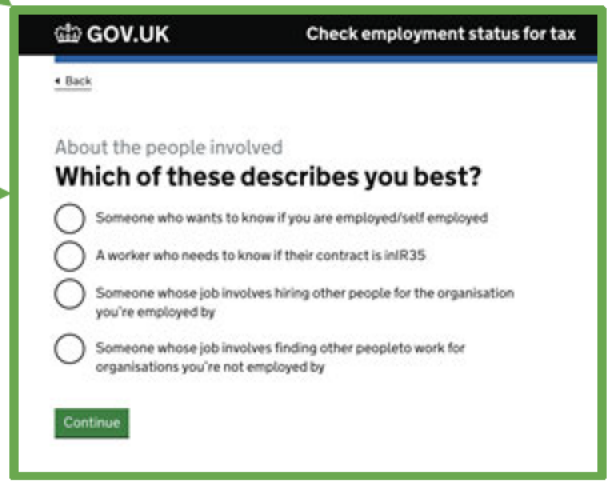
Changes may include creating two guidance pages which directly link to the tool which cater for the two specific scenarios we believe we have identified: Those wishing to understand if they are employed or self-employed, versus those seeking to understand if a contract sits in or out of IR35.

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

About IR35 Guidance Page



"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.

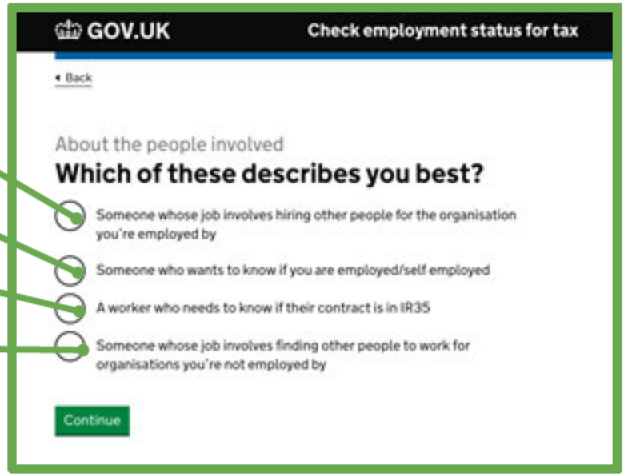
For this page to be effective, we will need to test a number of ***assumptions*** about our Users.

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

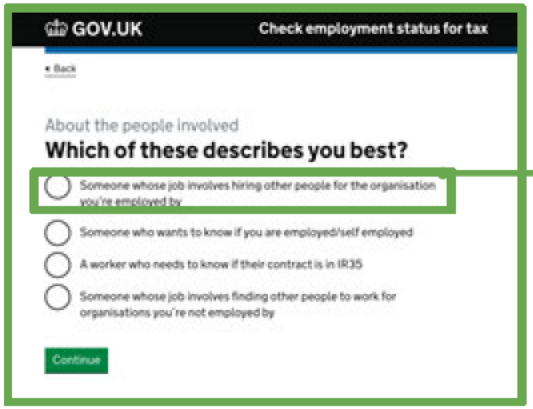
Assumption: Users, such as a contractors, will know they have an intermediary

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.



Example Task Journey:

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



Q. Is there an Intermediary?

Yes → Q. Are you hiring for the Private Sector?

No → Continue to Decision Matrix Questions

Yes → Q. Are you a small business?

No → Continue to Decision Matrix Questions

Yes → EXIT: "The worker is responsible for determining and deducting PAYE if applicable.

No → Continue to Decision Matrix Questions

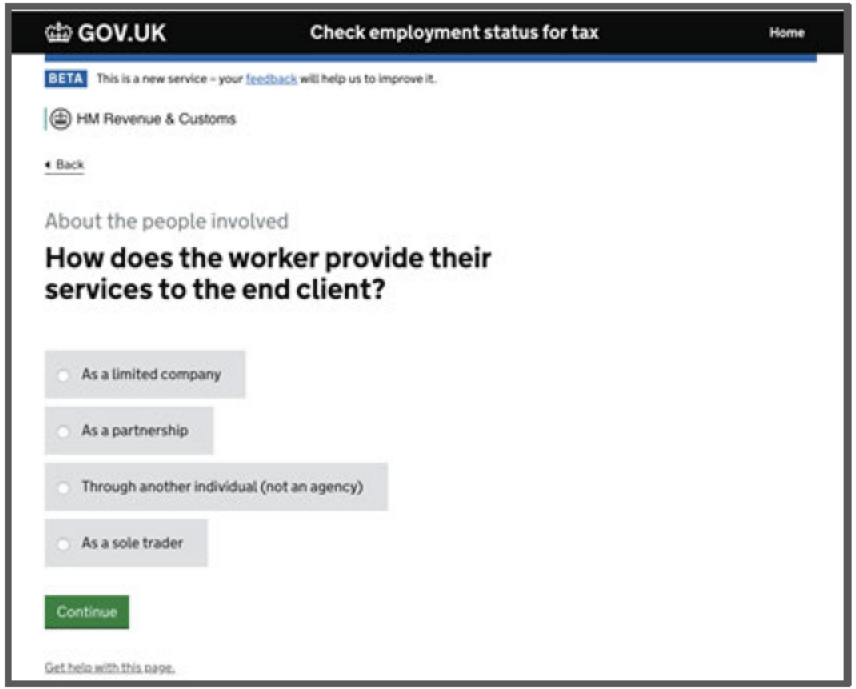
All user types receive tailored content and results based on their responses i.e. "A hirer, looking to understand how their medium sized private sector business should proceed"

Knowing the User specificities will allow us to reduce and tailor the current results pages

User Feedback:
"The whole screen is too content heavy and there doesn't seem to be any kind of order on this screen"

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:



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, Accesibility & 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

[redacted]

Number	Description	Mitigation	Owner	Status
1	Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act. There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.	1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard 2 - Store data in an easily accessible format 3 - Be as transparent as possible e.g. UAT in GitHub	[redacted]	Closed
2	Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance	**Escalated to project risk register (Risk and Issues bi-weekly call)** 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.	[redacted]	Closed
3	Deskpro secure email is currently unsupported on a day to day basis	**Escalated to project risk register (Risk and Issues bi-weekly call)** Customer Service Group have agreed to support the deskpro service.	[redacted]	Closed
4	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. **See Assumption No. 2**	**Escalated to project risk register (Risk and Issues bi-weekly call)**	[redacted]	Closed
5	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.	This is mitigated by using a common style guide and [redacted] kindly offered to talk if we had any major concerns. Content designer allocated. We have access to Gov.uk content via Sharepoint. **Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)**	[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

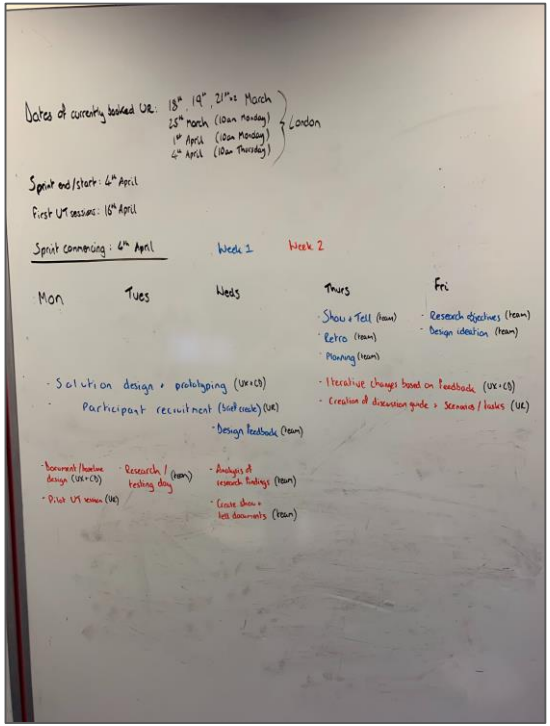
How will it meet a user's needs:

- 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

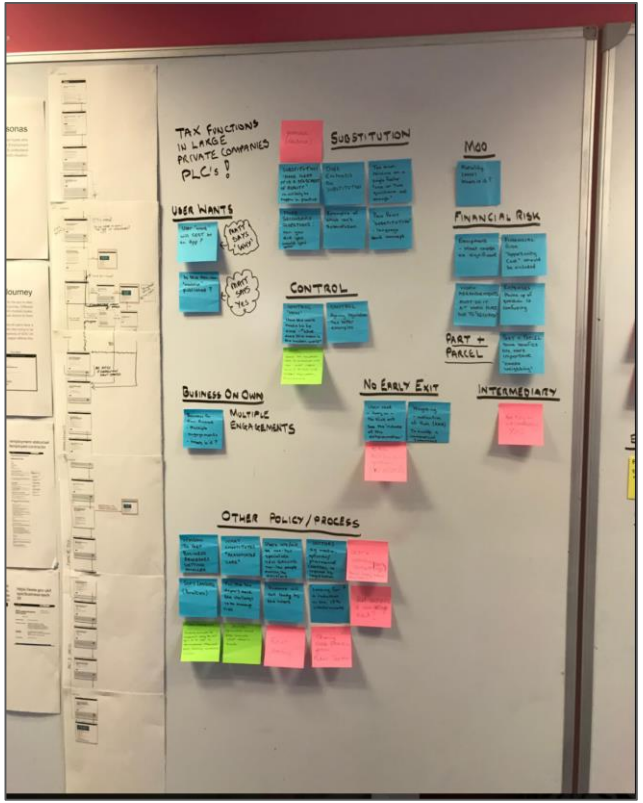
xxx will demonstrate what was taken out:

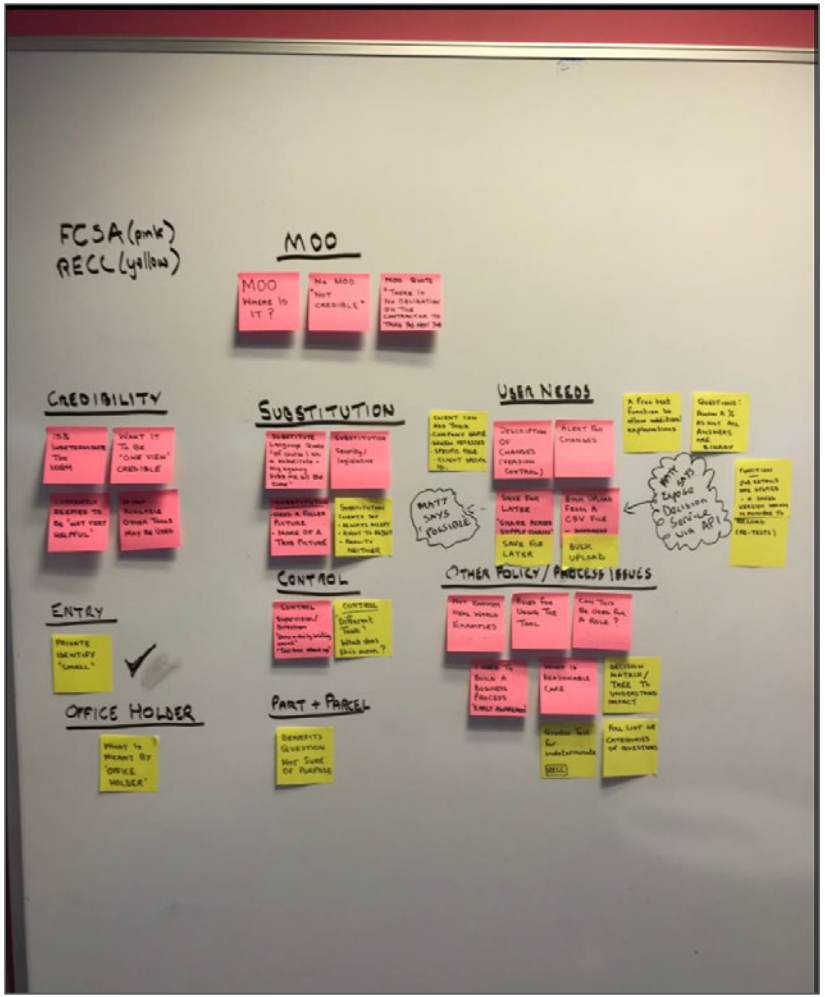
Username:

Password:

Done during this sprint

5 rounds of contextual research

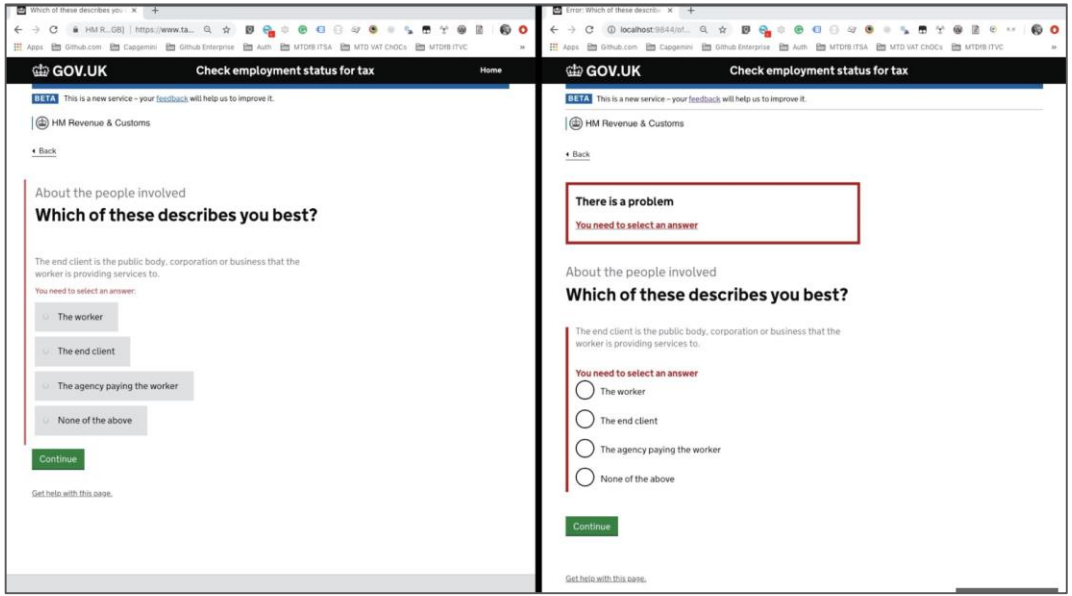




Done during this sprint

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, Accesibility & 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

[redacted]

Number	Description	Mitigation	Owner	Status
1	Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act. There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.	1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard 2 - Store data in an easily accessible format 3 - Be as transparent as possible e.g. UAT in GitHub	[redacted]	Closed
2	Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance	**Escalated to project risk register (Risk and Issues bi-weekly call)** 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.	[redacted]	Closed
3	Deskpro secure email is currently unsupported on a day to day basis	**Escalated to project risk register (Risk and Issues bi-weekly call)** Customer Service Group have agreed to support the deskpro service.	[redacted]	Closed
4	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. **See Assumption No. 2**	**Escalated to project risk register (Risk and Issues bi-weekly call)**	[redacted]	Closed
5	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.	This is mitigated by using a common style guide and [redacted] kindly offered to talk if we had any major concerns. Content designer allocated. We have access to Gov.uk content via Sharepoint. **Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)**	[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 e.g. lack of personalised tone You and Your And Them
- Complete refactoring

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

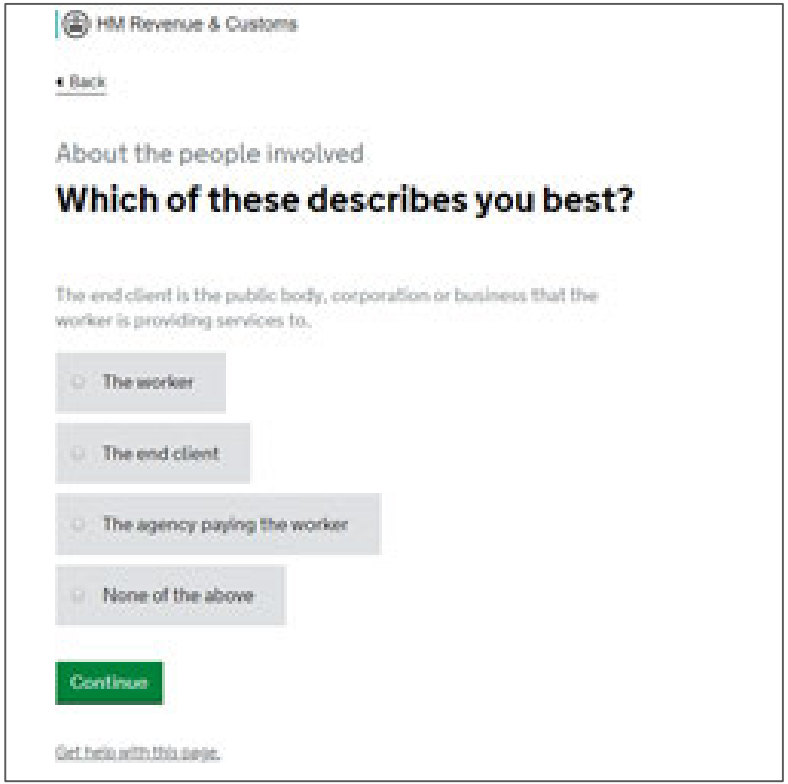
- Task driven entry points
- Tailored results page
- New content throughout

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)



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:

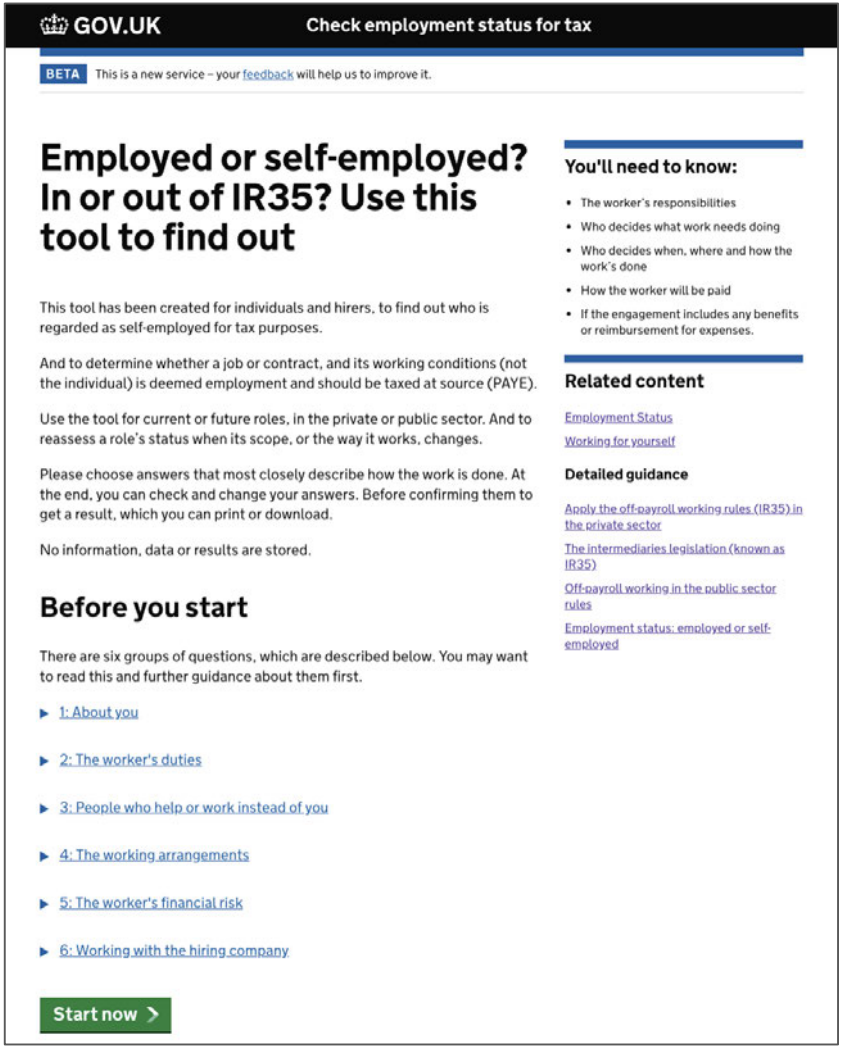
We intend to use the decision made by the user on this page to allow tailored content to be displayed.

- 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.

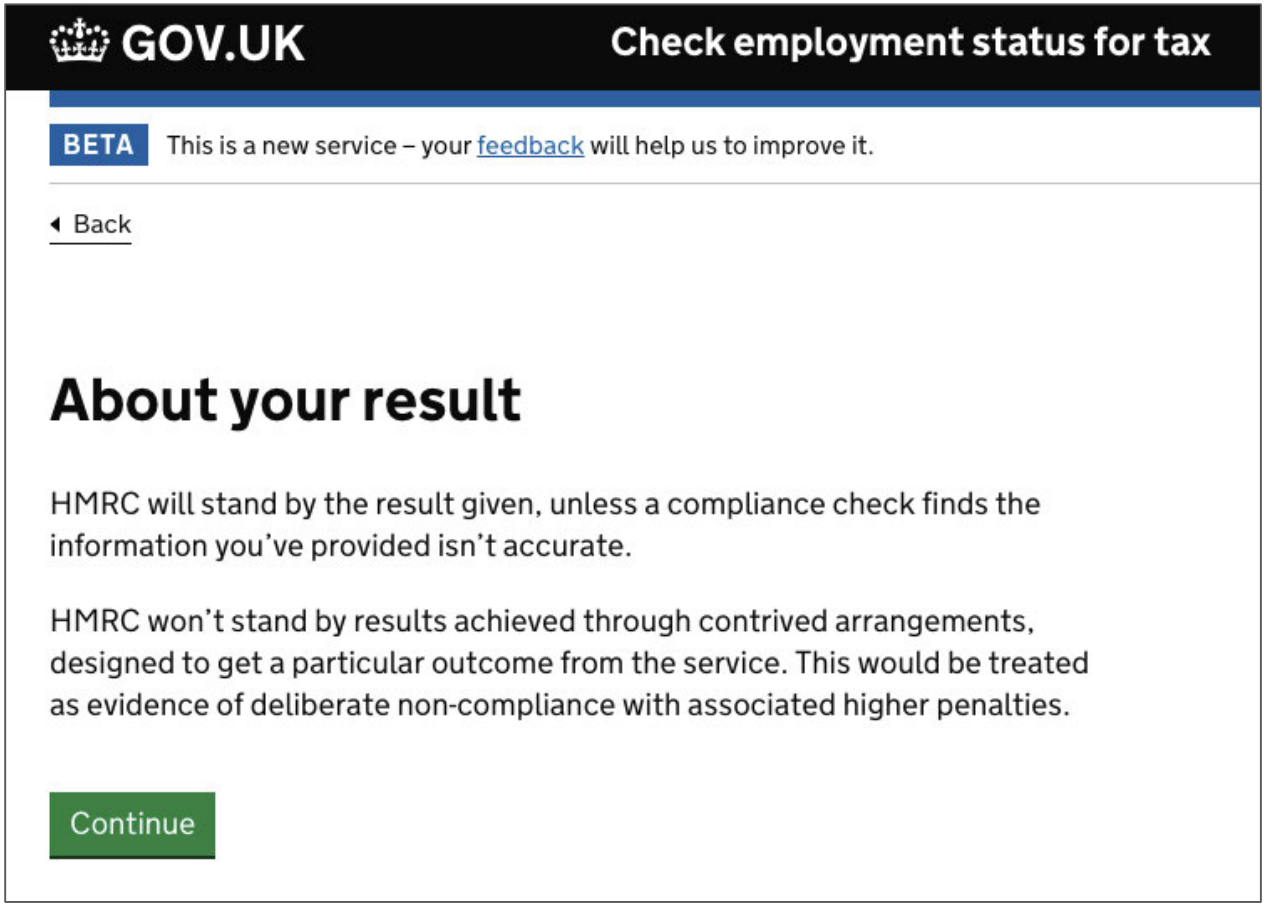
Optimised Content Screens

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

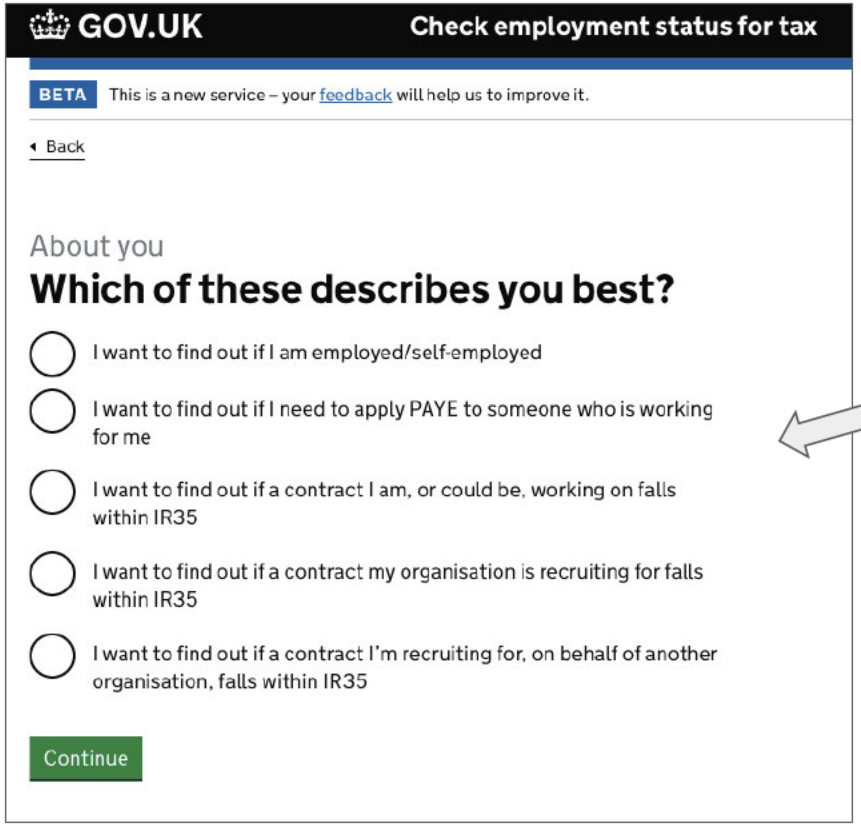


Proposed Guidance (Out of scope for scrum team)

About this result Task



User Task



/live_v2/describeYou2

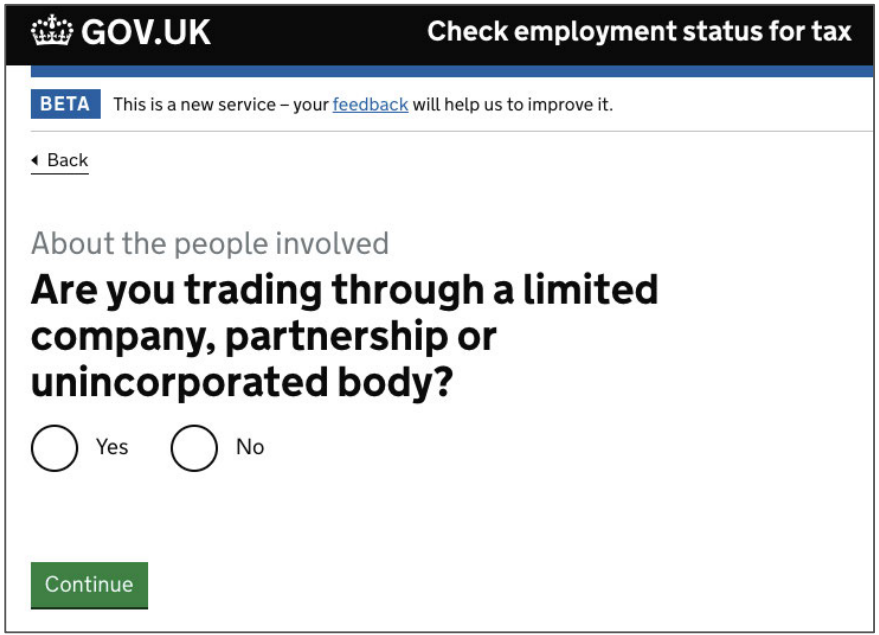
"Do I pay them PAYE" question rather than declaration

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"

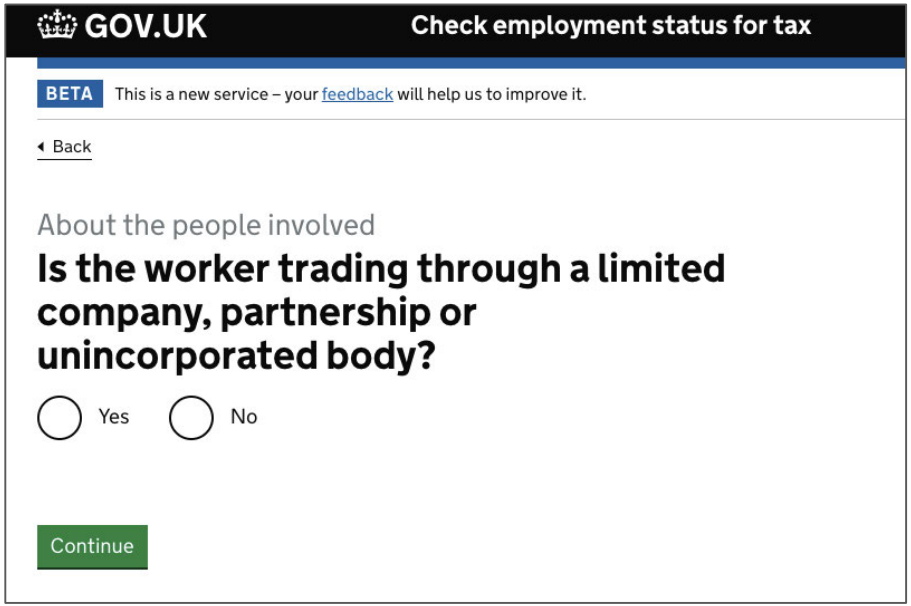
Intermediary

Worker



/live_v2/worker/intermediary

Hirer



/live_v2/hirer/intermediary

Sector

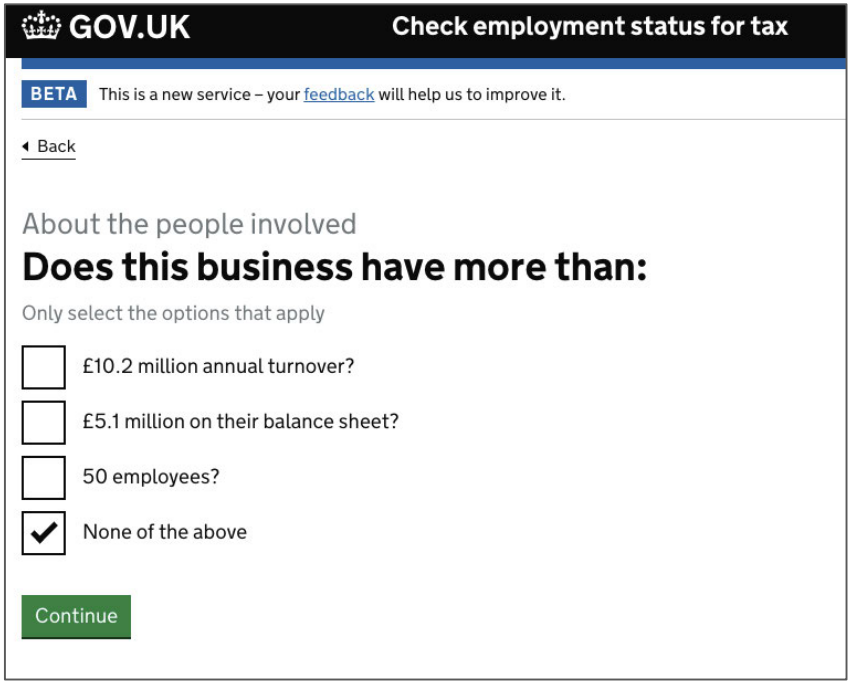
Same for worker and hirer

/live_v2/worker/sector

/live_v2/hirer/sector

Size

Same for worker and hirer



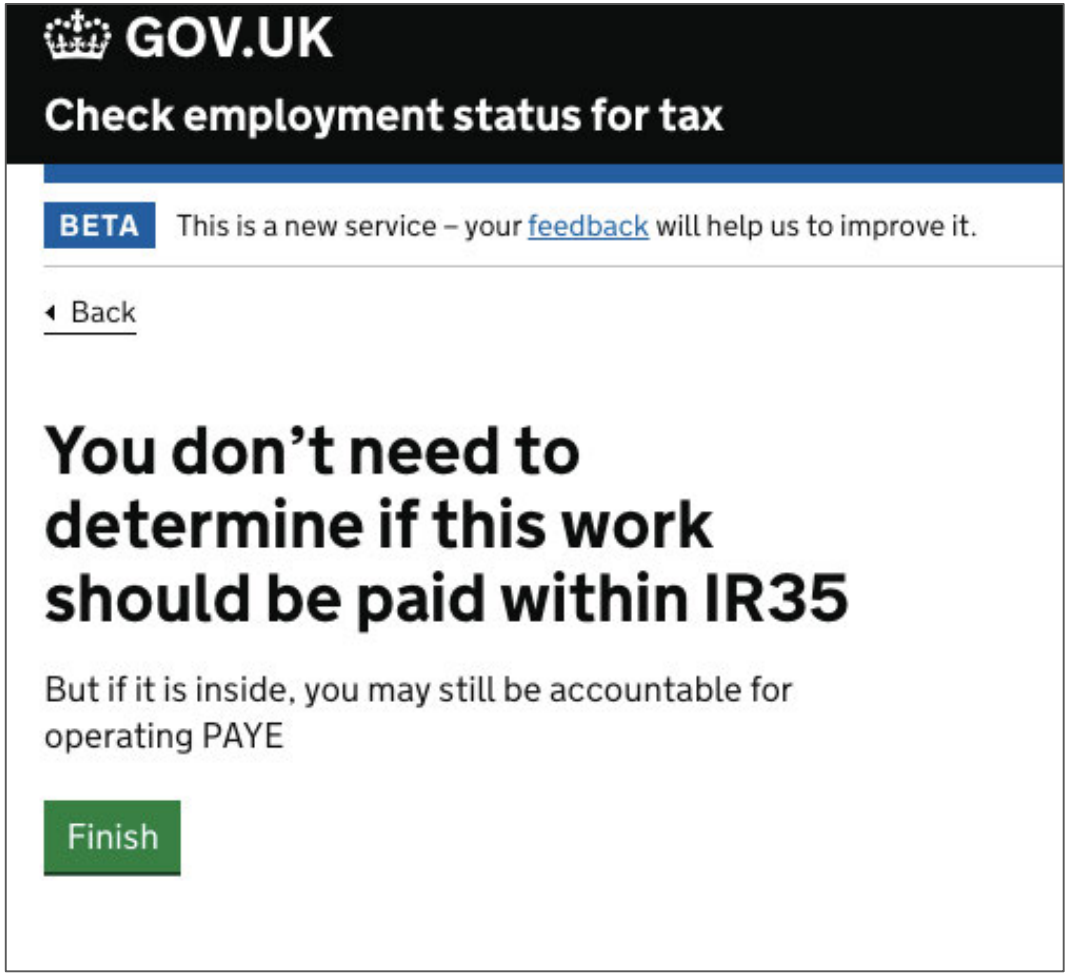
/live_v2/worker/smallBusiness

/live_v2/hirer/smallBusiness

Advisories and Exits

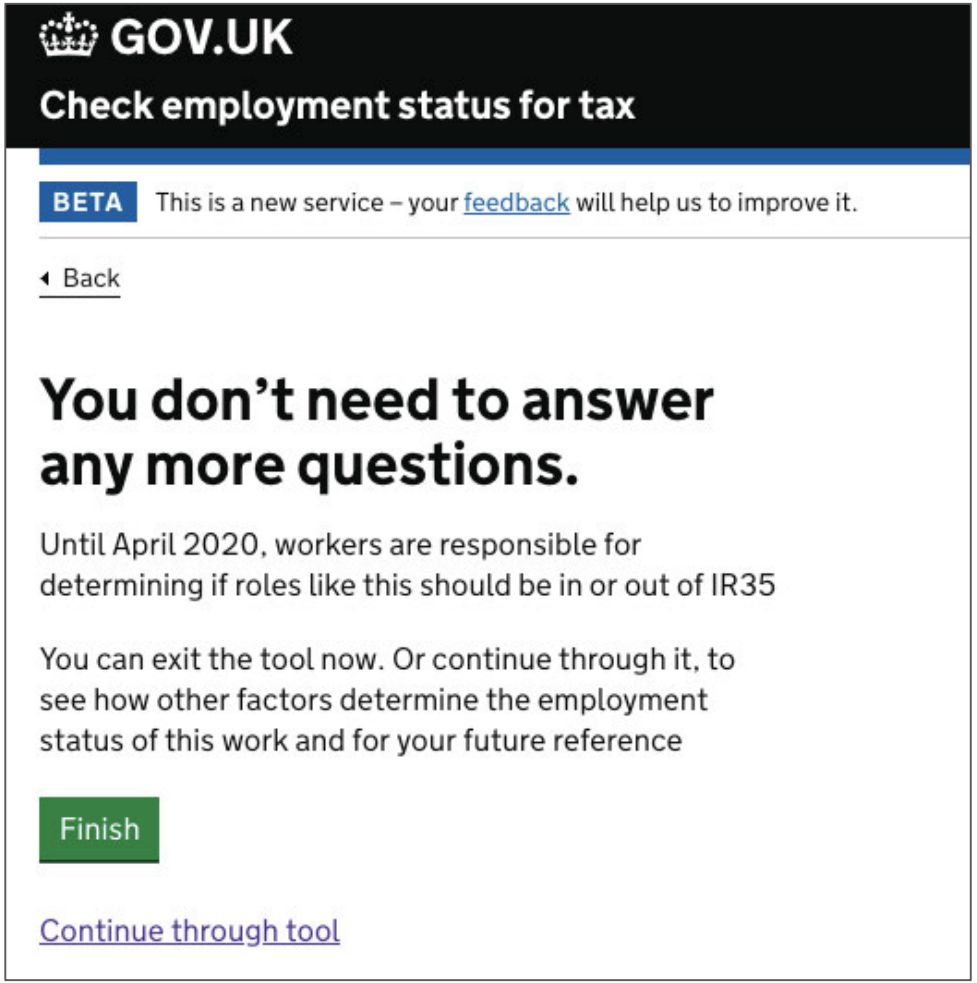
Agency Exit

Full stops in H2



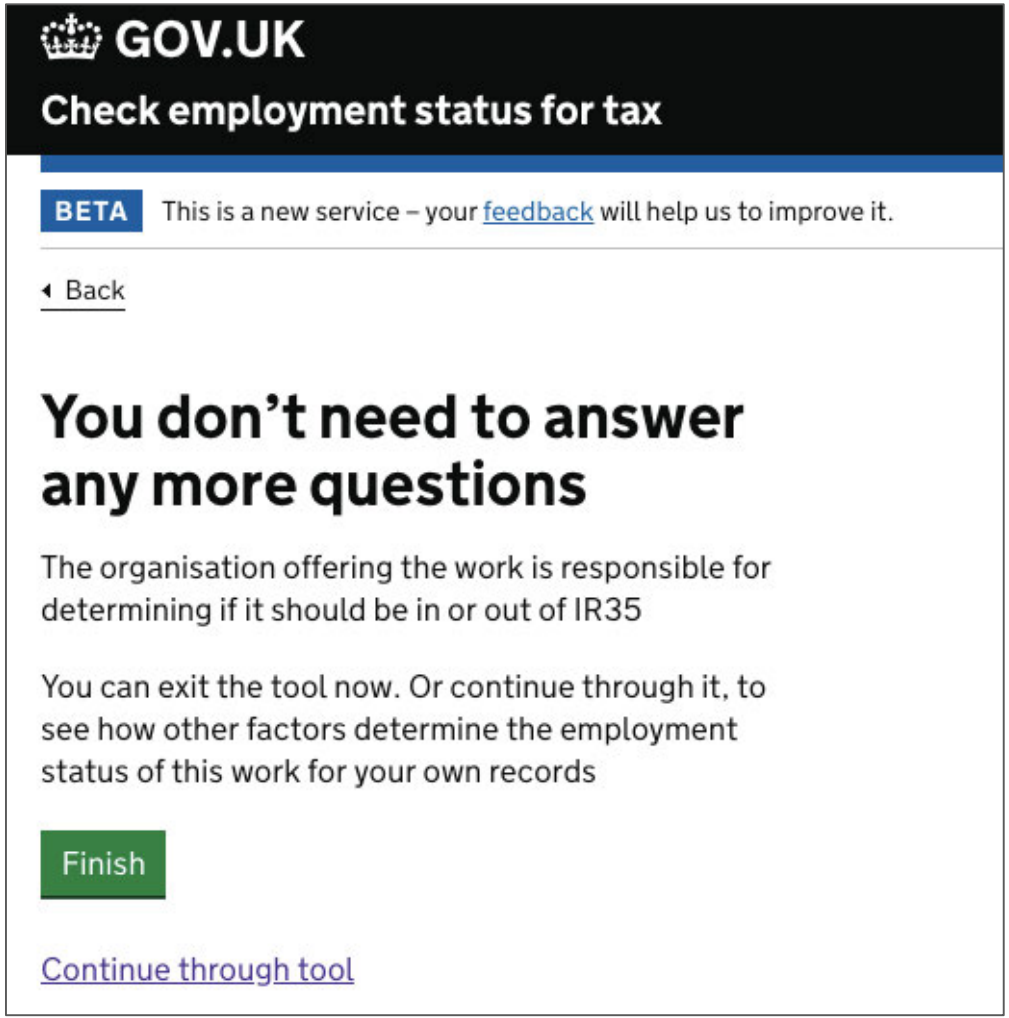
M/L Private Sector Business: Exit OR continue

FULL STOPS NEEDED IN H2



Public Sector Worker: Exit OR continue

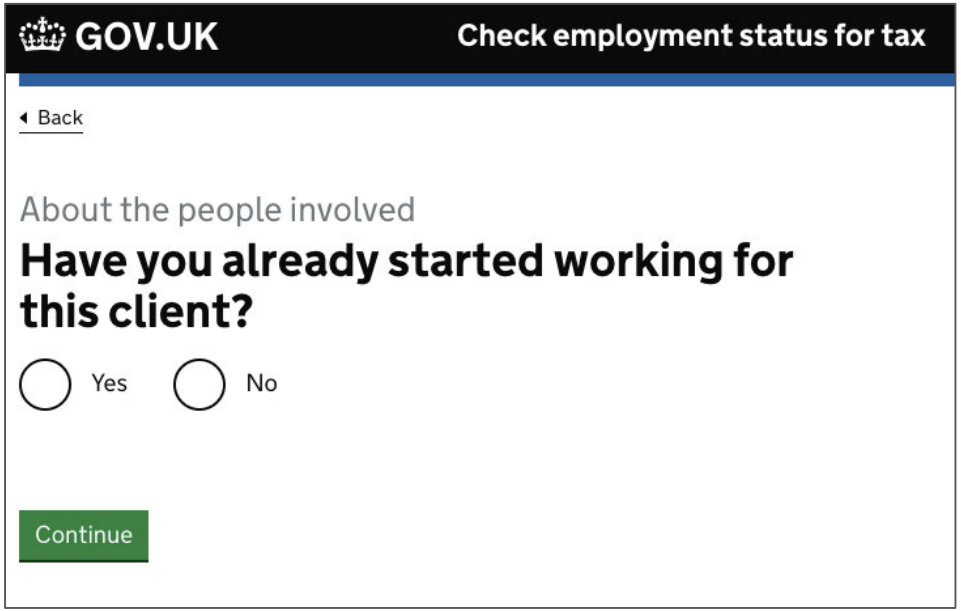
FULL STOPS NEEDED IN H2



Personal Service Section

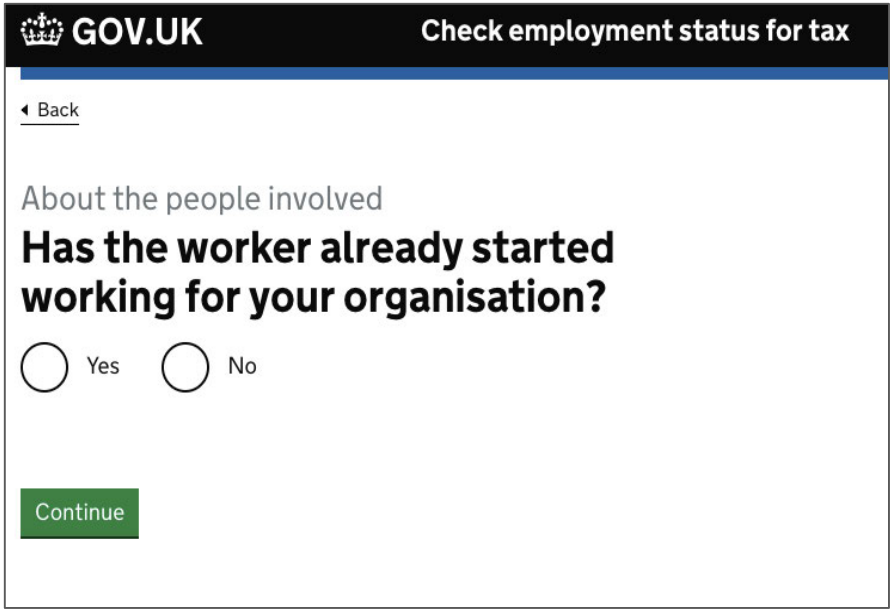
Engagement Started?

Worker



/live_v2/worker/contractStarted

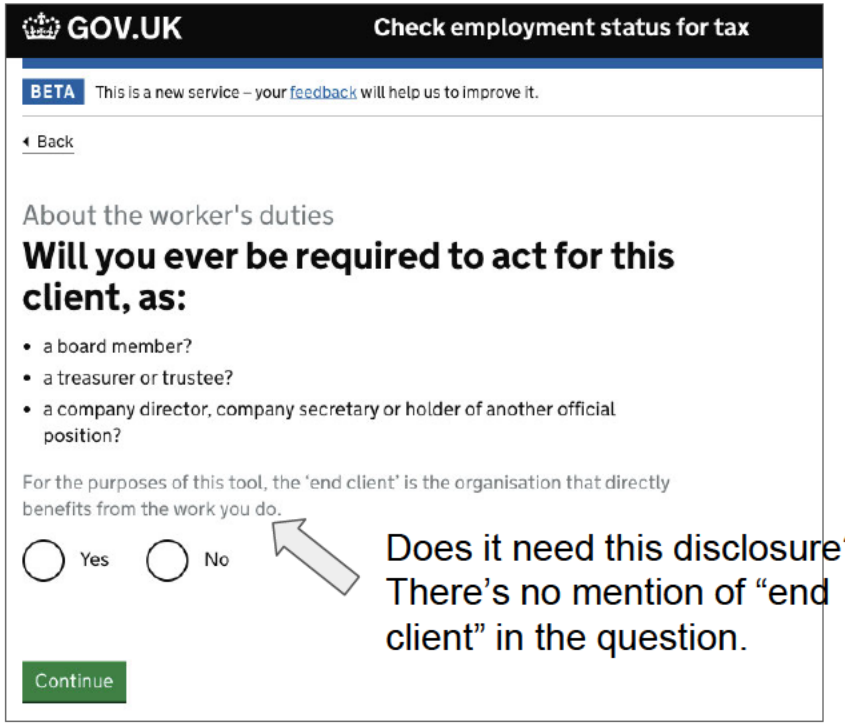
Hirer



/live_v2/hirer/contractStarted

Office Holder

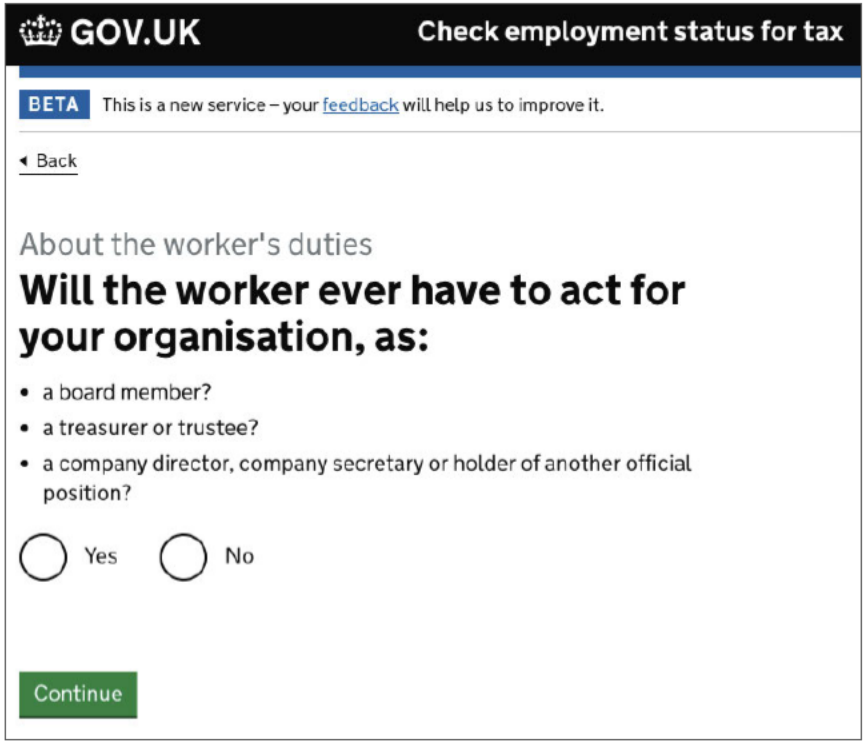
Worker



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

/live_v2/worker/officeHolder3

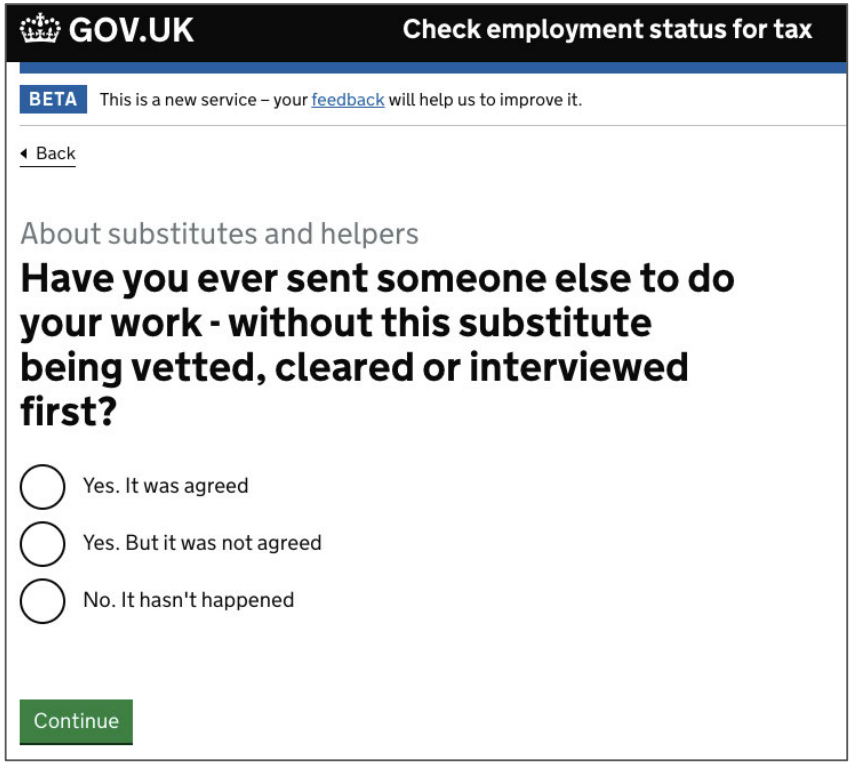
Hirer



/live_v2/hirer/officeHolder3

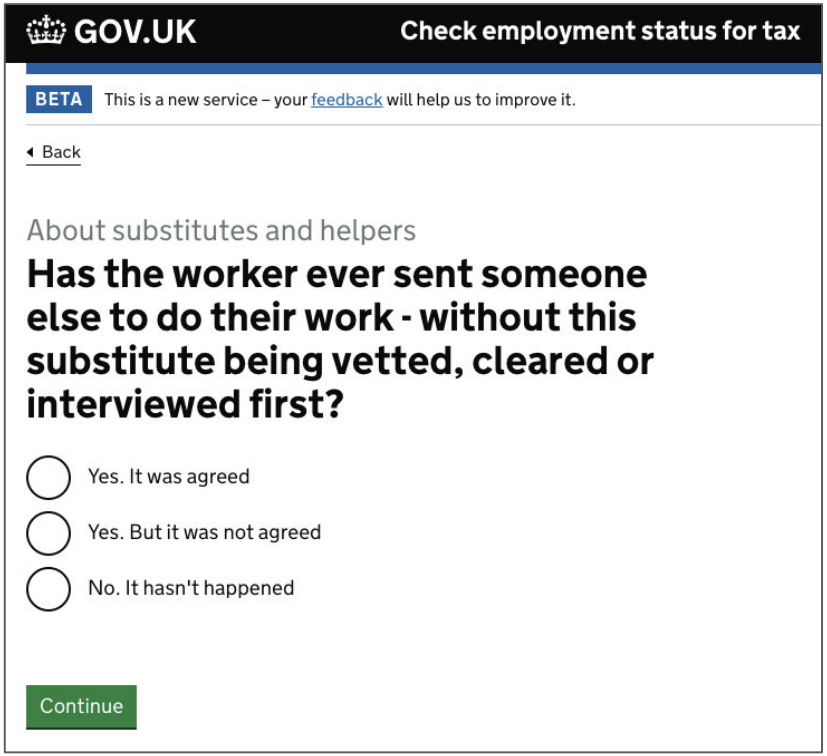
Substitute (Engagement Started)

Worker



/live_v2/worker/substitute

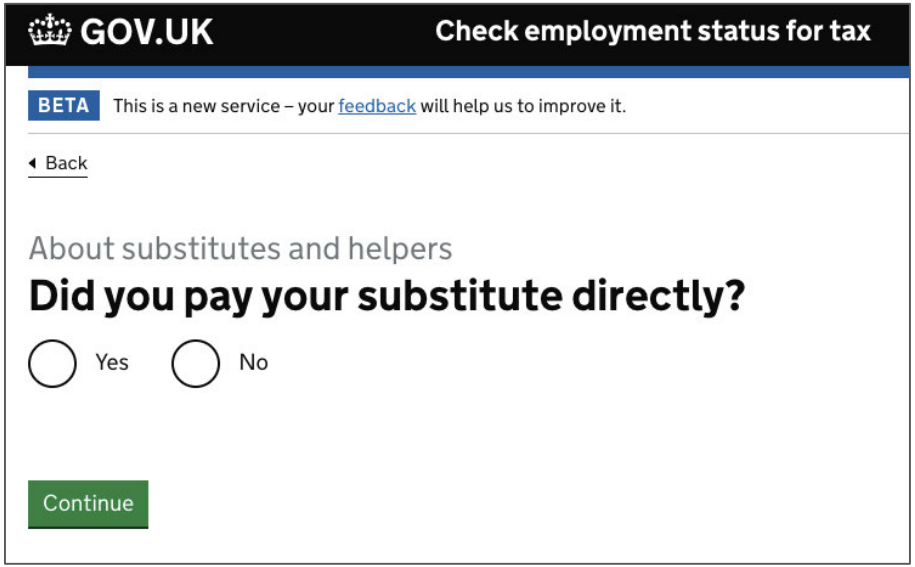
Hirer



/live_v2/hirer/substitute

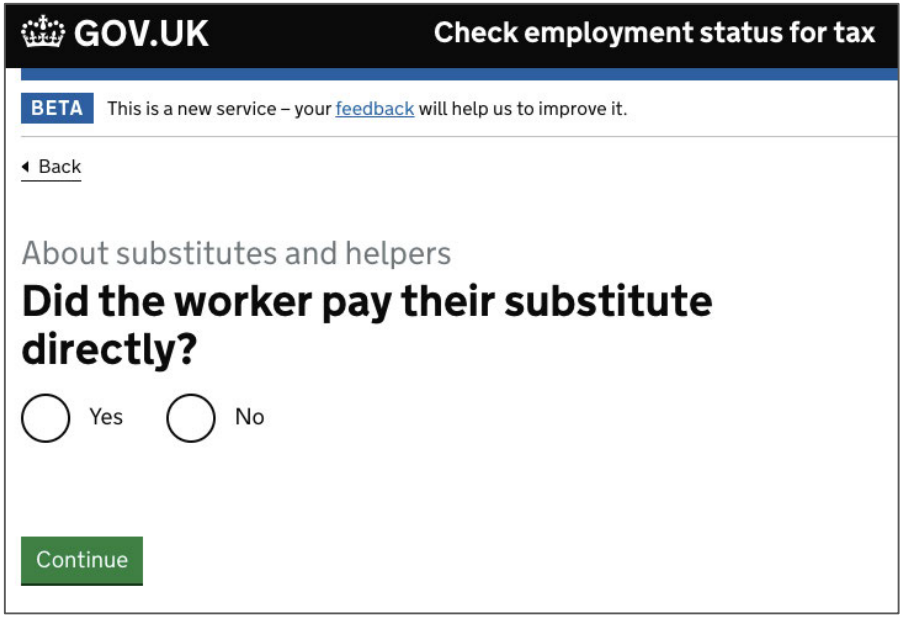
Substitute Paid? (Engagement Started)

Worker



/live_v2/worker/substitutePaid

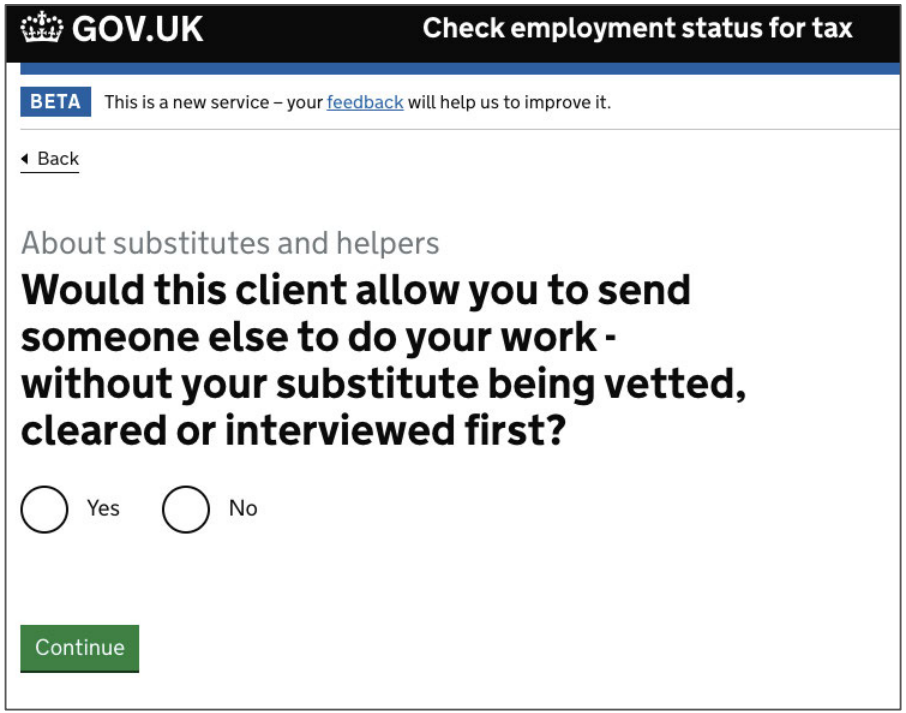
Hirer



/live_v2/hirer/substitutePaid

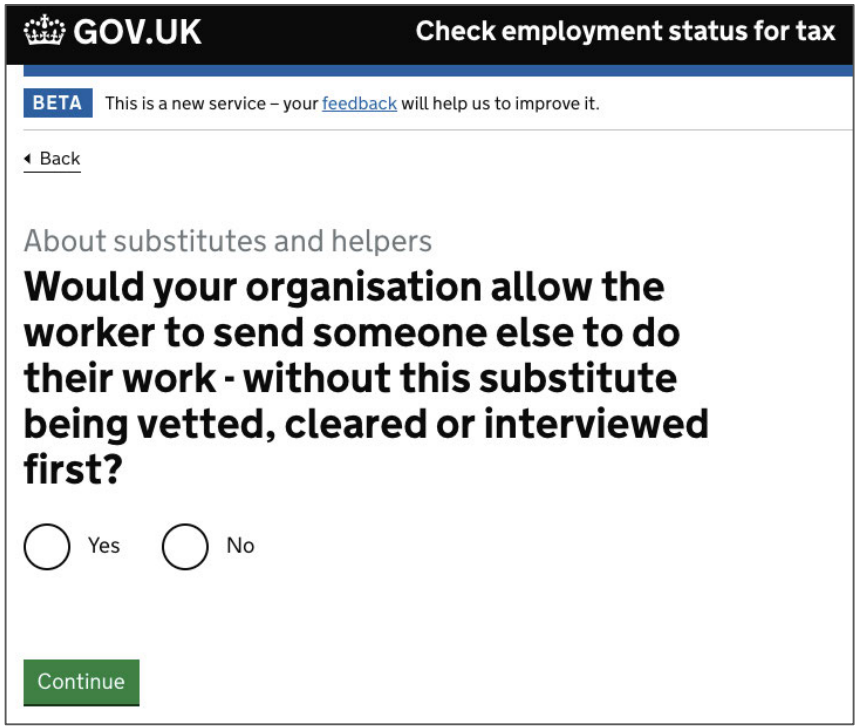
If Substitute (Engagement NOT Started)

Worker



/live_v2/worker/ifSubstitute

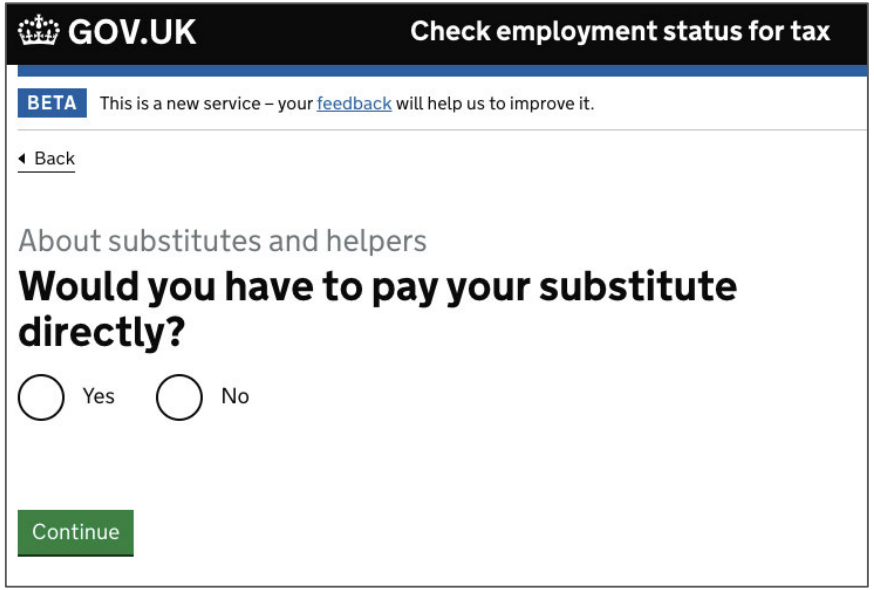
Hirer



/live_v2/hirer/ifSubstitute

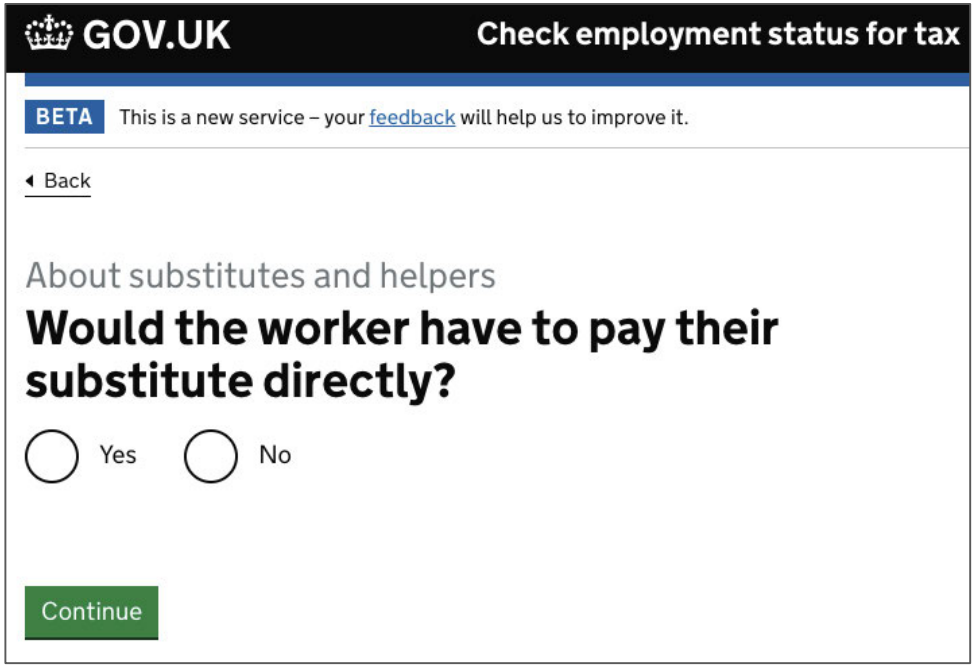
If Substitute Paid? (Engagement NOT Started)

Worker



/live_v2/worker/ifSubstitutePaid

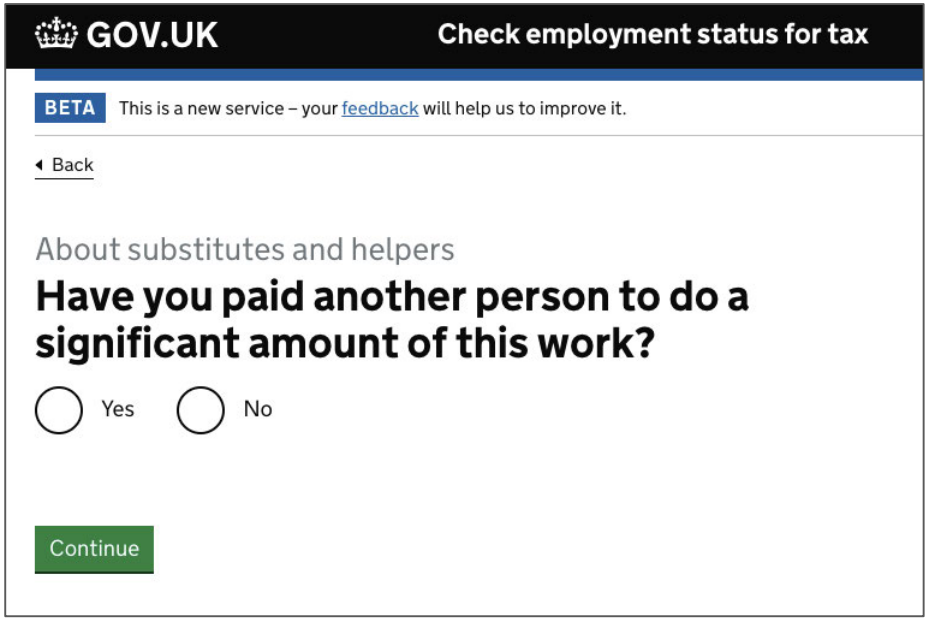
Hirer



/live_v2/hirer/ifSubstitutePaid

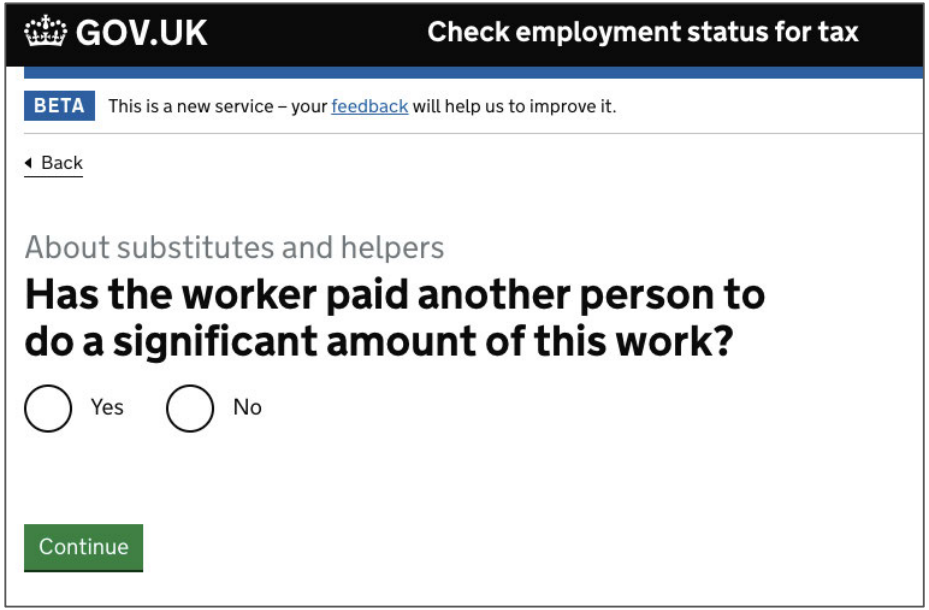
Helper

Worker



/live_v2/worker/helper

Hirer

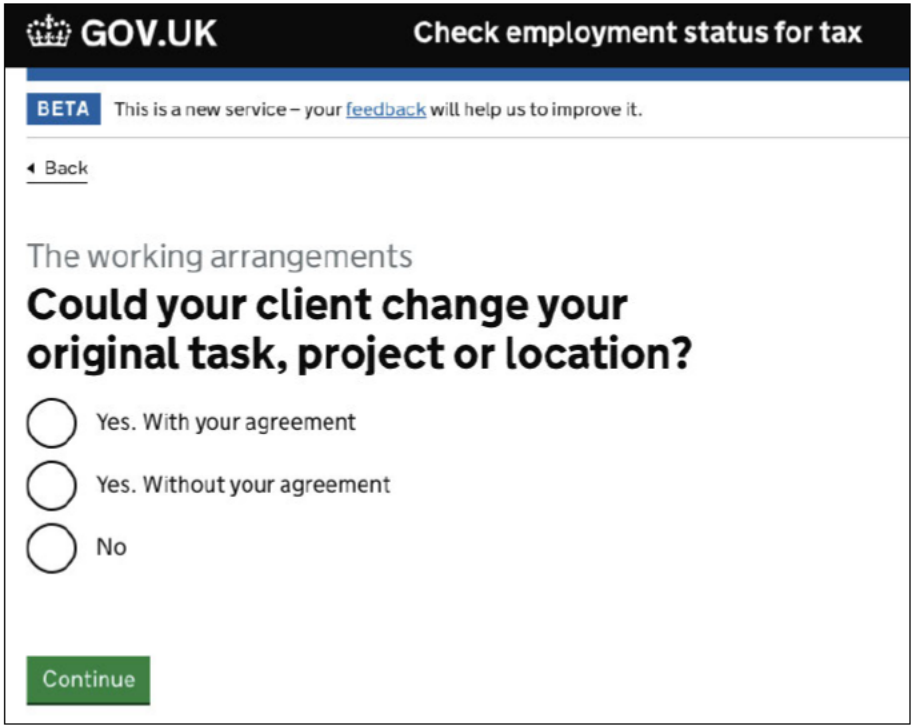


/live_v2/hirer/helper

Control Section

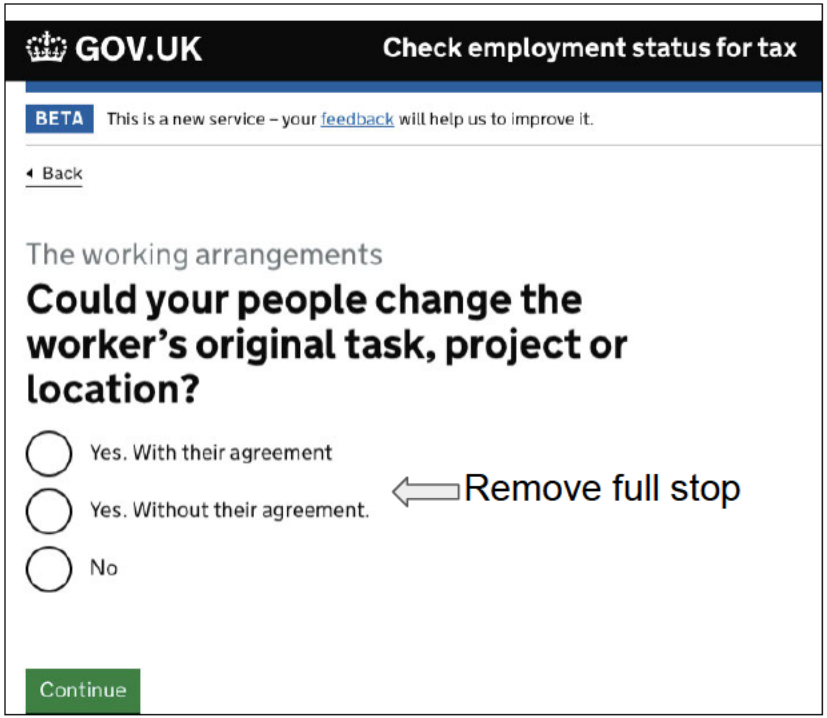
Control 1of4: Task

Worker



/live_v2/worker/controlTask

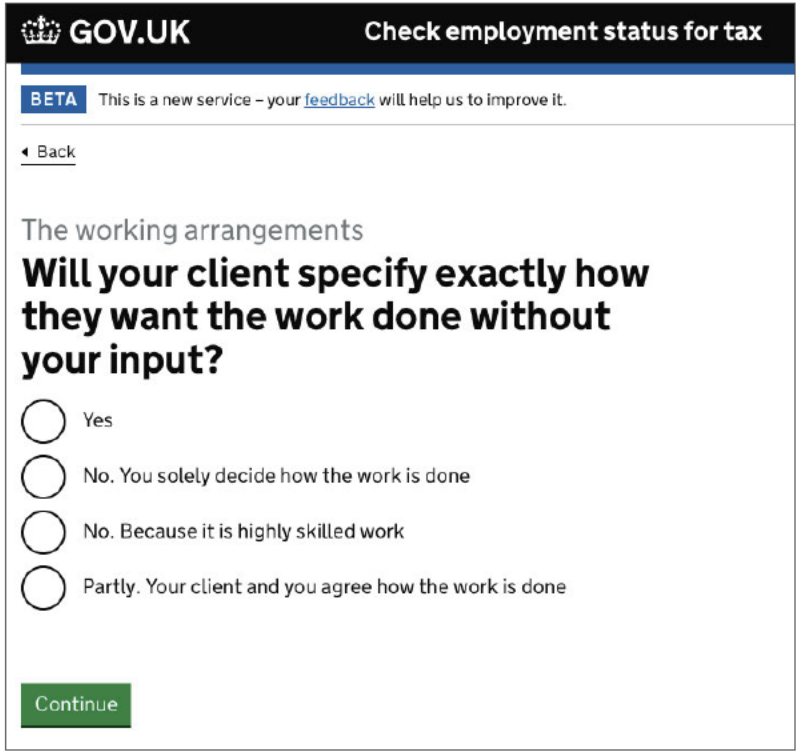
Hirer



/live_v2/hirer/controlTask

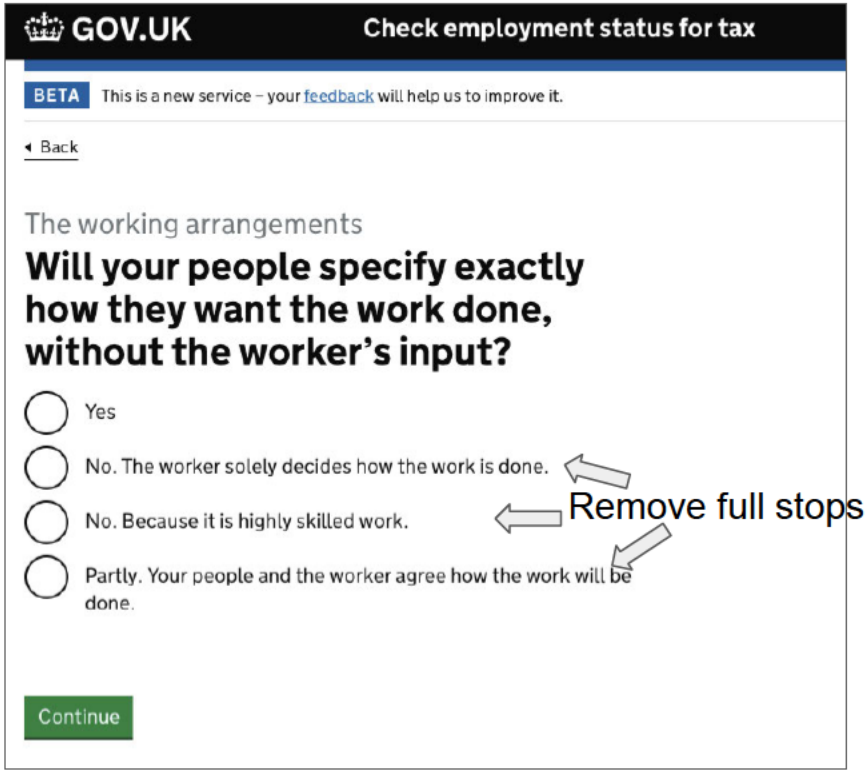
Control 2of4: How

Worker



/live_v2/worker/controlHow

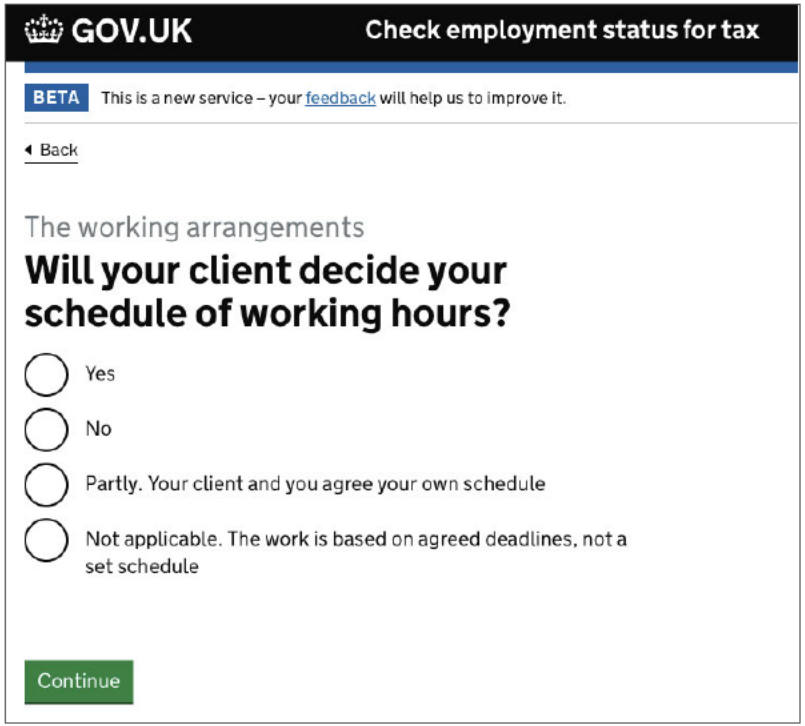
Hirer



/live_v2/hirer/controlHow

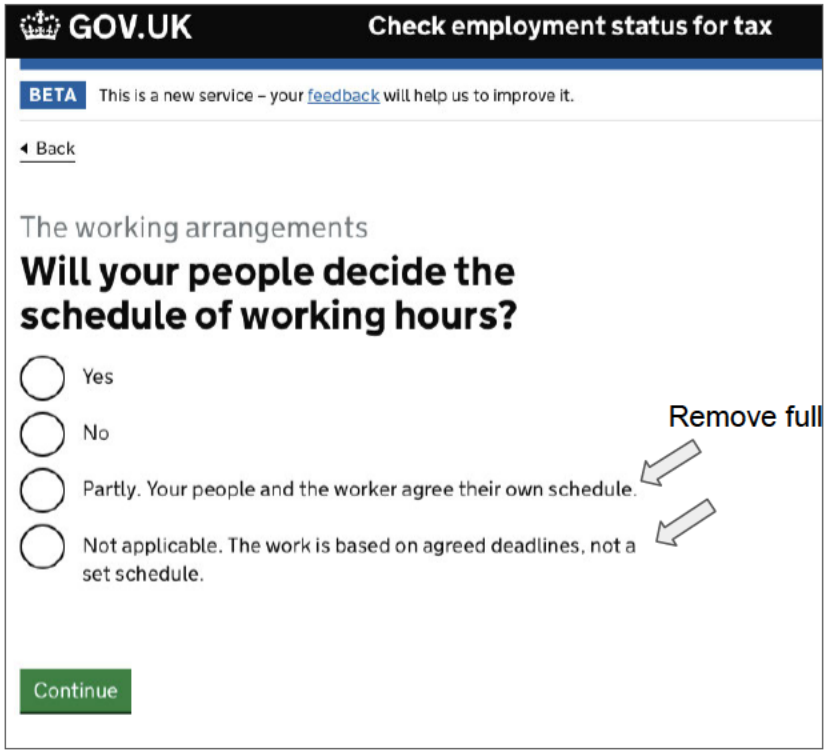
Control 3of4: When

Worker



/live_v2/worker/controlWhen

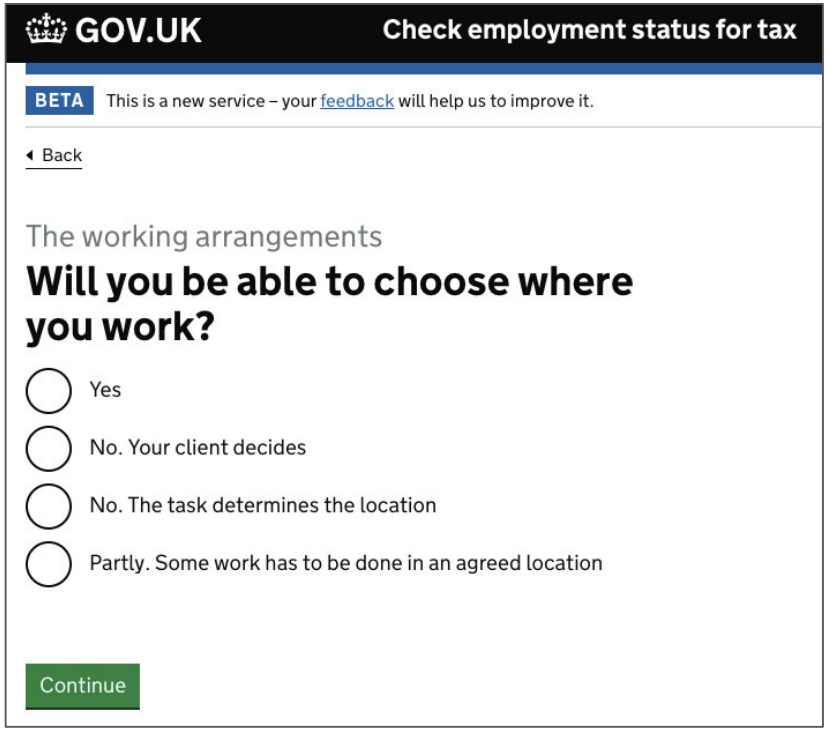
Hirer



/live_v2/hirer/controlWhen

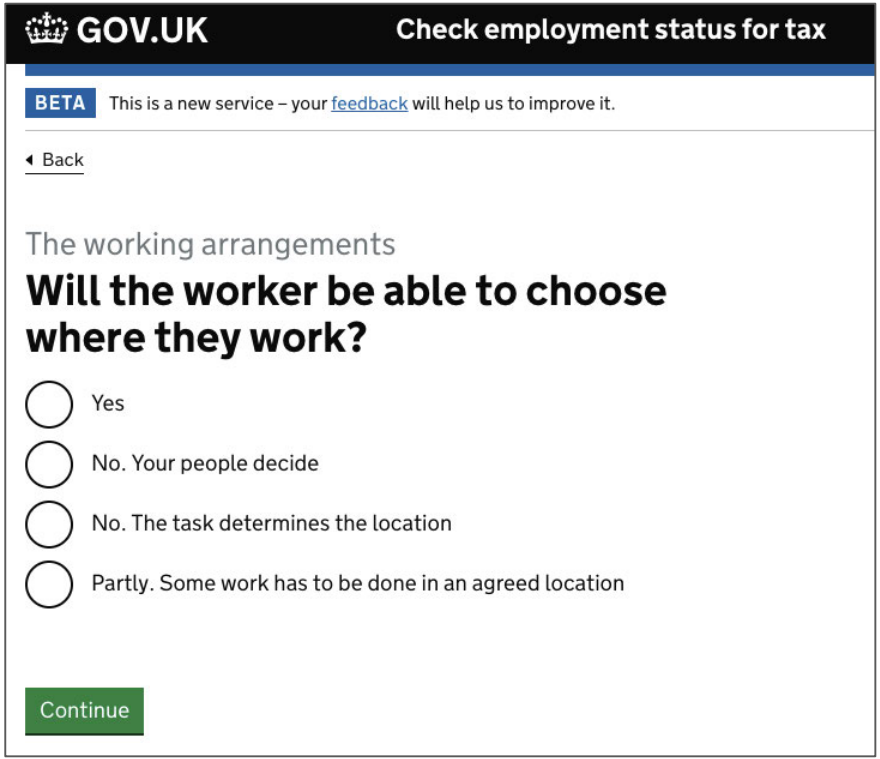
Control 4of4: Where

Worker



/live_v2/worker/controlWhere

Hirer

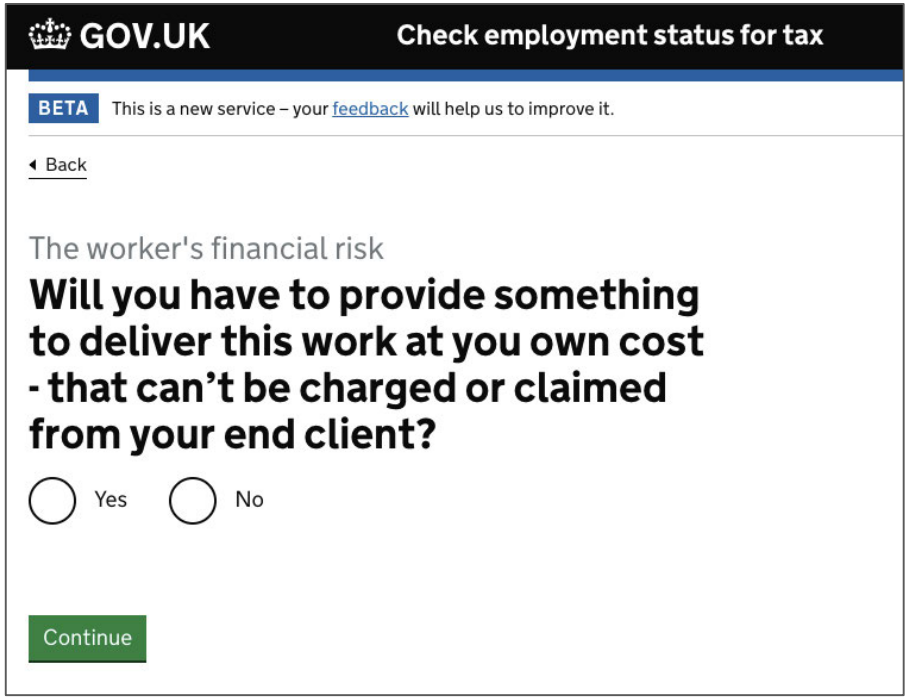


/live_v2/hirer/controlWhere

Financial Risk Section

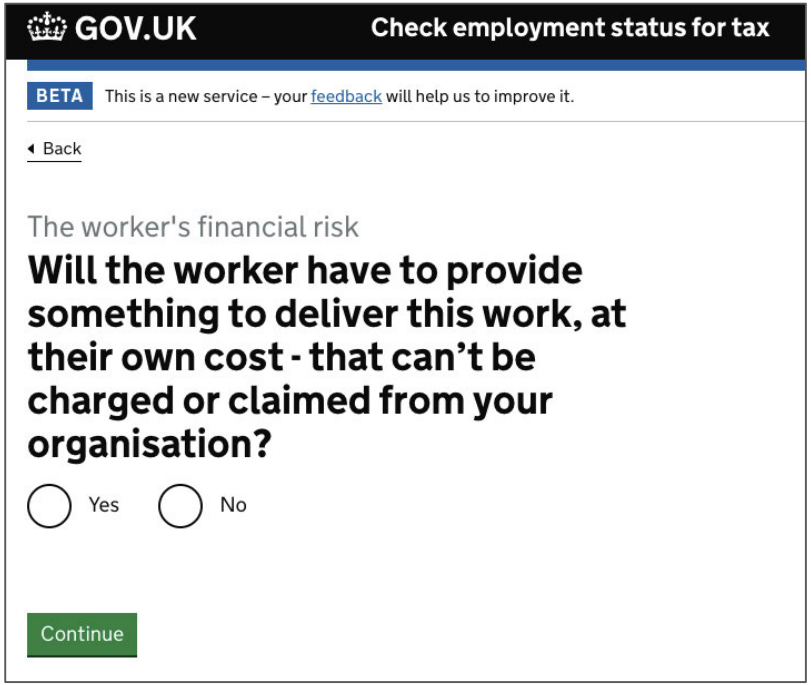
Financial Risk 1of4: Any Expenses?

Worker



/live_v2/worker/expenses

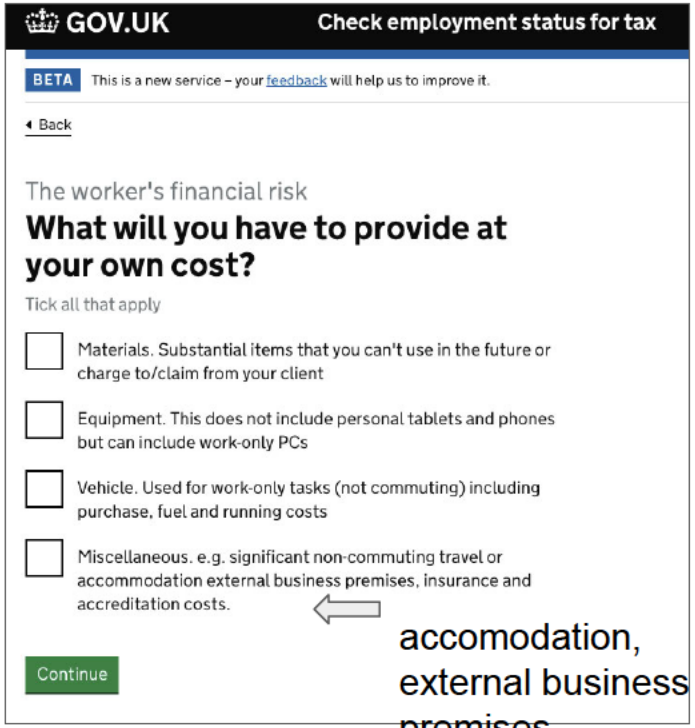
Hirer



/live_v2/hirer/expenses

Financial Risk 2of4: Expense Type

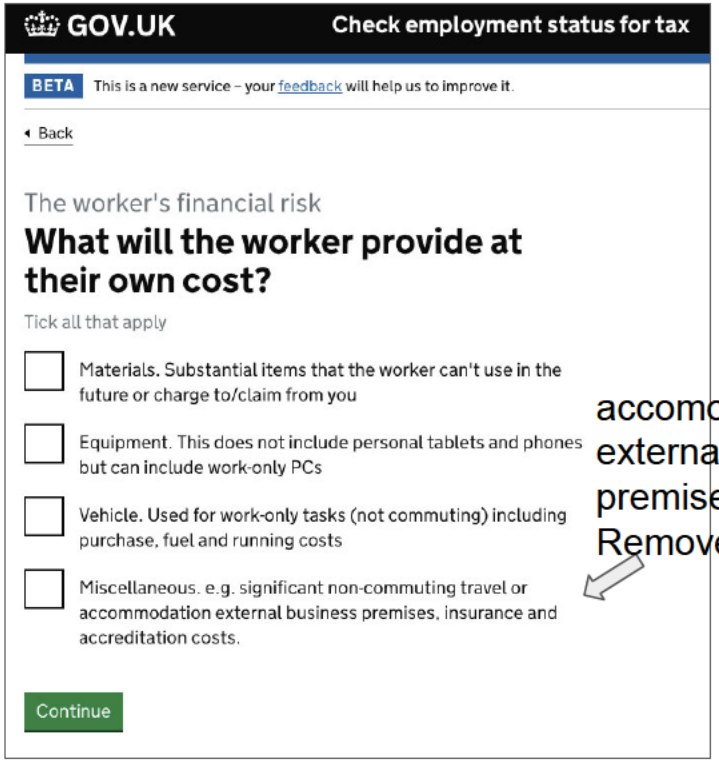
Worker



accomodation, external business premises
Remove full stop

/live_v2/worker/expenses2

Hirer

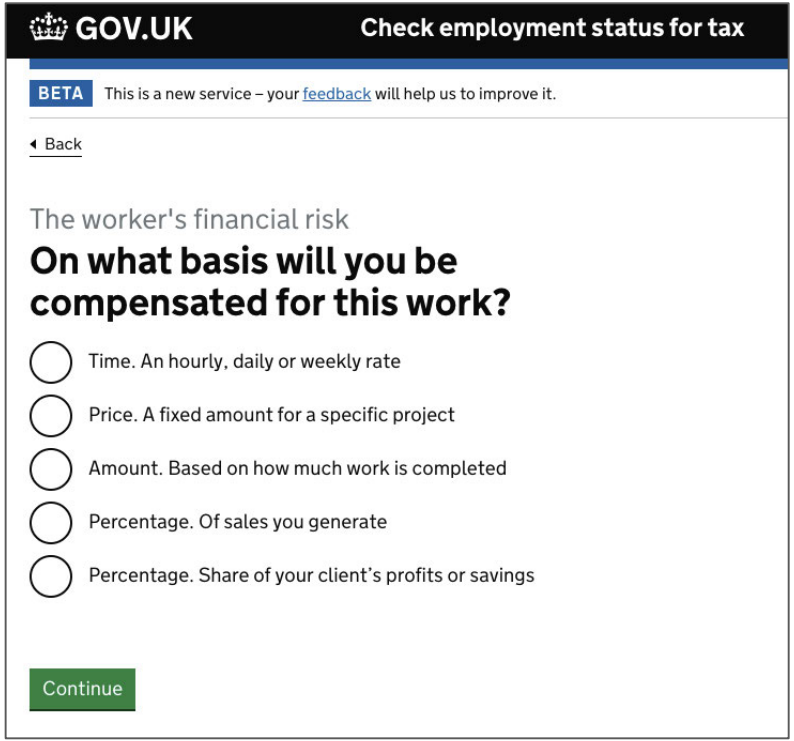


accomodation, external business premises
Remove full stop

/live_v2/hirer/expenses2

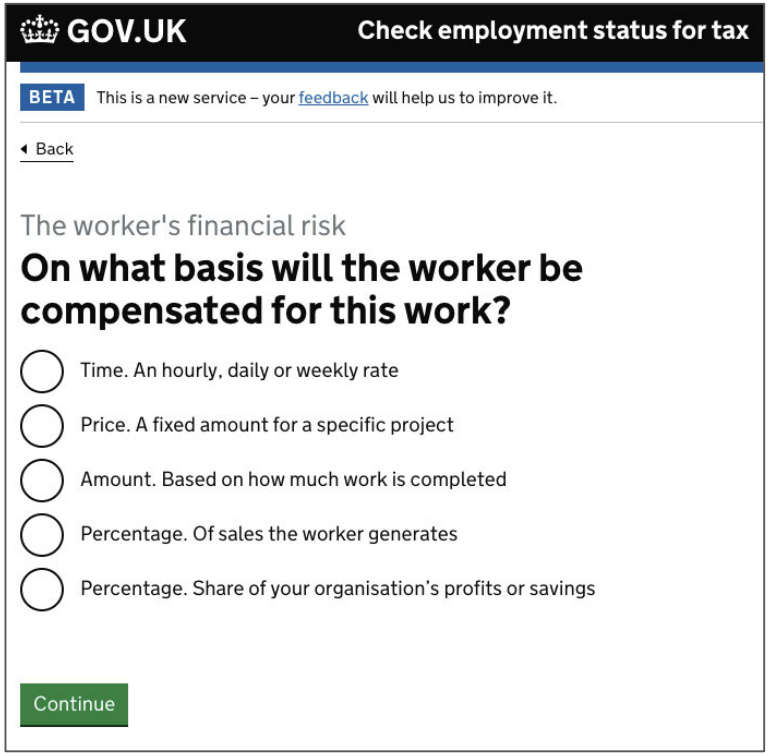
Financial Risk 3of4: Pay

Worker



/live_v2/worker/pay

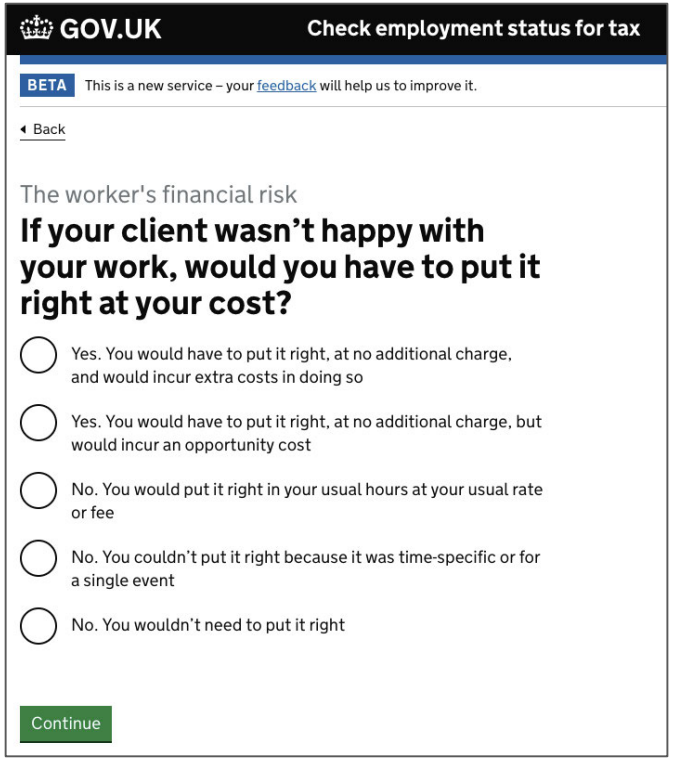
Hirer



/live_v2/hirer/pay

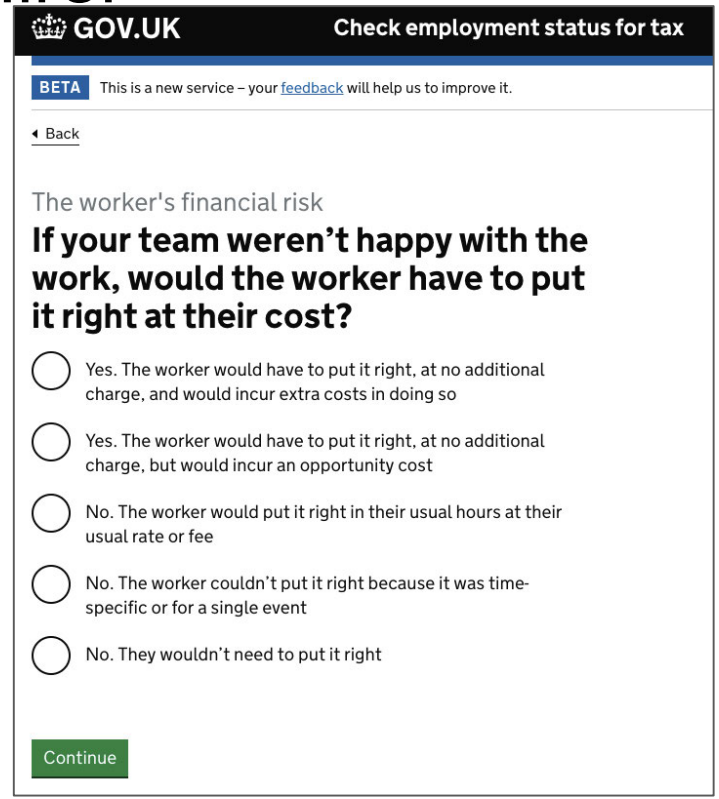
Financial Risk 4of4: Dispute

Worker



/live_v2/worker/dispute

Hirer

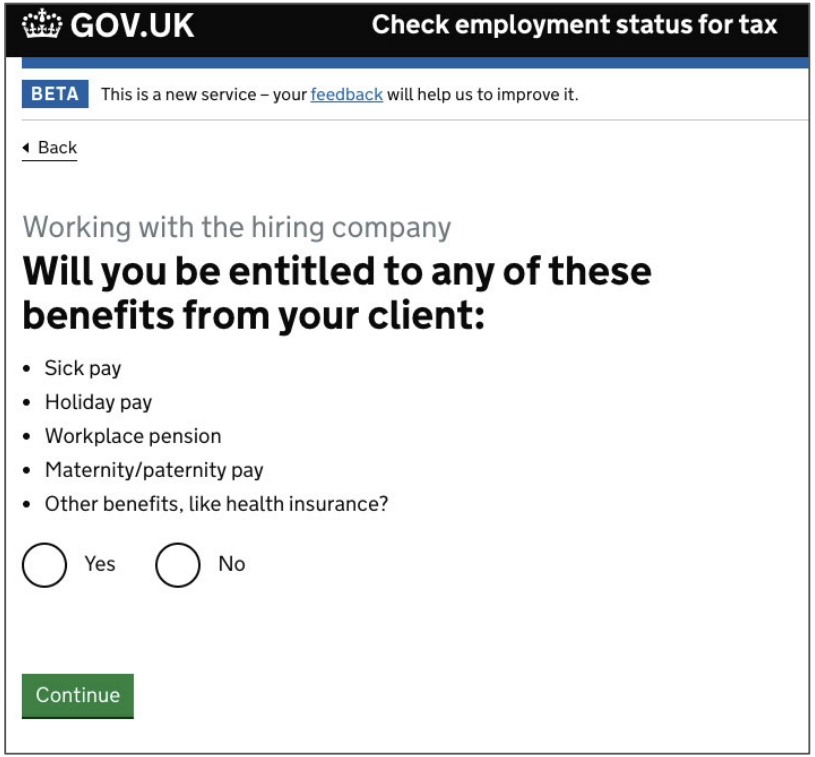


/live_v2/hirer/dispute

Part & Parcel Section

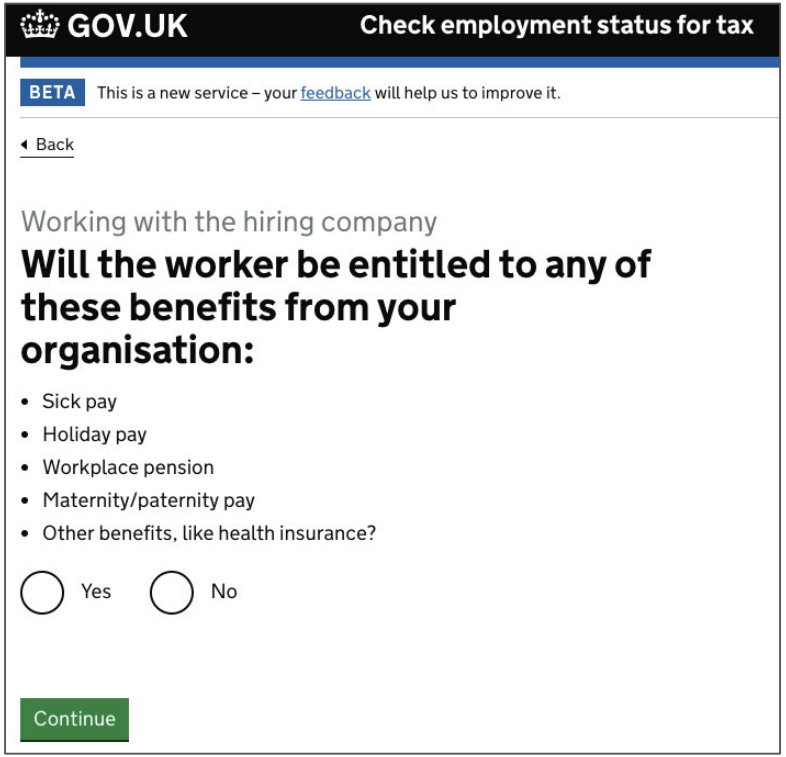
Part & Parcel 1of4: Benefits

Worker



/live_v2/worker/benefits

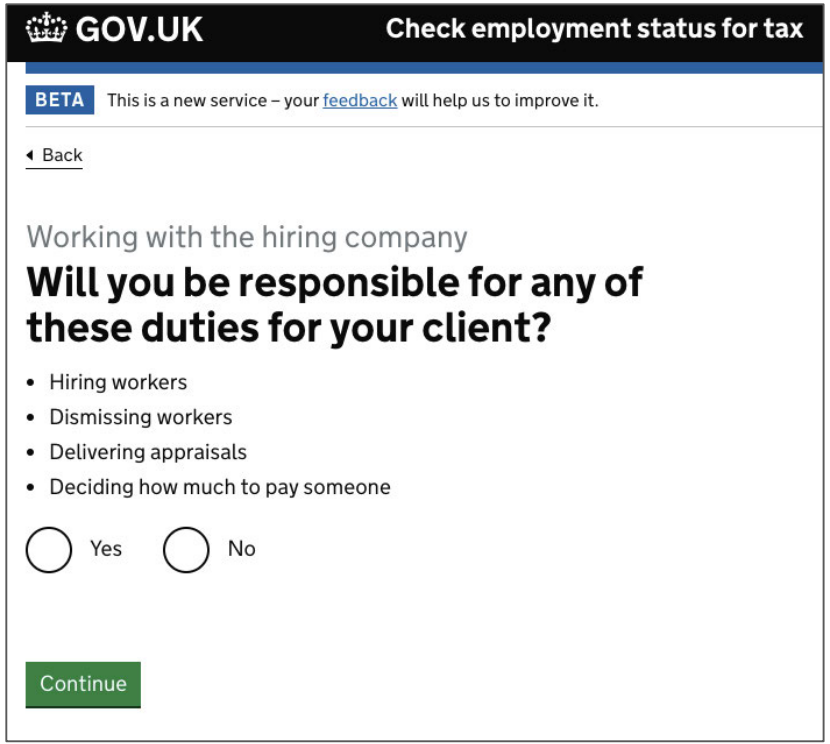
Hirer



/live_v2/hirer/benefits

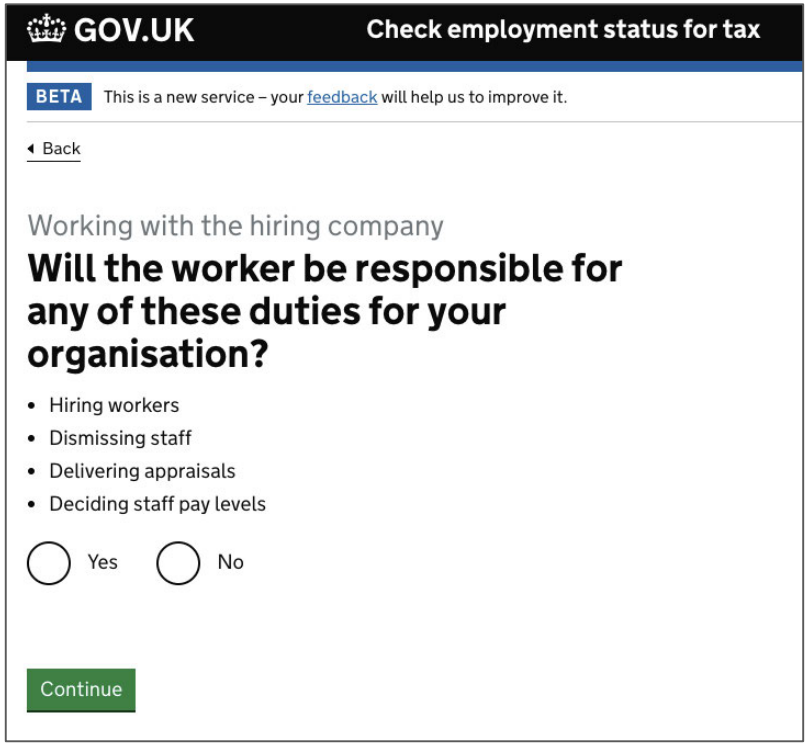
Part & Parcel 2of4: Duties

Worker



/live_v2/worker/duties

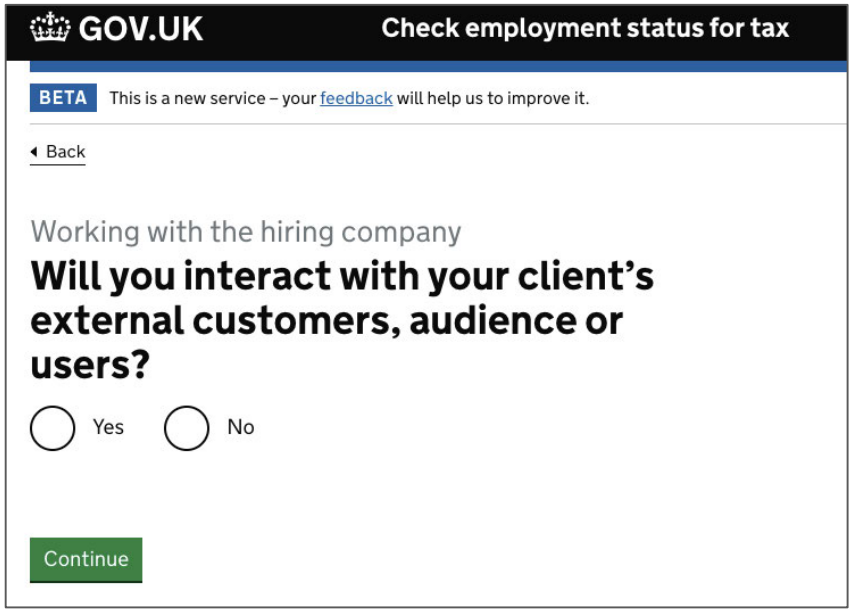
Hirer



/live_v2/hirer/duties

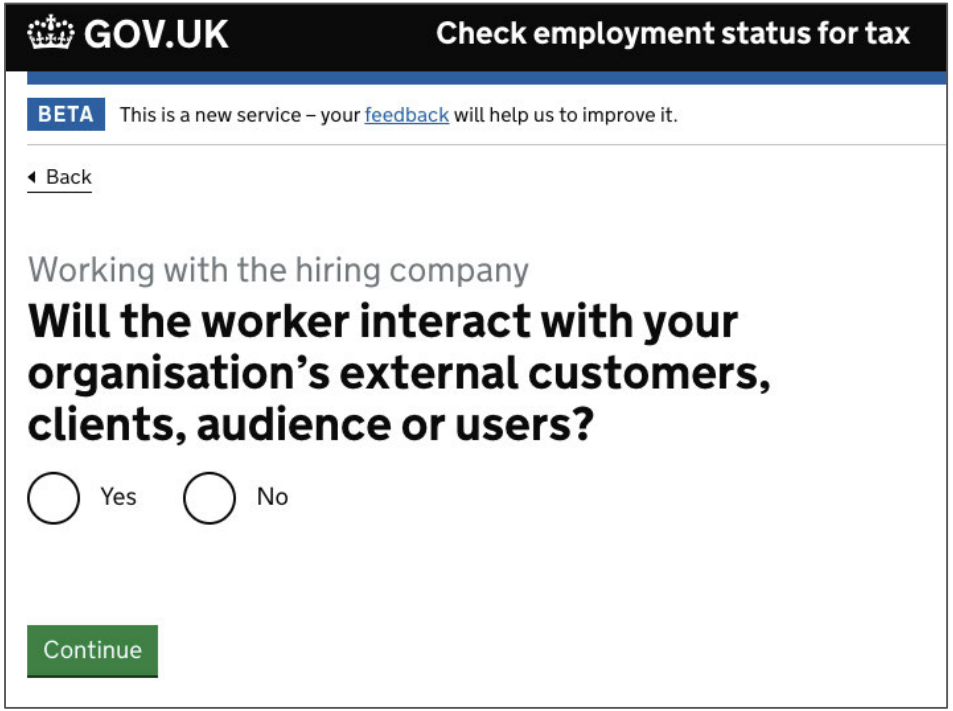
Part & Parcel 3of4: Interaction

Worker



/live_v2/worker/interaction

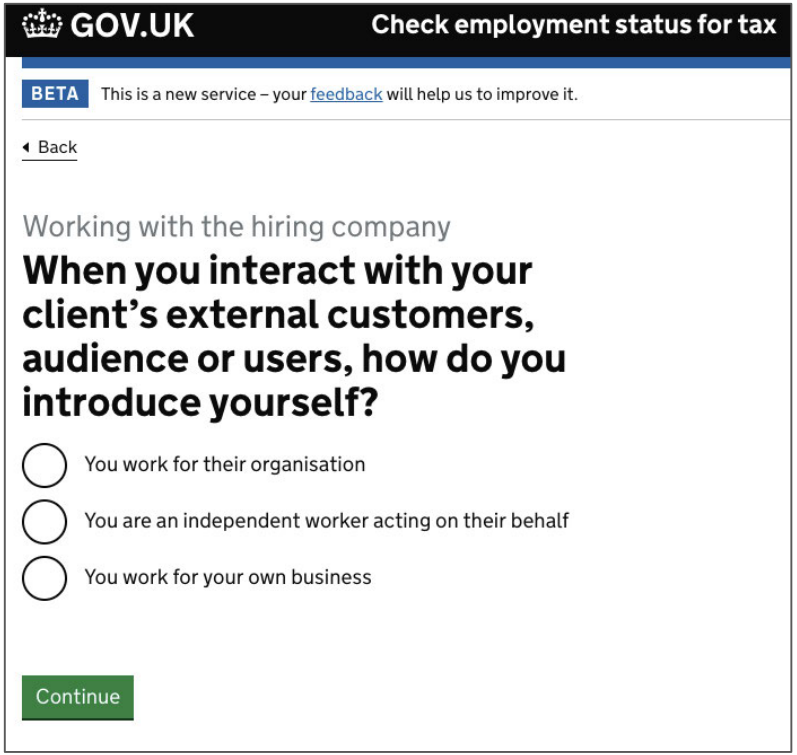
Hirer



/live_v2/hirer/interaction

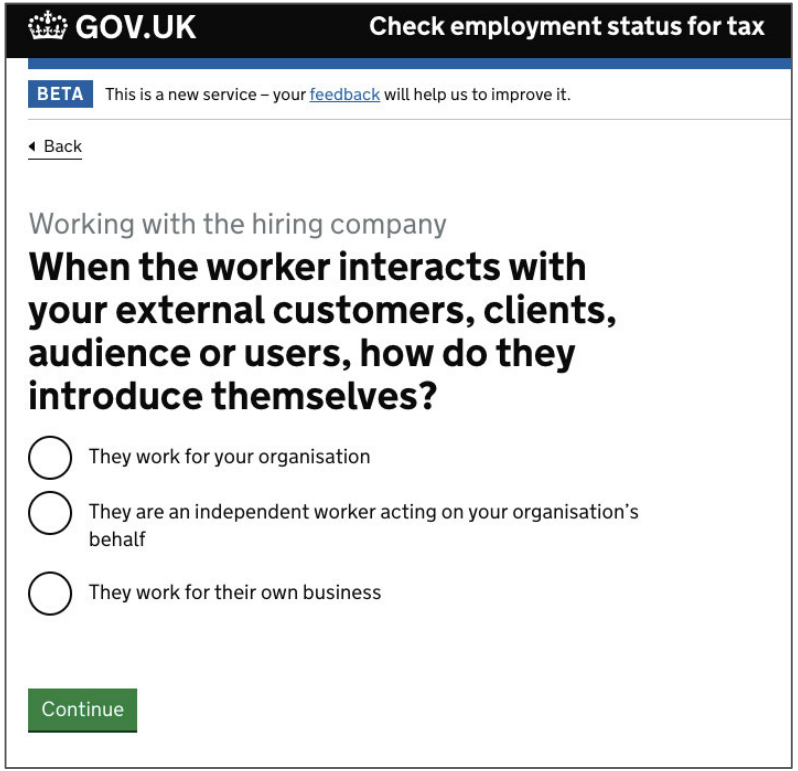
Part & Parcel 4of4: Identity

Worker



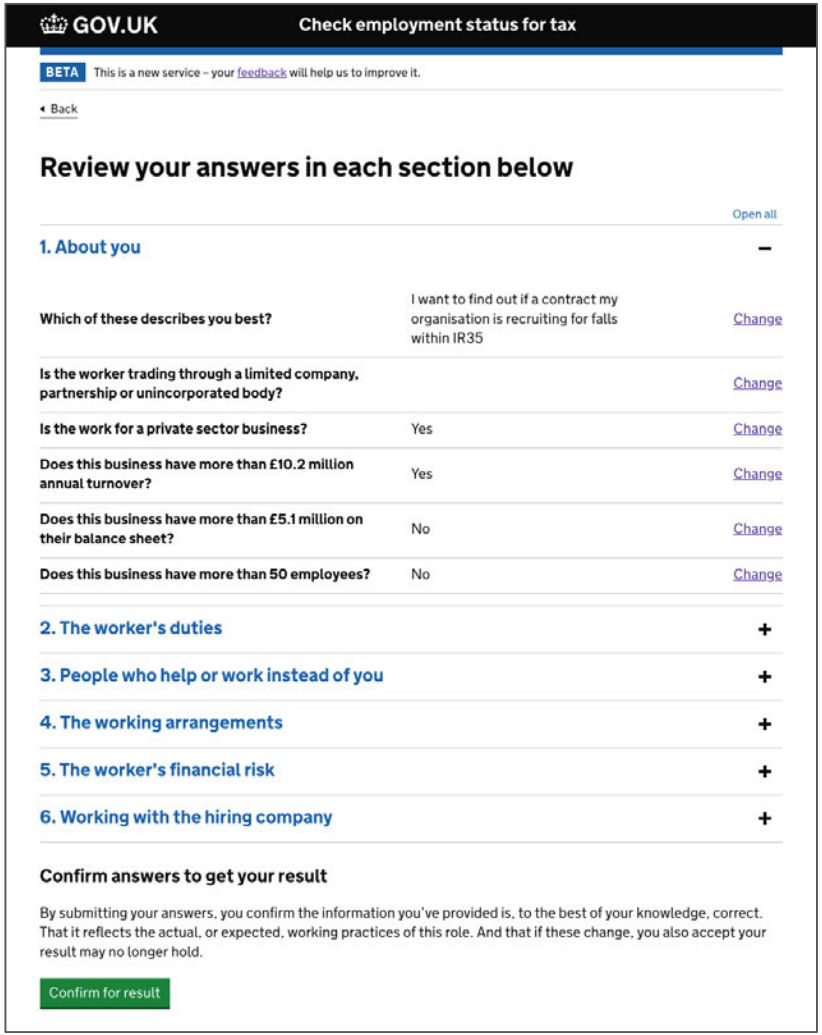
/live_v2/worker/identity

Hirer



/live_v2/hirer/identity

Check answers



GOV.UK Check employment status for tax

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.

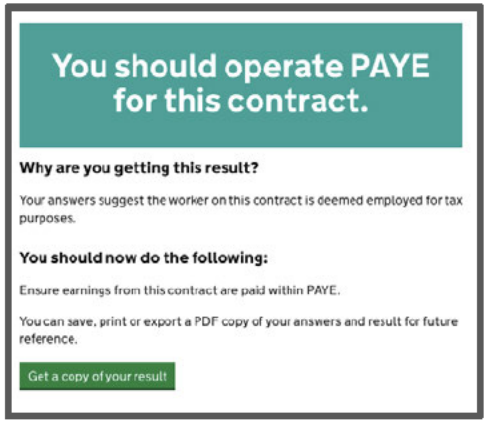
Confirm for result

Result (Inside)

PAYE determination (No Intermediary)

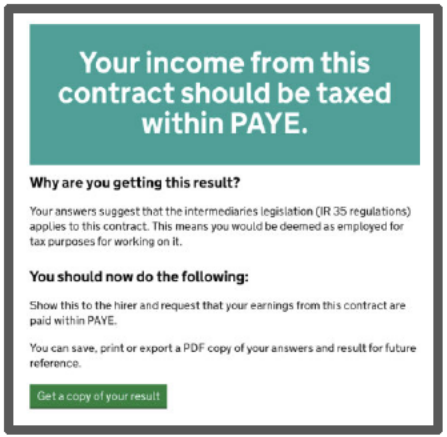
WORKER

HIRER

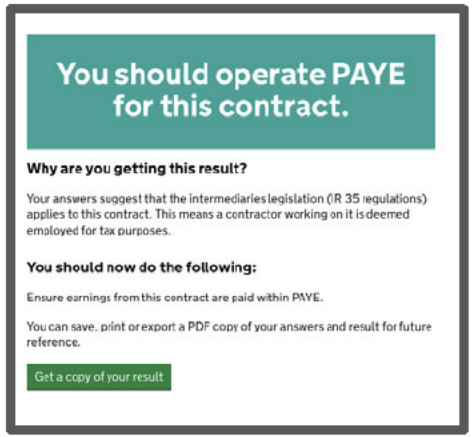


IR35 determination (Intermediaries Legislation)

WORKER



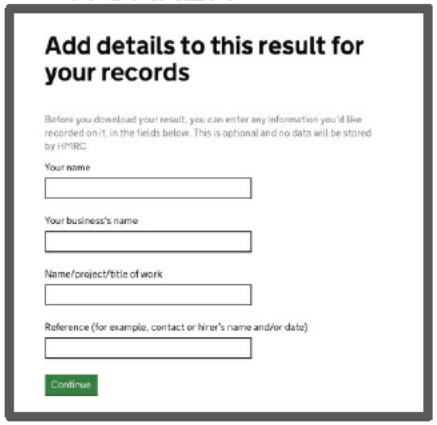
HIRER



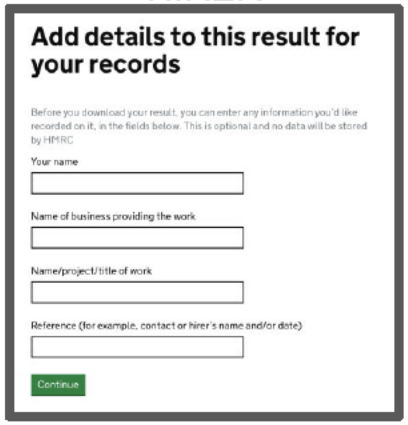
Customise Result

PAYE determination (No Intermediary)

WORKER

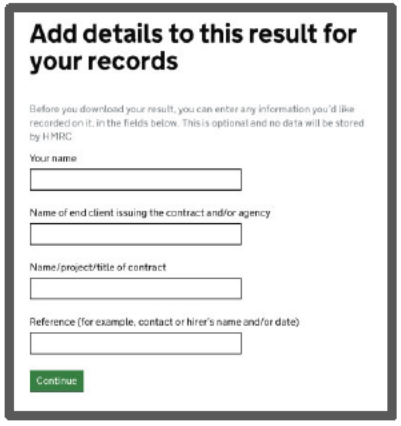


HIRER

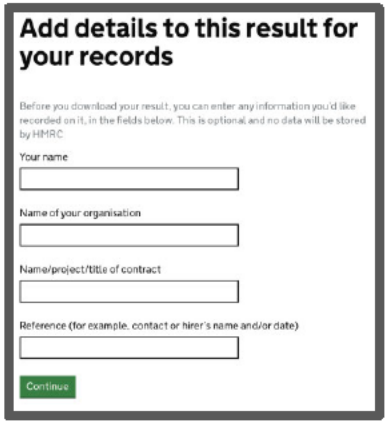


IR35 determination (Intermediaries Legislation)

WORKER



HIRER



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 - 06/03/1	07/03/19 - 20/03/1	21/03/19 - 03/04/1	04/04/19 - 17/04/1	18/04/19 - 01/05/1	02/05/19 - 15/05/1	16/05/19 - 29/05/1	30/05/19 - 12/06/1	13/06/19 - 26/06/1	27/06/19 - 10/07/1
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, Accesibility & 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 Accesibility Testing)

Updates made: Development Lane & Assurance Events

Thank you

Risk and Issues

[redacted]

Number	Description	Mitigation	Owner	Status
1	Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act. There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.	1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard 2 - Store data in an easily accessible format 3 - Be as transparent as possible e.g. UAT in GitHub	[redacted]	Closed
2	Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance	**Escalated to project risk register (Risk and Issues bi-weekly call)** 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.	[redacted]	Closed
3	Deskpro secure email is currently unsupported on a day to day basis	**Escalated to project risk register (Risk and Issues bi-weekly call)** Customer Service Group have agreed to support the deskpro service.	[redacted]	Closed
4	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. **See Assumption No. 2**	**Escalated to project risk register (Risk and Issues bi-weekly call)**	[redacted]	Closed
5	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.	This is mitigated by using a common style guide and [redacted] kindly offered to talk if we had any major concerns. Content designer allocated. We have access to Gov.uk content via Sharepoint. **Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)**	[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 e.g. lack of personalised tone You and Your And Them
- Complete refactoring

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

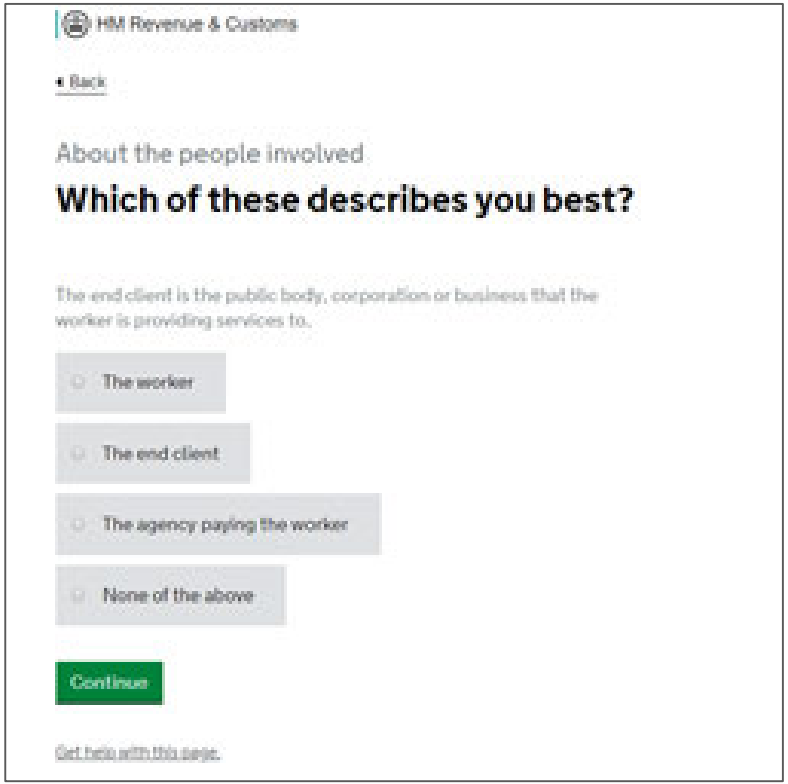
- Task driven entry points
- Tailored results page
- New content throughout

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)



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:

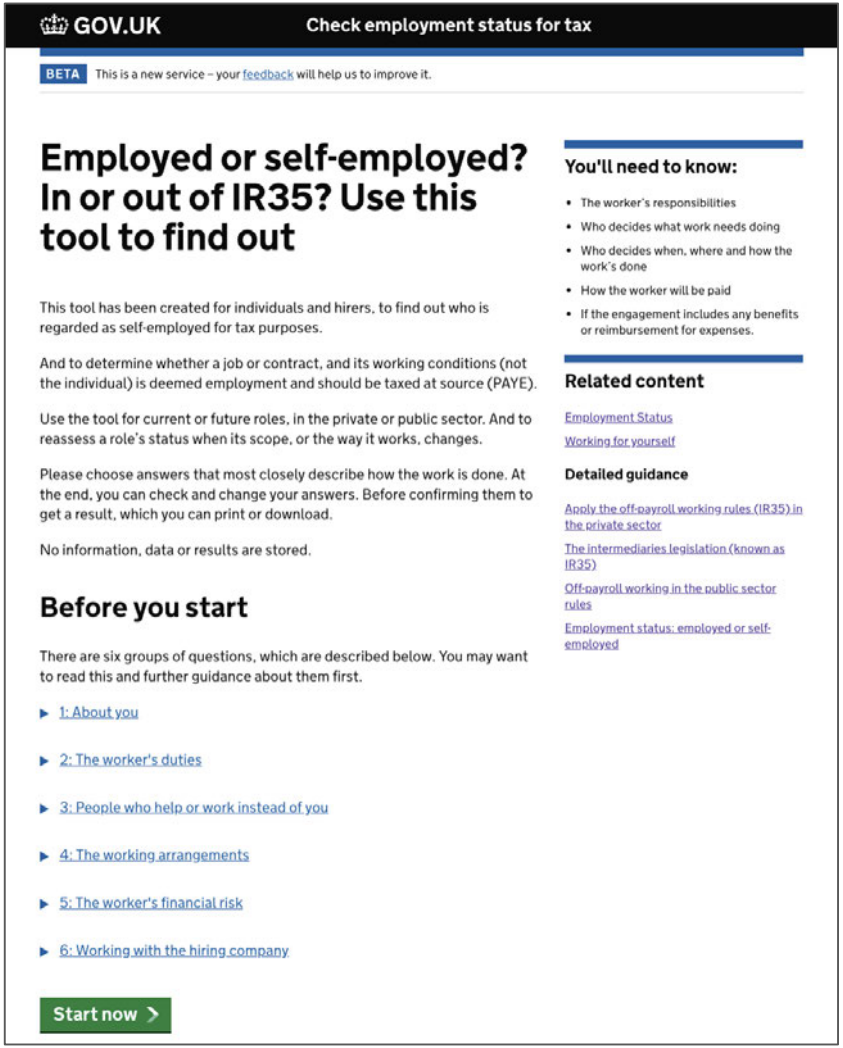
We intend to use the decision made by the user on this page to allow tailored content to be displayed.

- 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.

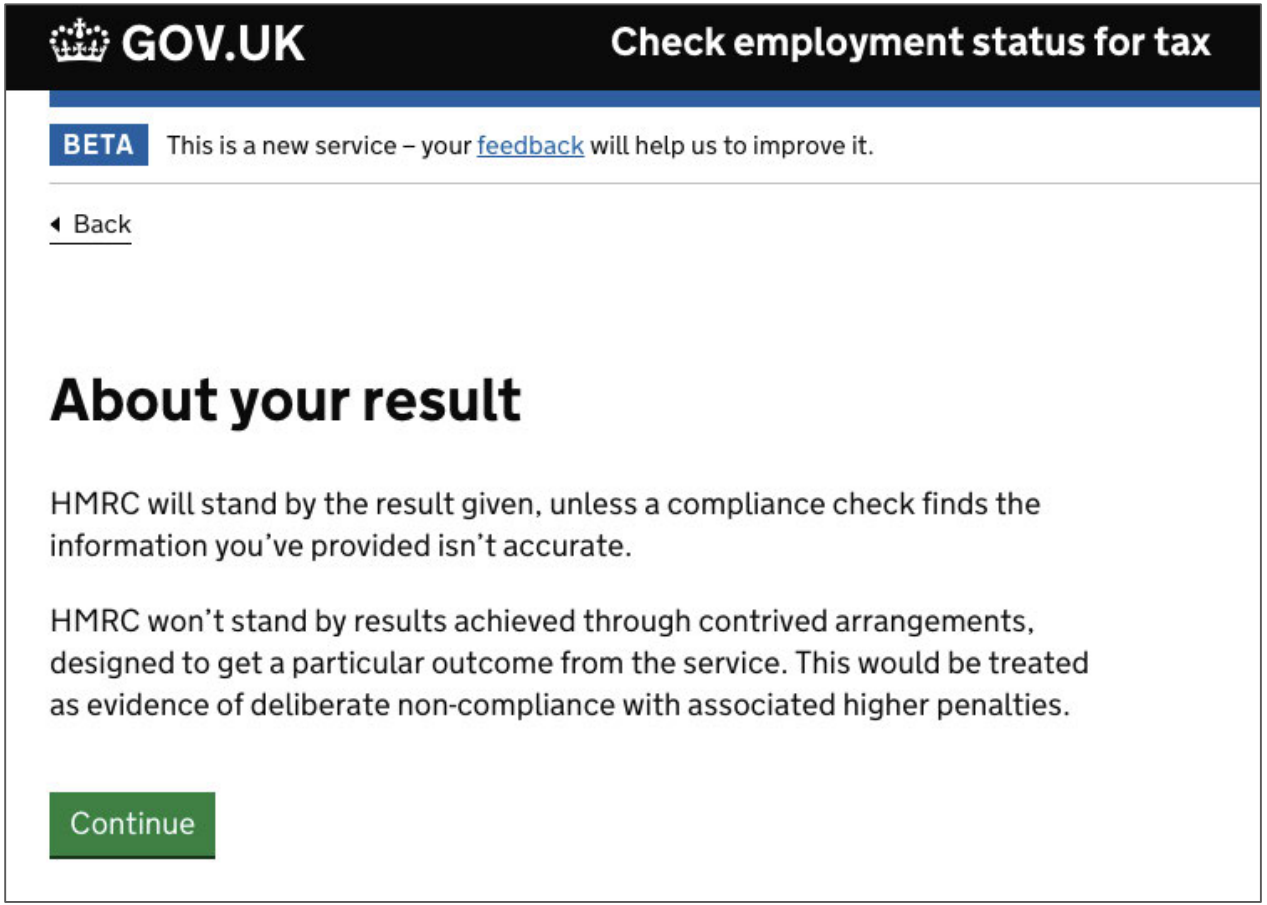
Optimised Content Screens

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

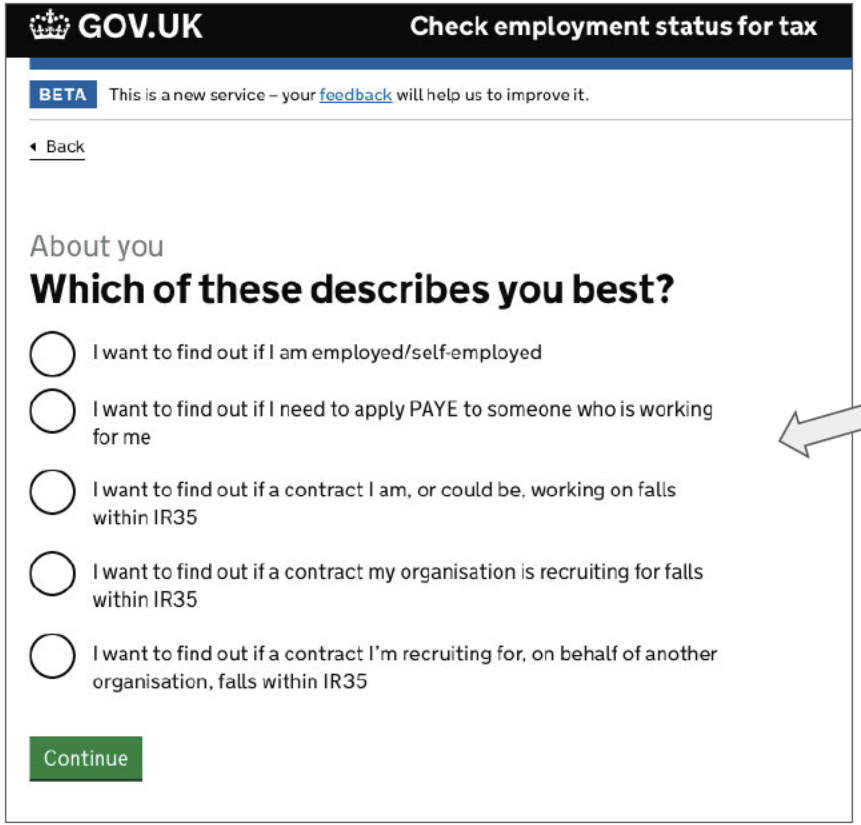


Proposed Guidance (Out of scope for scrum team)

About this result Task



User Task



/live_v2/describeYou2

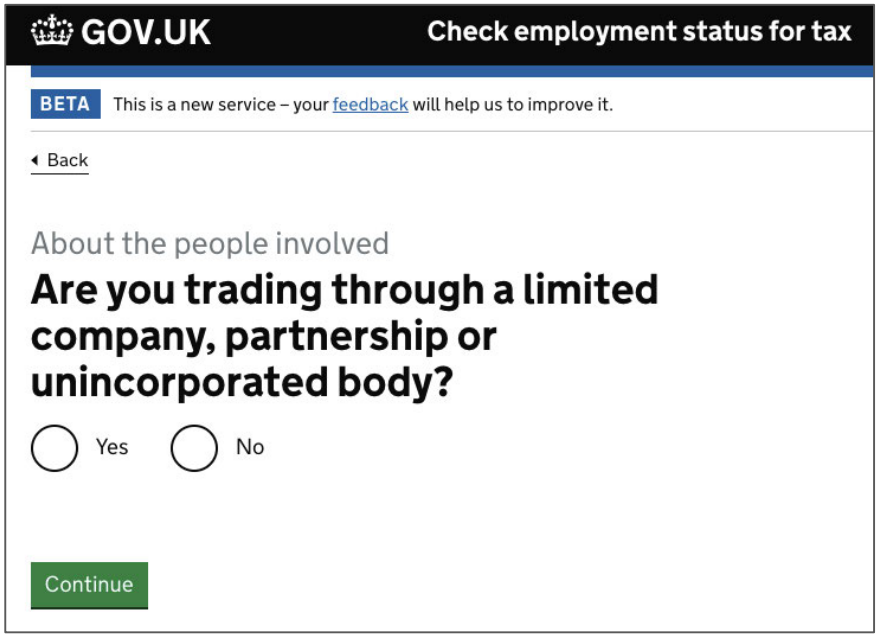
"Do I pay them PAYE" question rather than declaration

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"

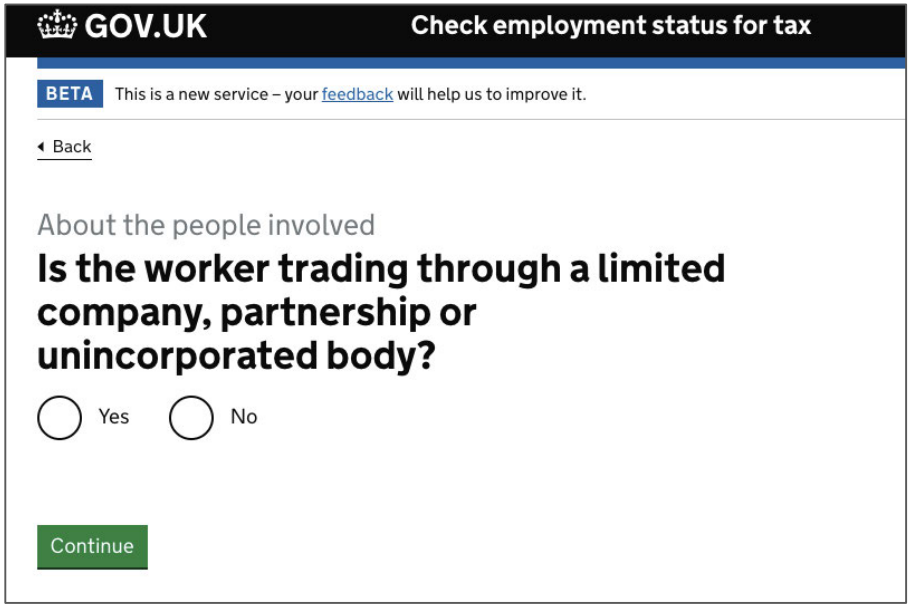
Intermediary

Worker



/live_v2/worker/intermediary

Hirer



/live_v2/hirer/intermediary

Sector

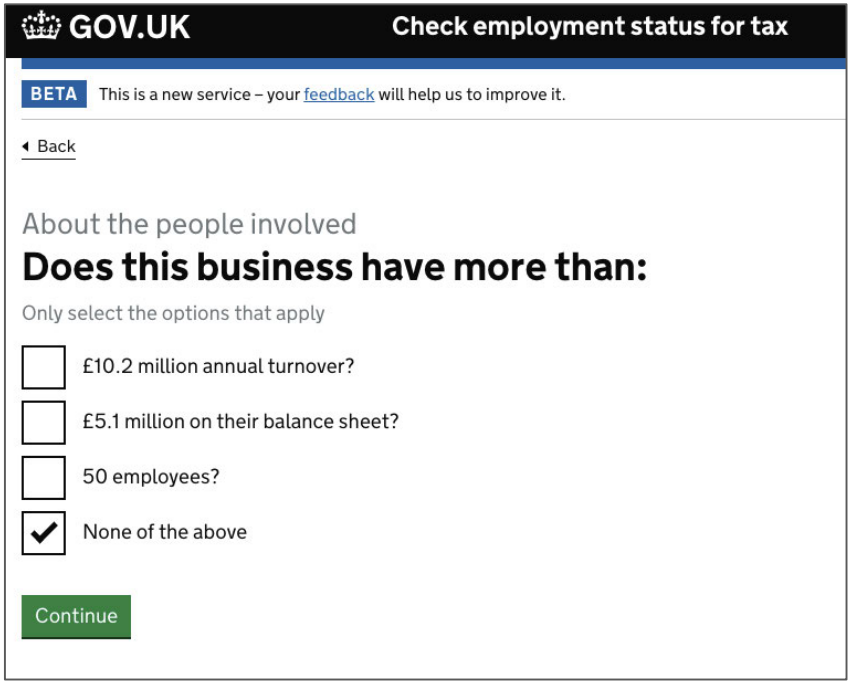
Same for worker and hirer

/live_v2/worker/sector

/live_v2/hirer/sector

Size

Same for worker and hirer



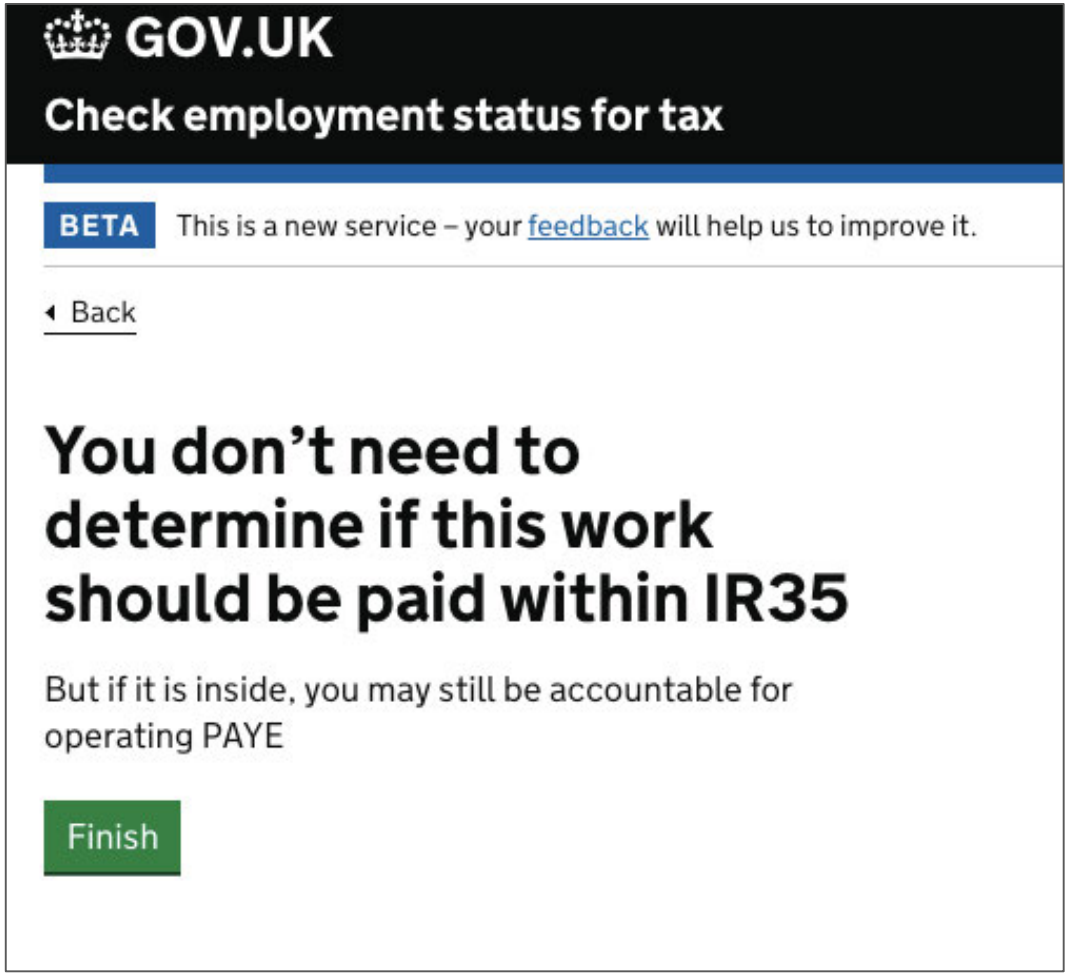
/live_v2/worker/smallBusiness

/live_v2/hirer/smallBusiness

Advisories and Exits

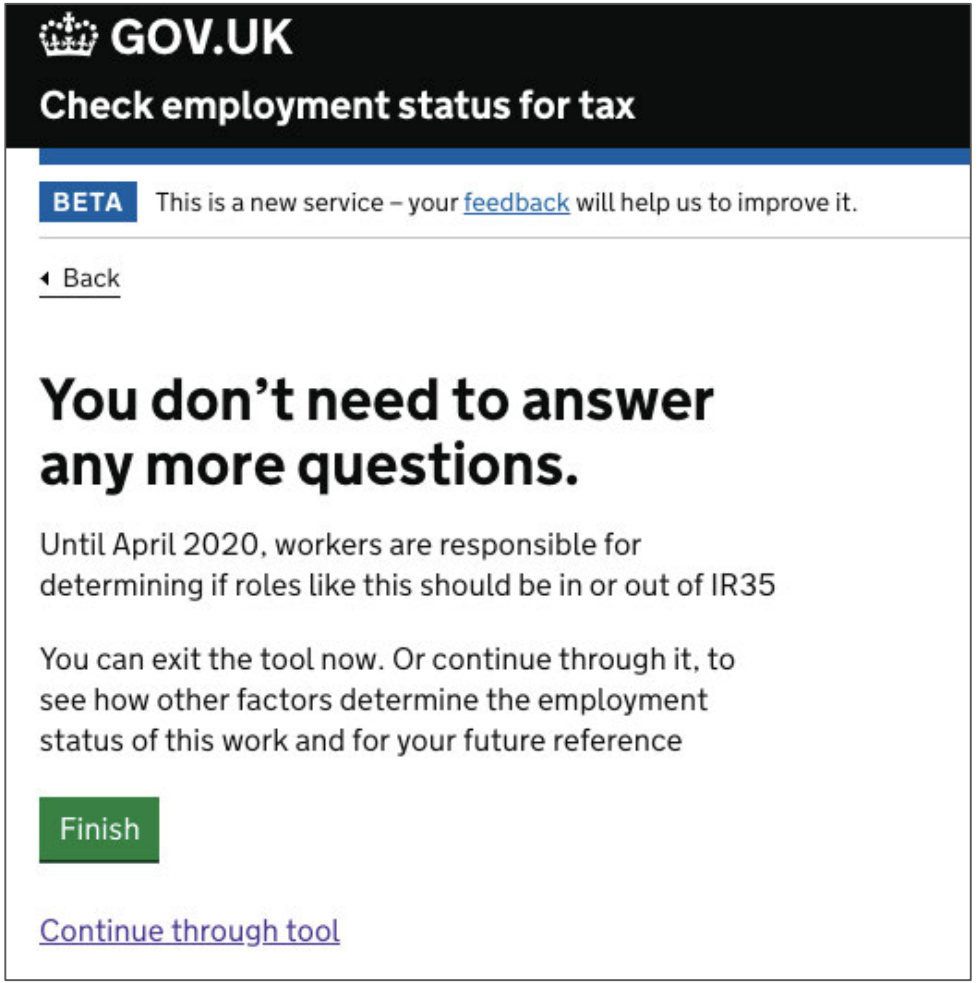
Agency Exit

Full stops in H2



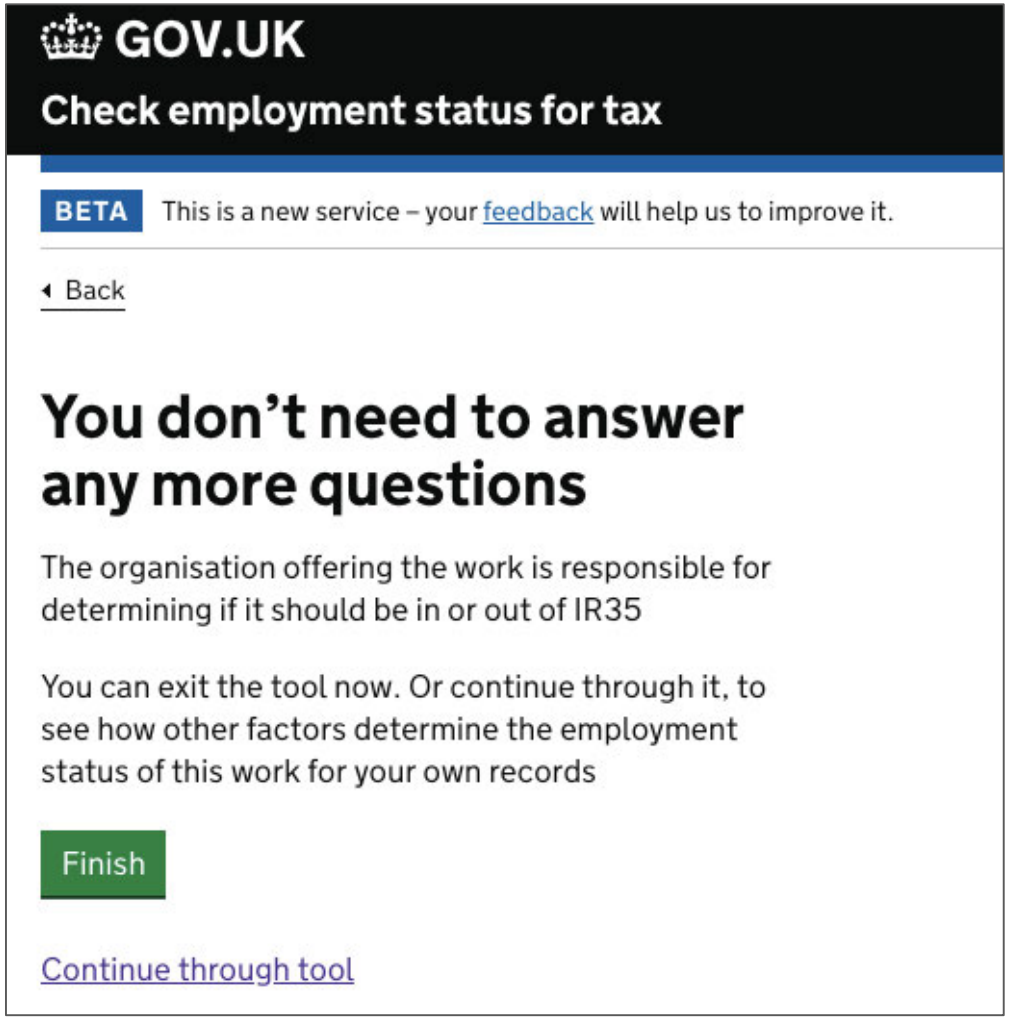
M/L Private Sector Business: Exit OR continue

FULL STOPS NEEDED IN H2



Public Sector Worker: Exit OR continue

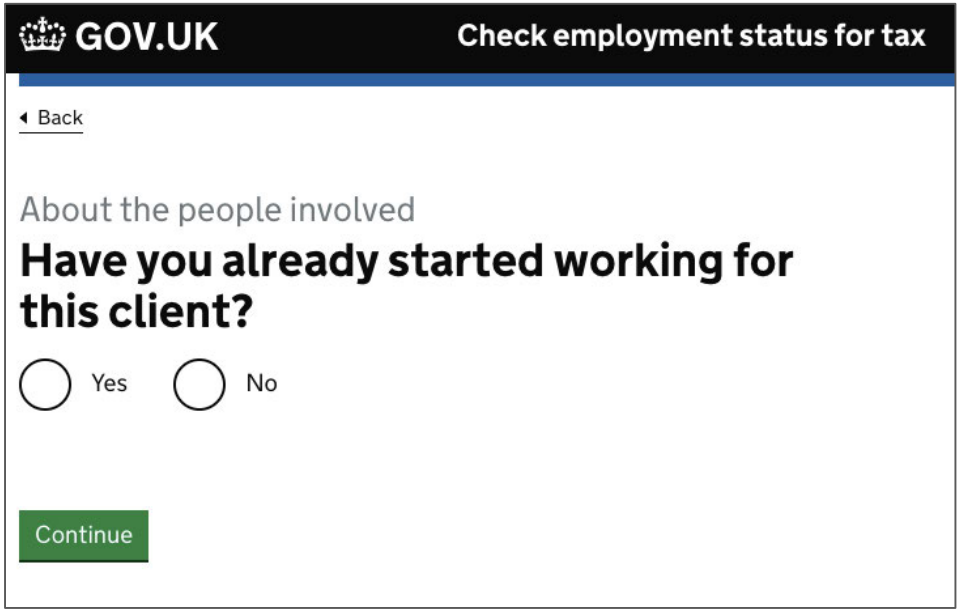
FULL STOPS NEEDED IN H2



Personal Service Section

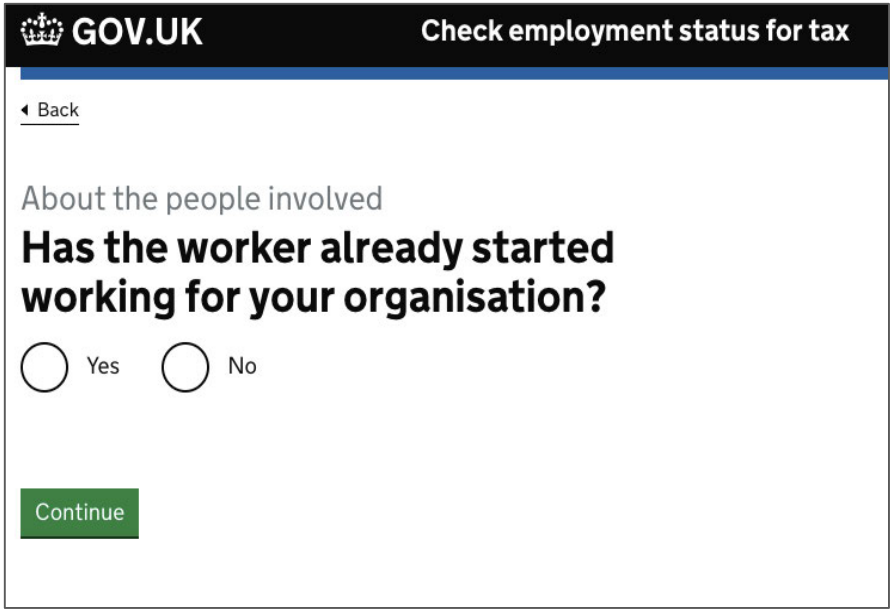
Engagement Started?

Worker



/live_v2/worker/contractStarted

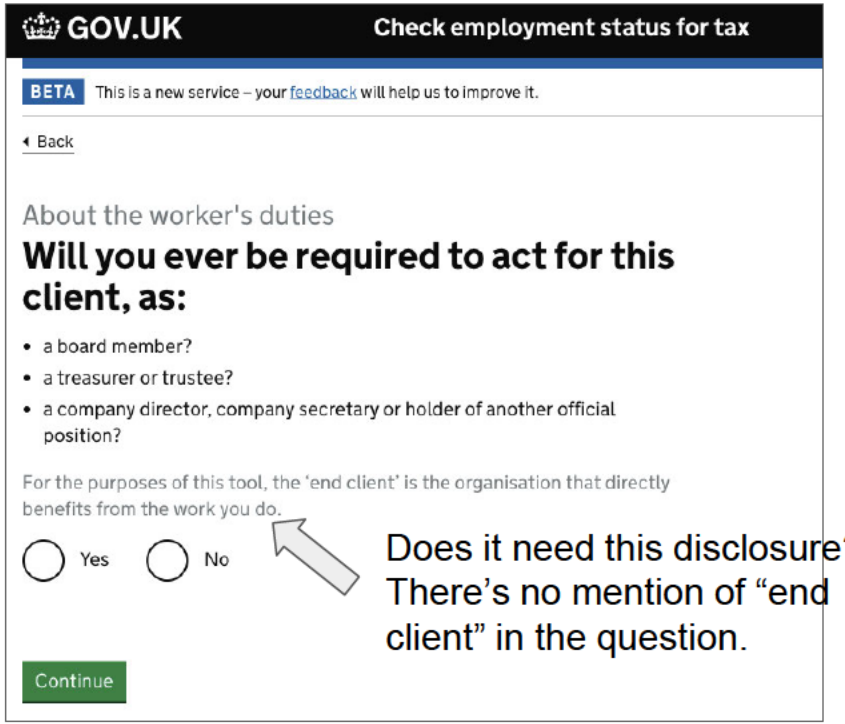
Hirer



/live_v2/hirer/contractStarted

Office Holder

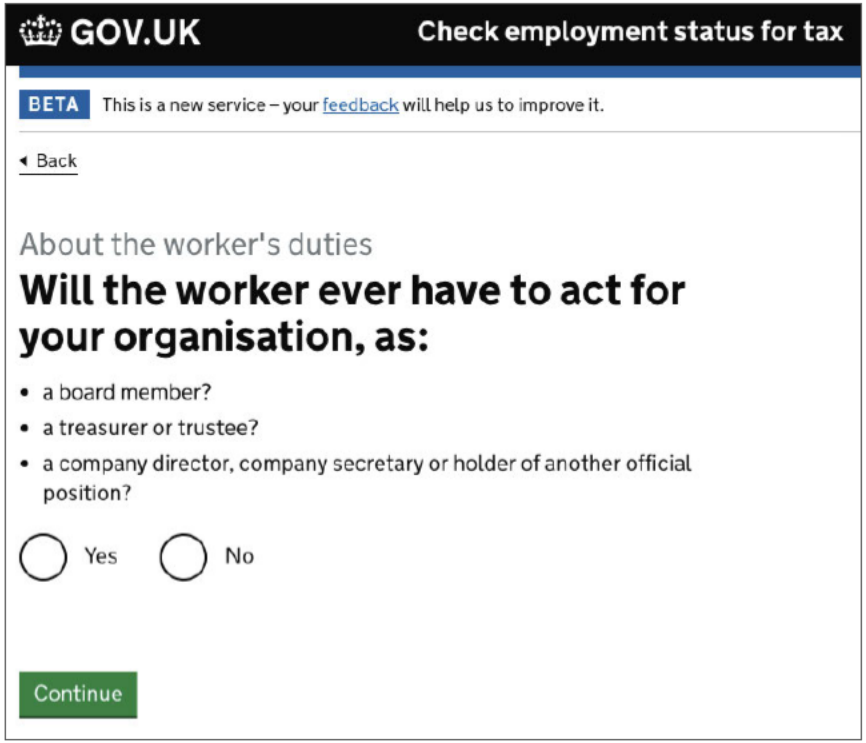
Worker



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

/live_v2/worker/officeHolder3

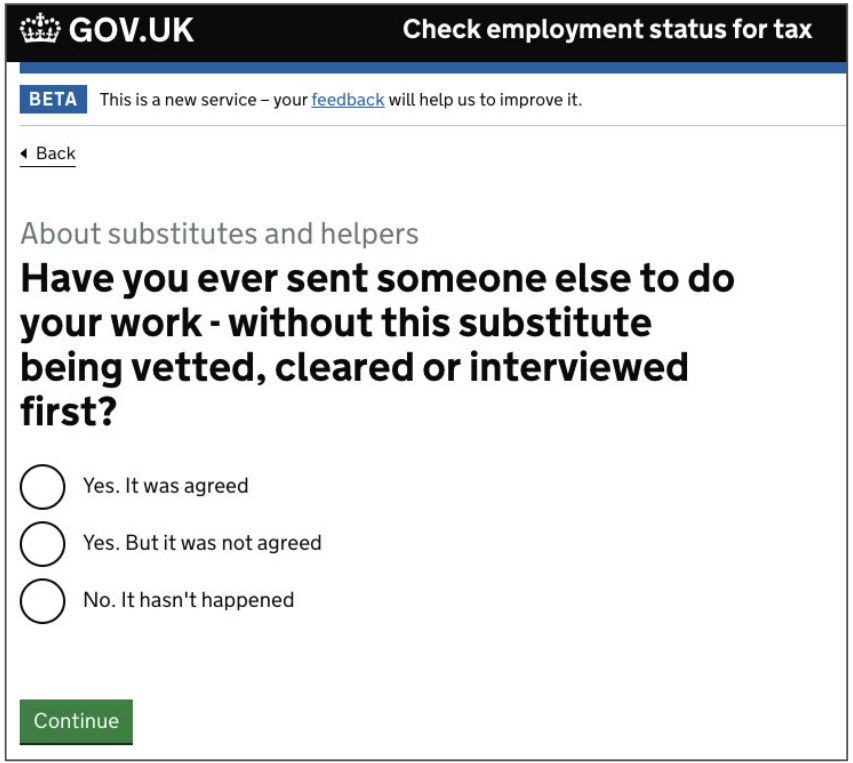
Hirer



/live_v2/hirer/officeHolder3

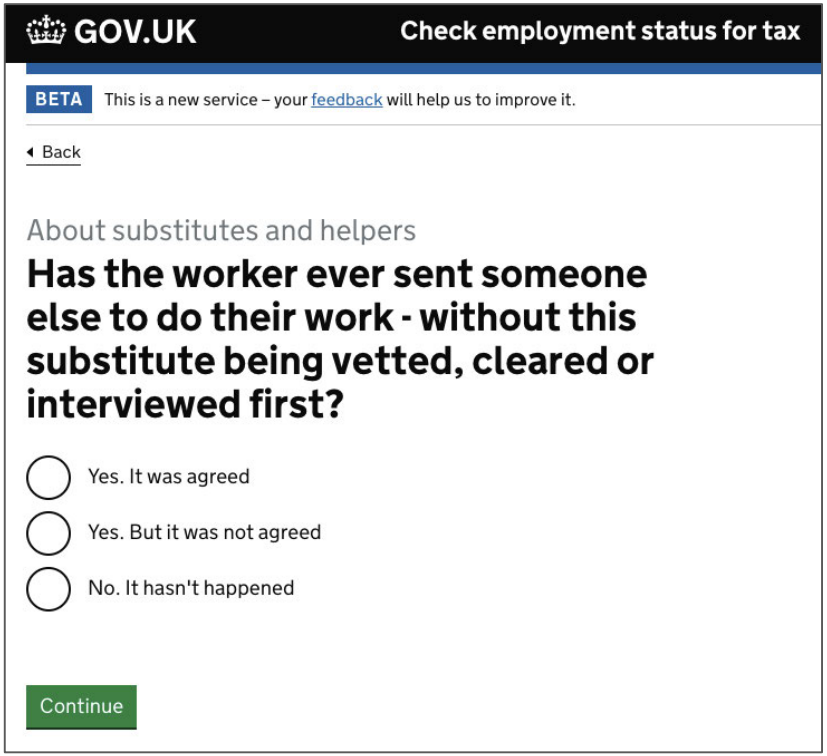
Substitute (Engagement Started)

Worker



/live_v2/worker/substitute

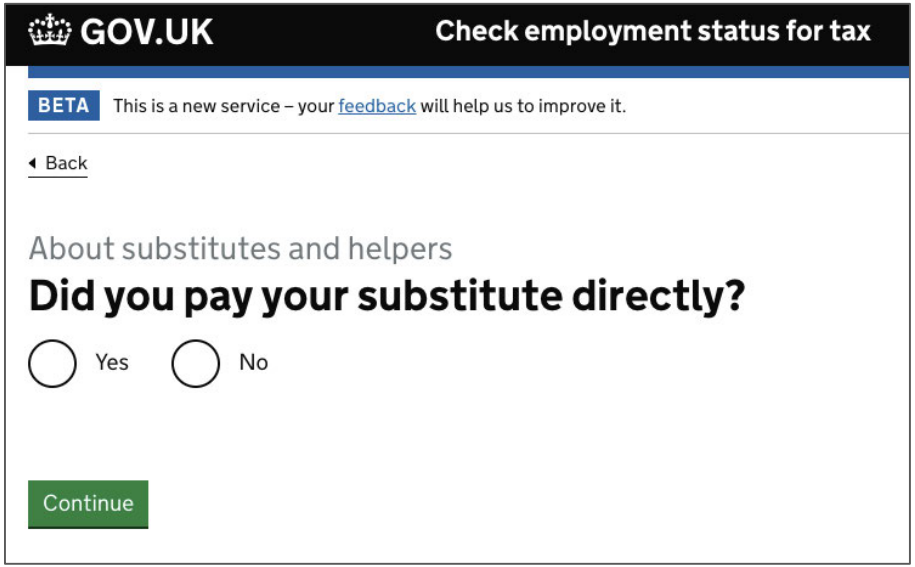
Hirer



/live_v2/hirer/substitute

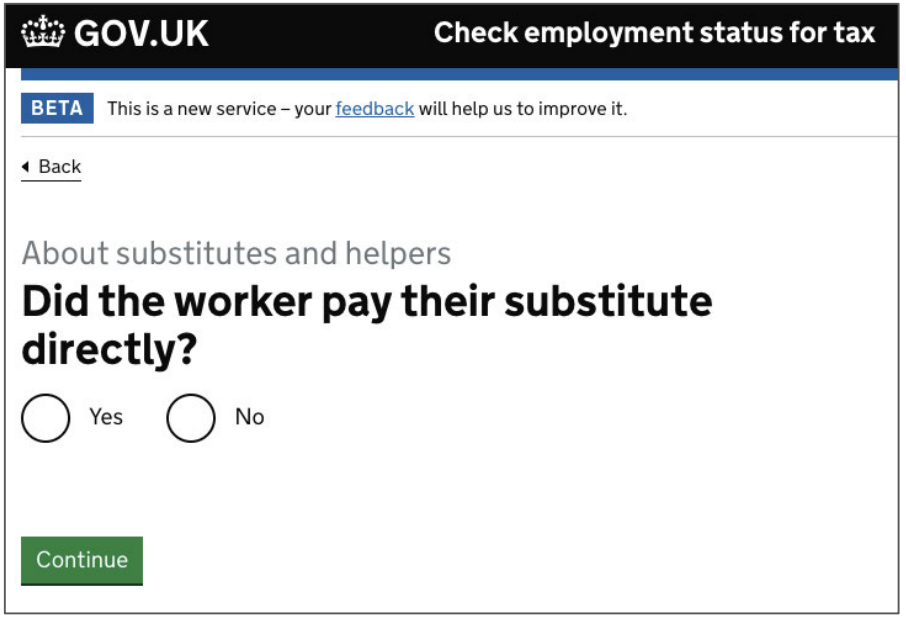
Substitute Paid? (Engagement Started)

Worker



/live_v2/worker/substitutePaid

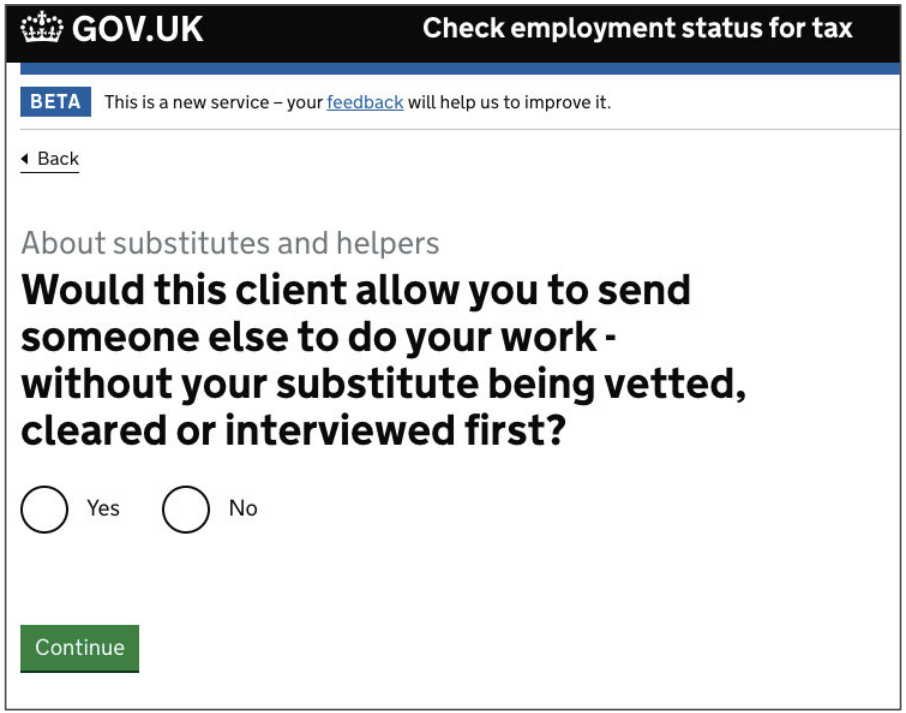
Hirer



/live_v2/hirer/substitutePaid

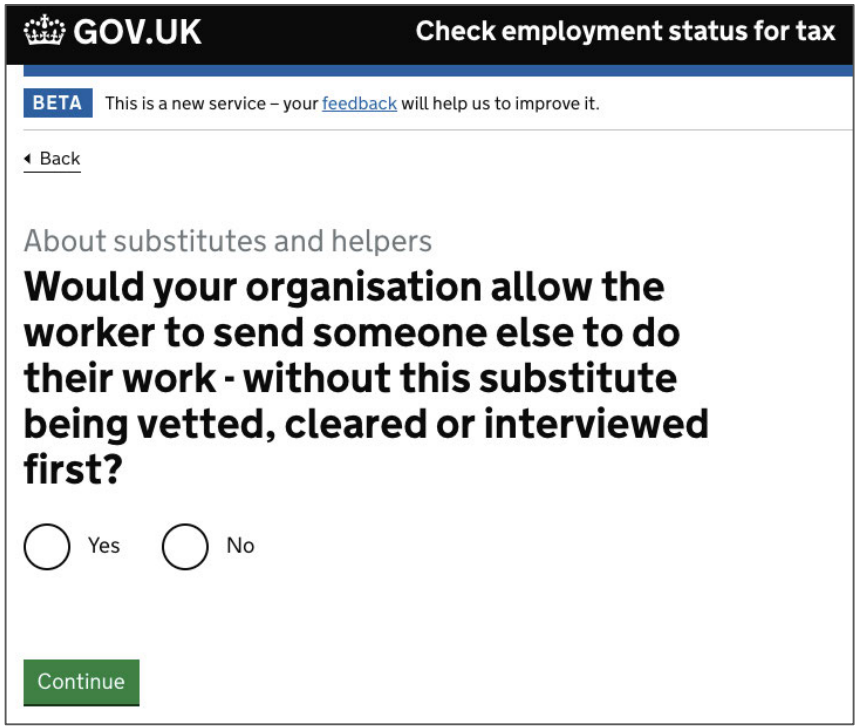
If Substitute (Engagement NOT Started)

Worker



/live_v2/worker/ifSubstitute

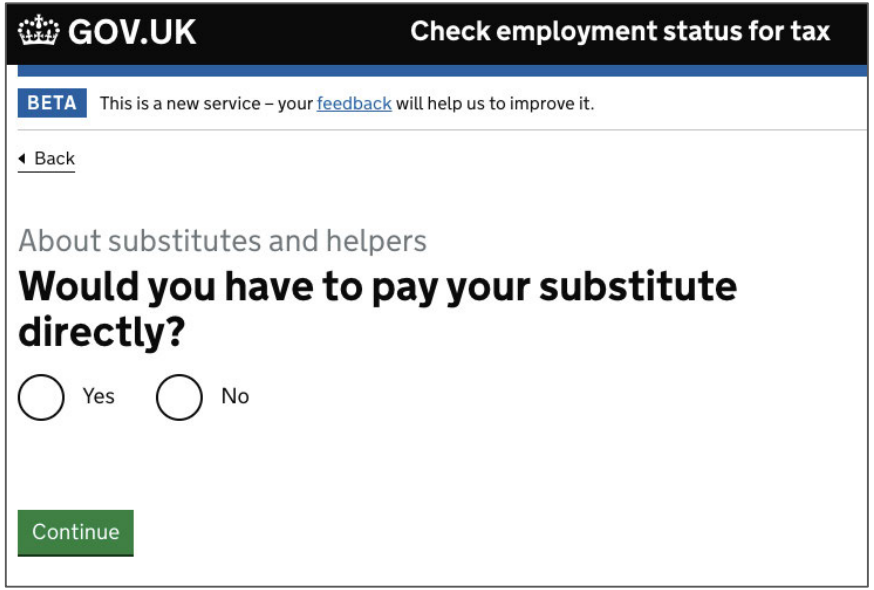
Hirer



/live_v2/hirer/ifSubstitute

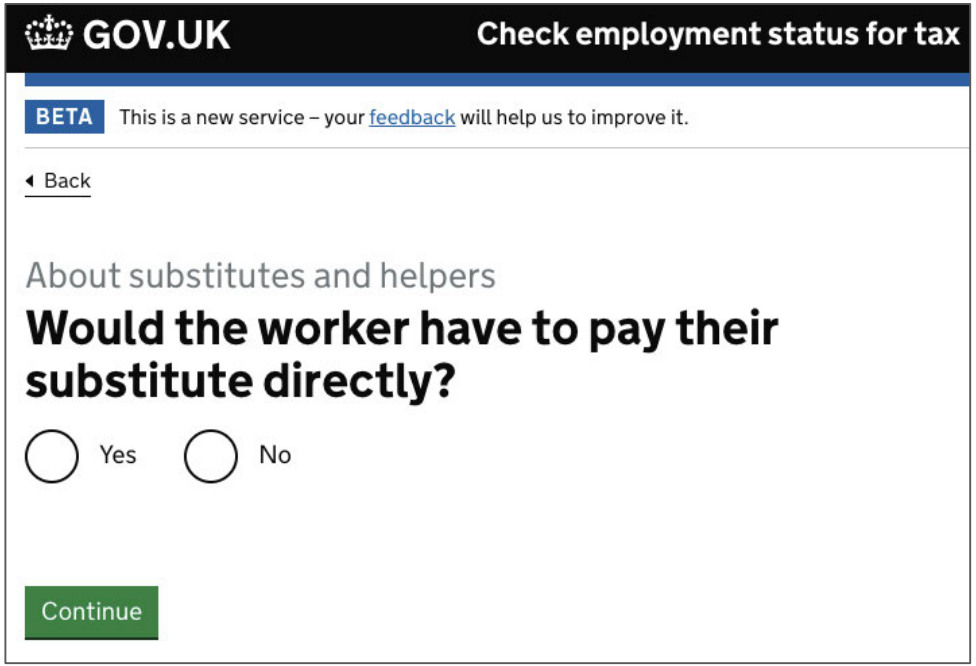
If Substitute Paid? (Engagement NOT Started)

Worker



/live_v2/worker/ifSubstitutePaid

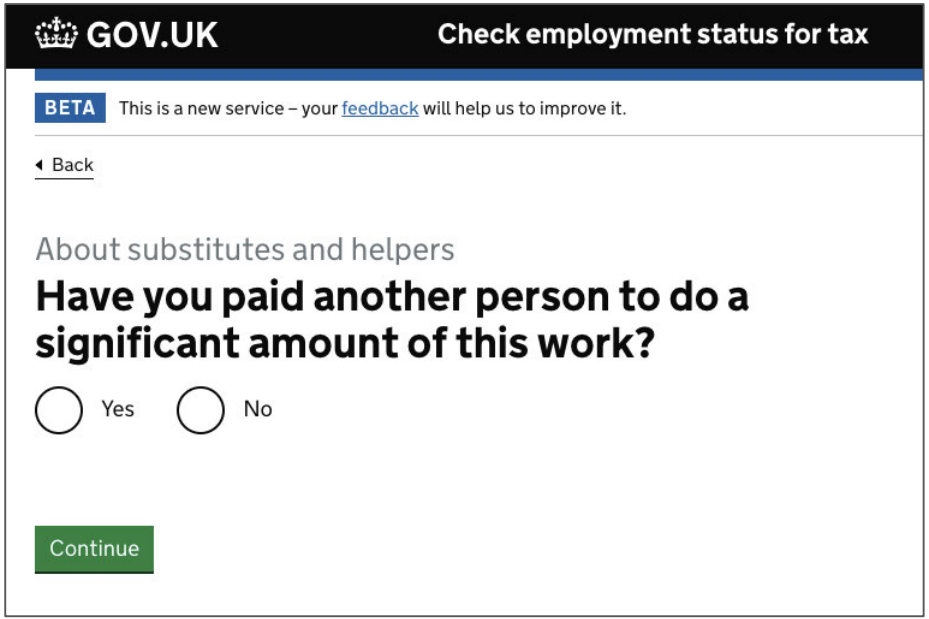
Hirer



/live_v2/hirer/ifSubstitutePaid

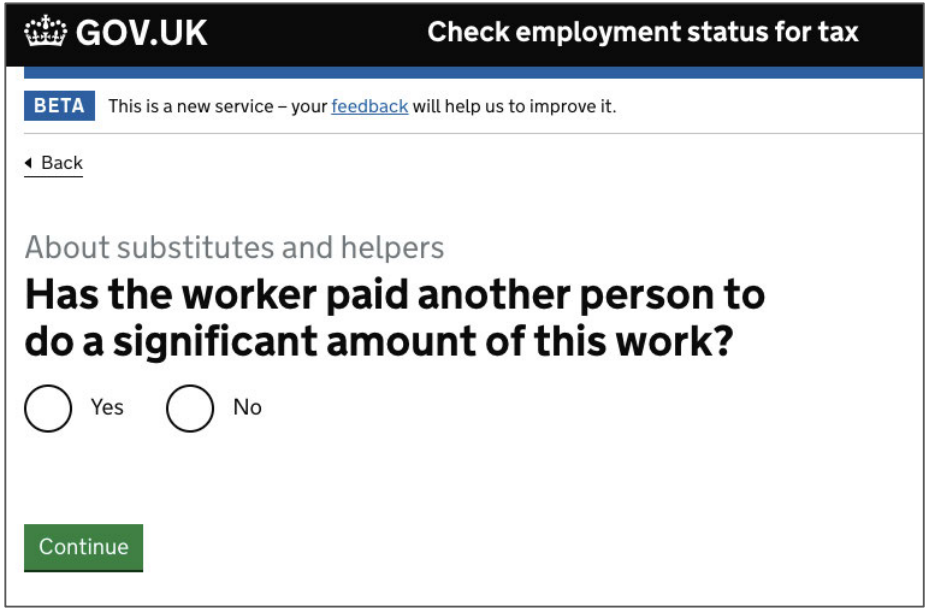
Helper

Worker



/live_v2/worker/helper

Hirer

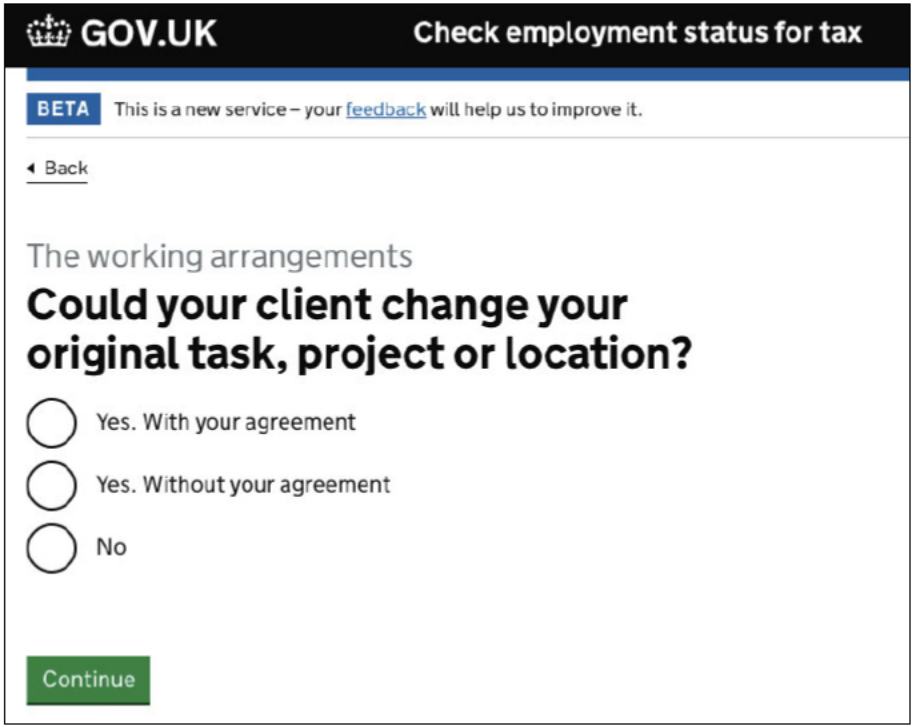


/live_v2/hirer/helper

Control Section

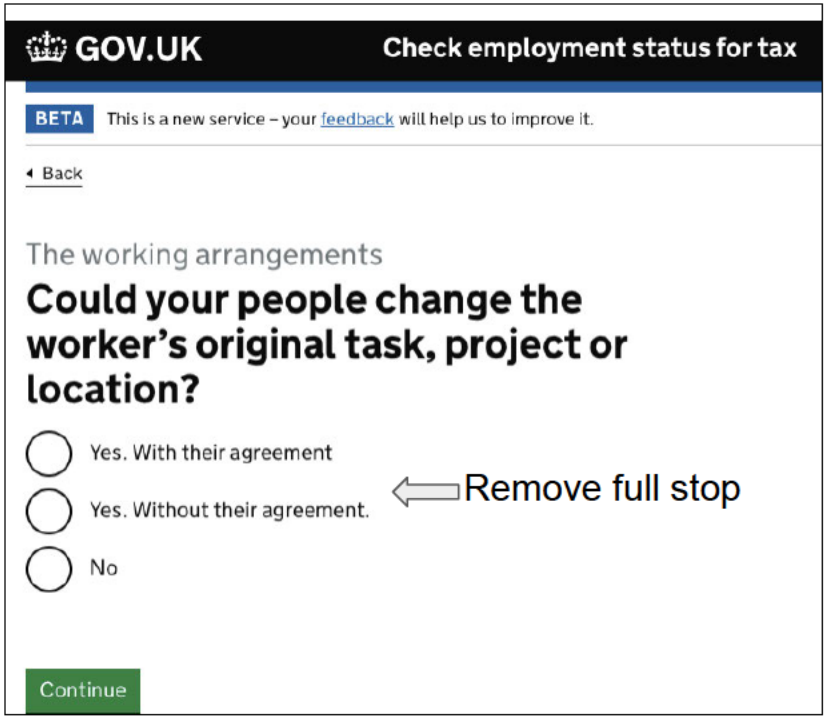
Control 1of4: Task

Worker



/live_v2/worker/controlTask

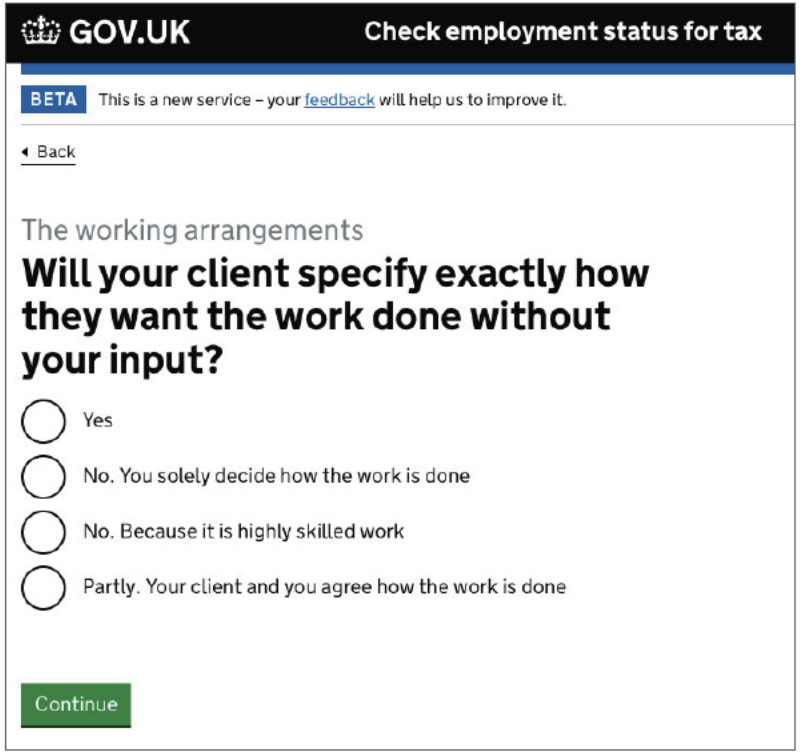
Hirer



/live_v2/hirer/controlTask

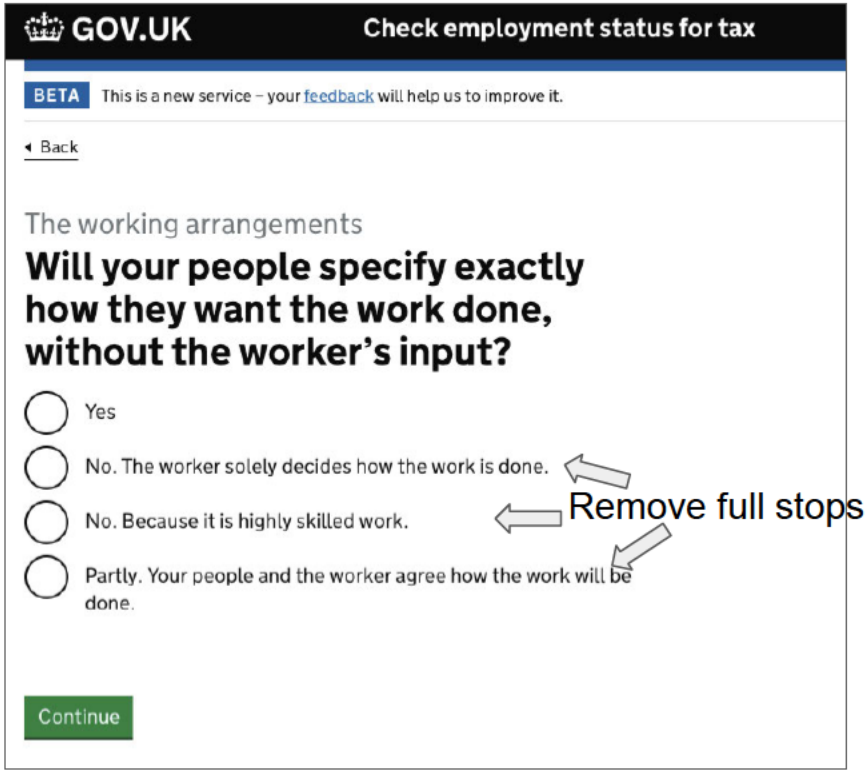
Control 2of4: How

Worker



/live_v2/worker/controlHow

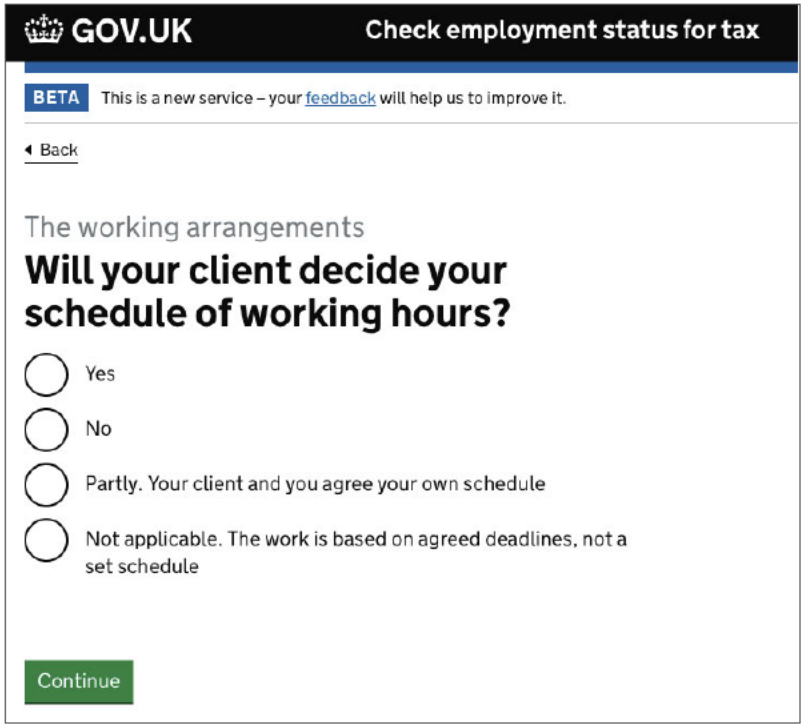
Hirer



/live_v2/hirer/controlHow

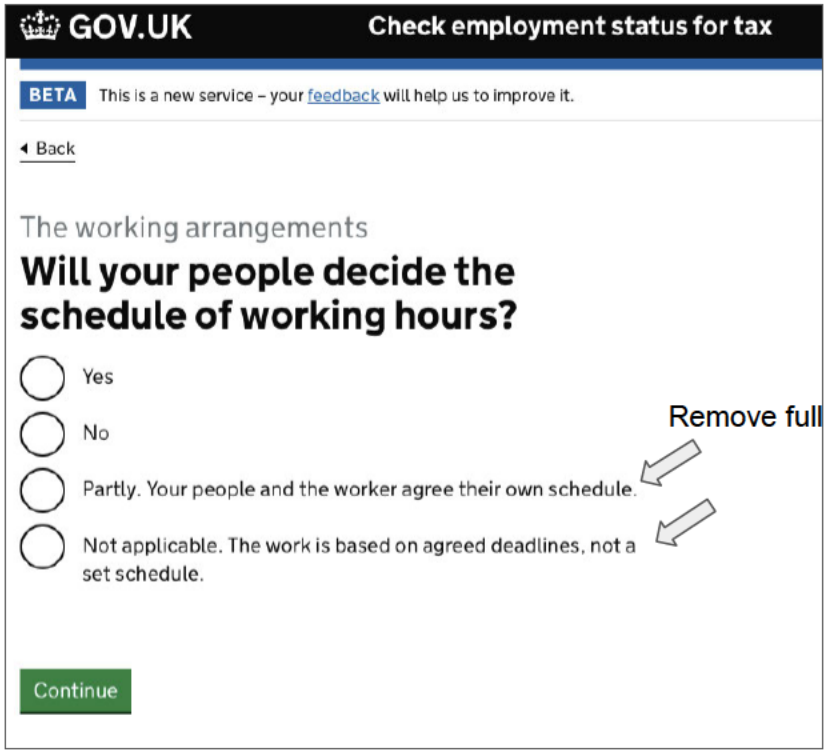
Control 3of4: When

Worker



/live_v2/worker/controlWhen

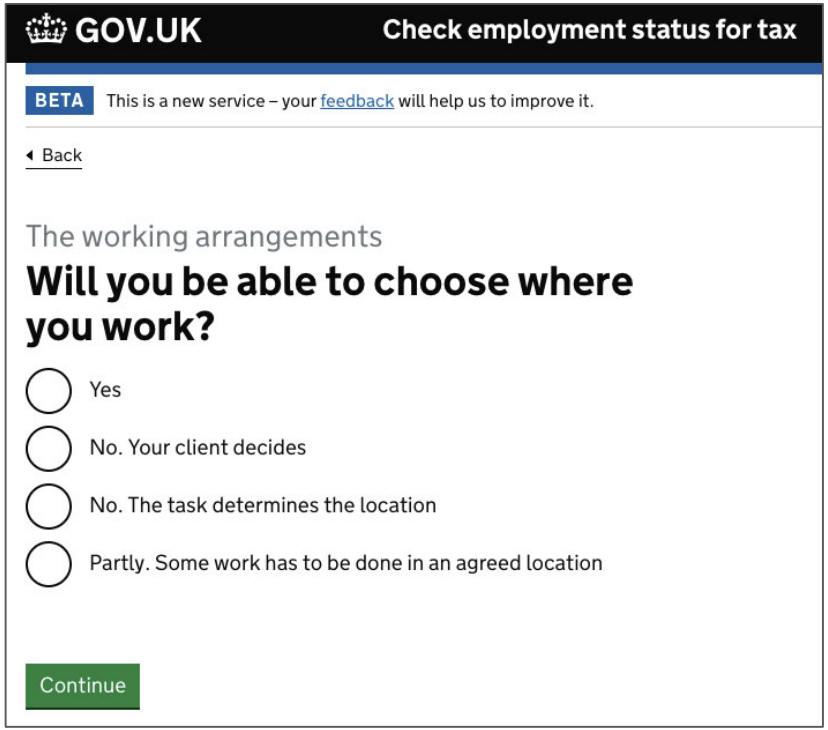
Hirer



/live_v2/hirer/controlWhen

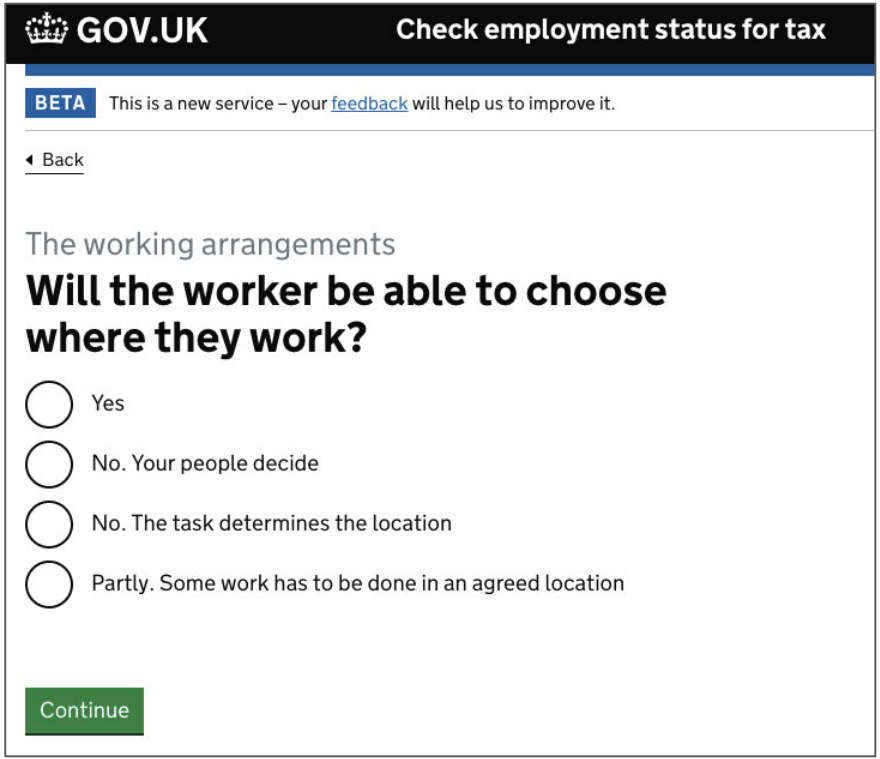
Control 4of4: Where

Worker



/live_v2/worker/controlWhere

Hirer

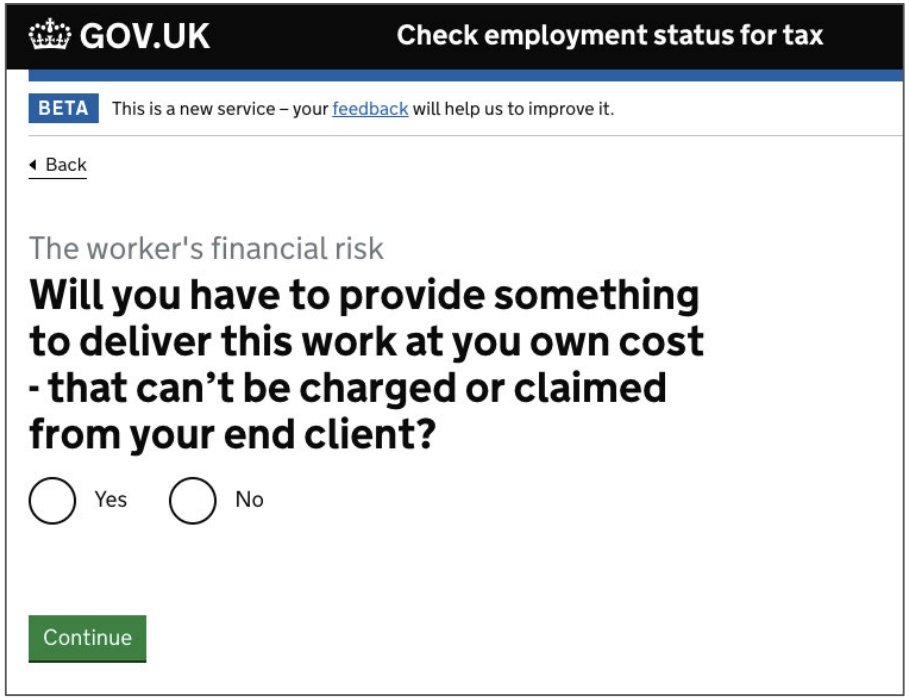


/live_v2/hirer/controlWhere

Financial Risk Section

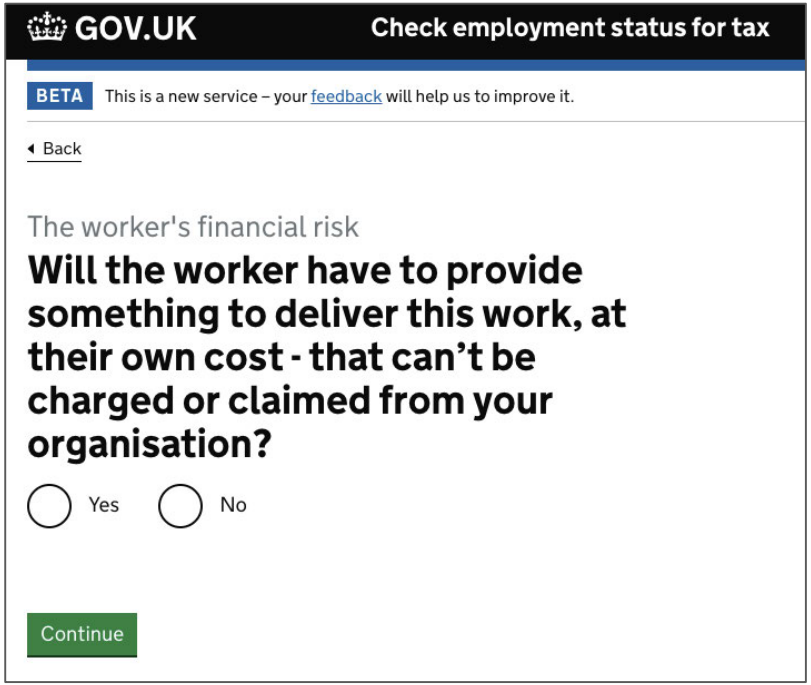
Financial Risk 1of4: Any Expenses?

Worker



/live_v2/worker/expenses

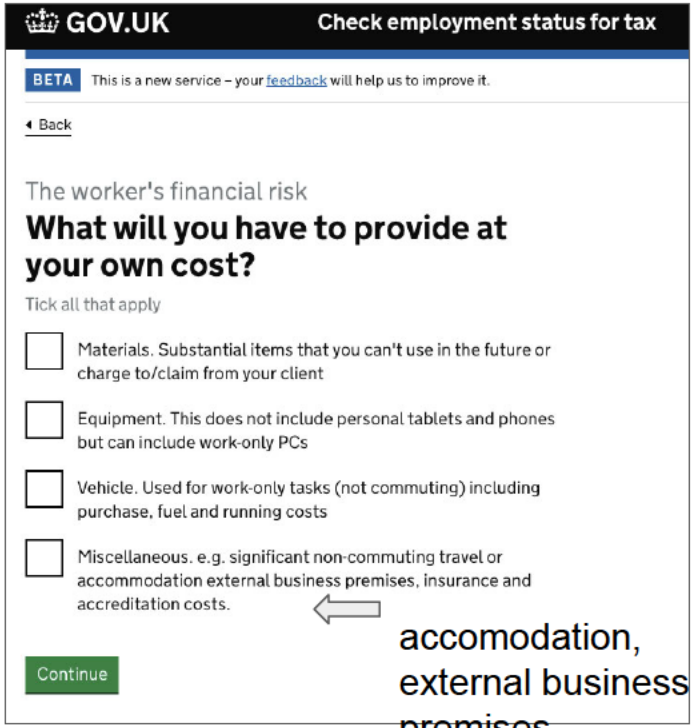
Hirer



/live_v2/hirer/expenses

Financial Risk 2of4: Expense Type

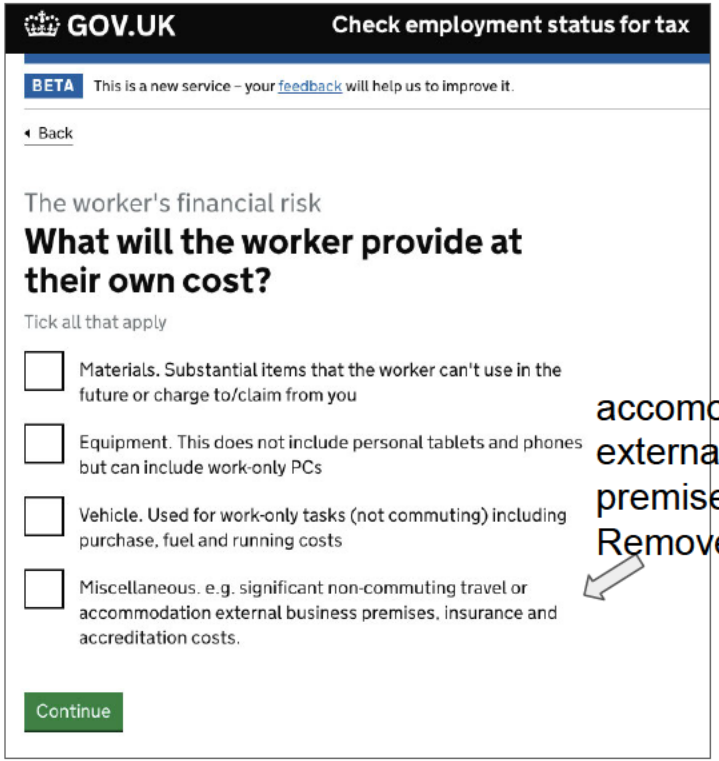
Worker



accomodation, external business premises
Remove full stop

/live_v2/worker/expenses2

Hirer

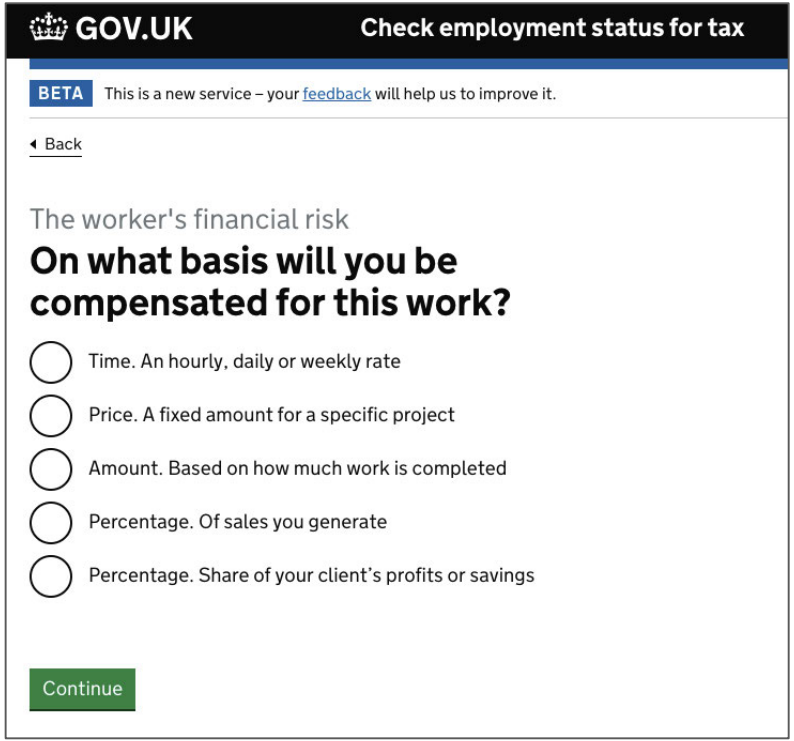


accomodation, external business premises
Remove full stop

/live_v2/hirer/expenses2

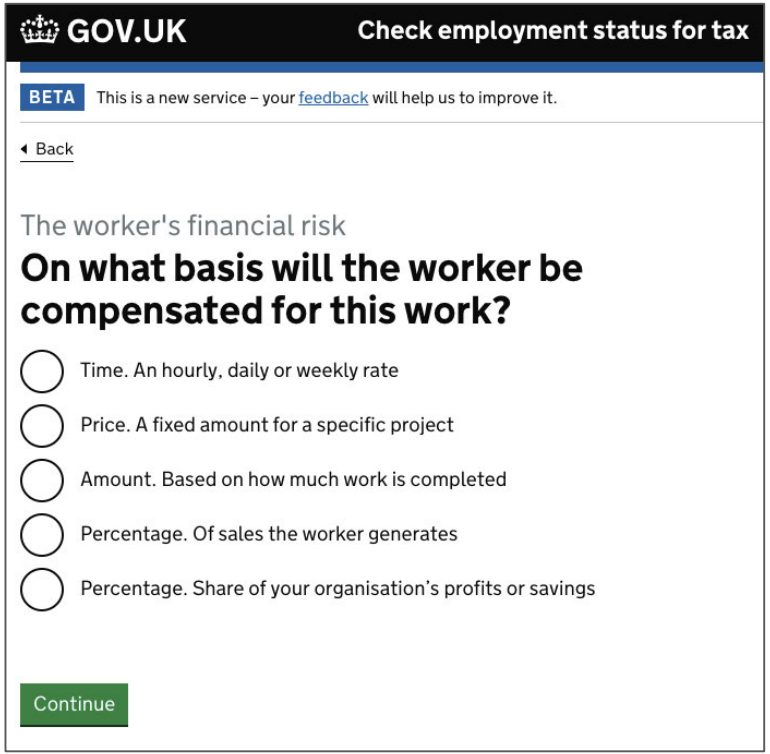
Financial Risk 3of4: Pay

Worker



/live_v2/worker/pay

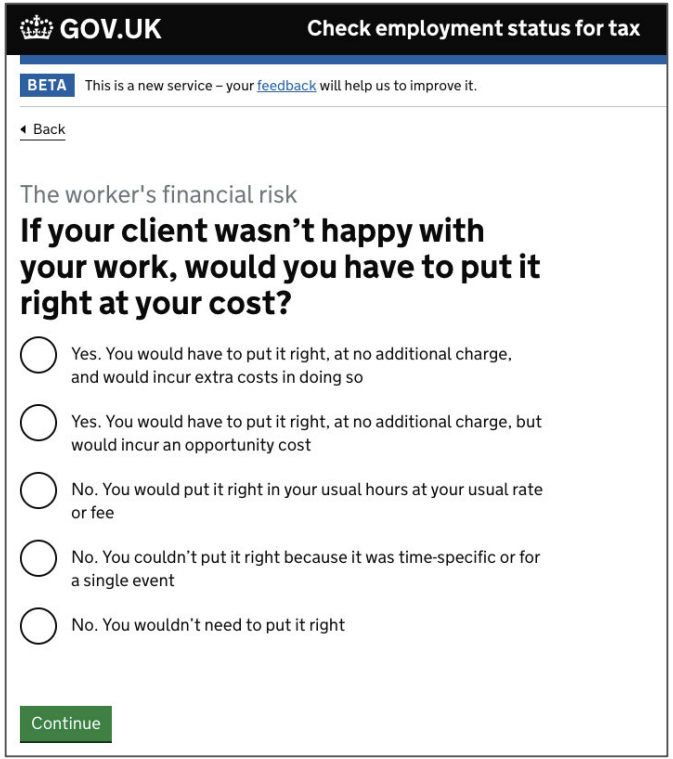
Hirer



/live_v2/hirer/pay

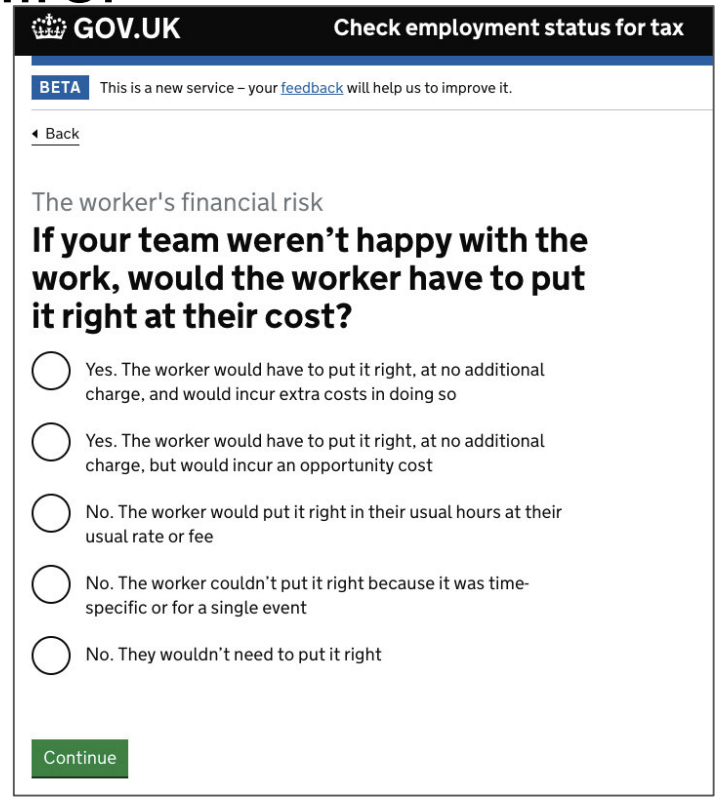
Financial Risk 4of4: Dispute

Worker



/live_v2/worker/dispute

Hirer

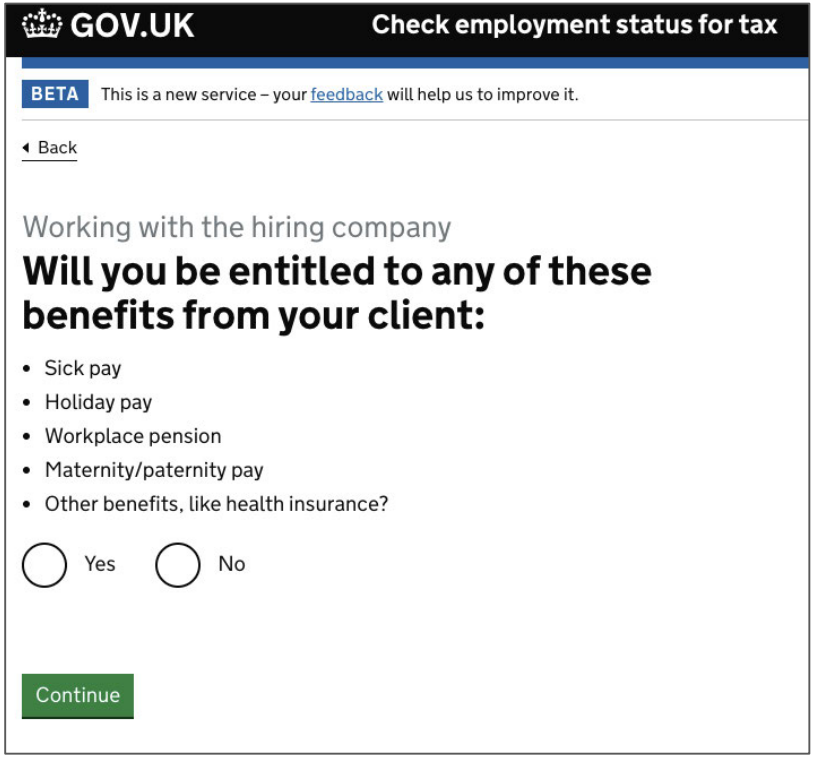


/live_v2/hirer/dispute

Part & Parcel Section

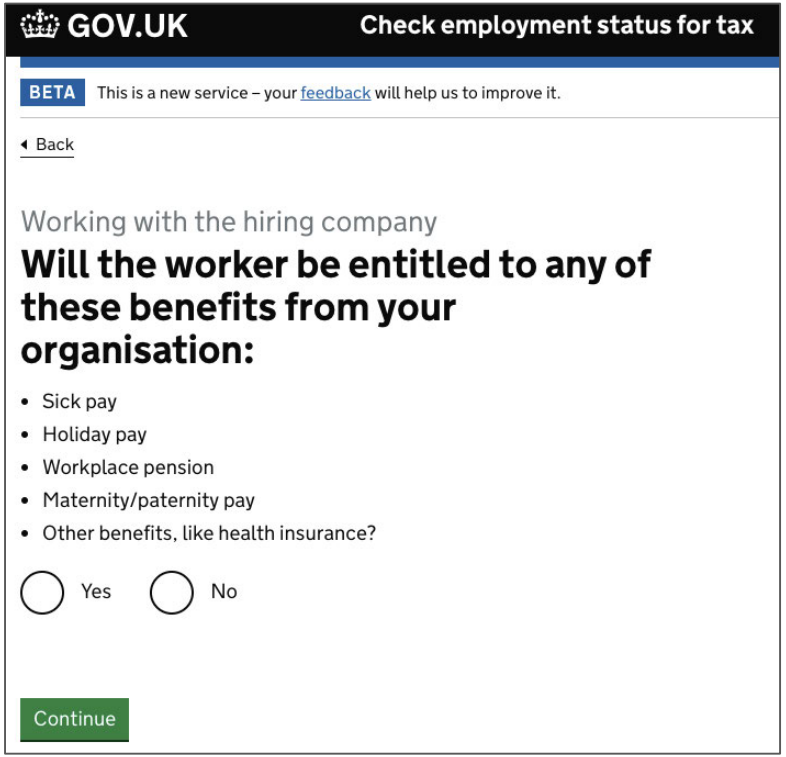
Part & Parcel 1of4: Benefits

Worker



/live_v2/worker/benefits

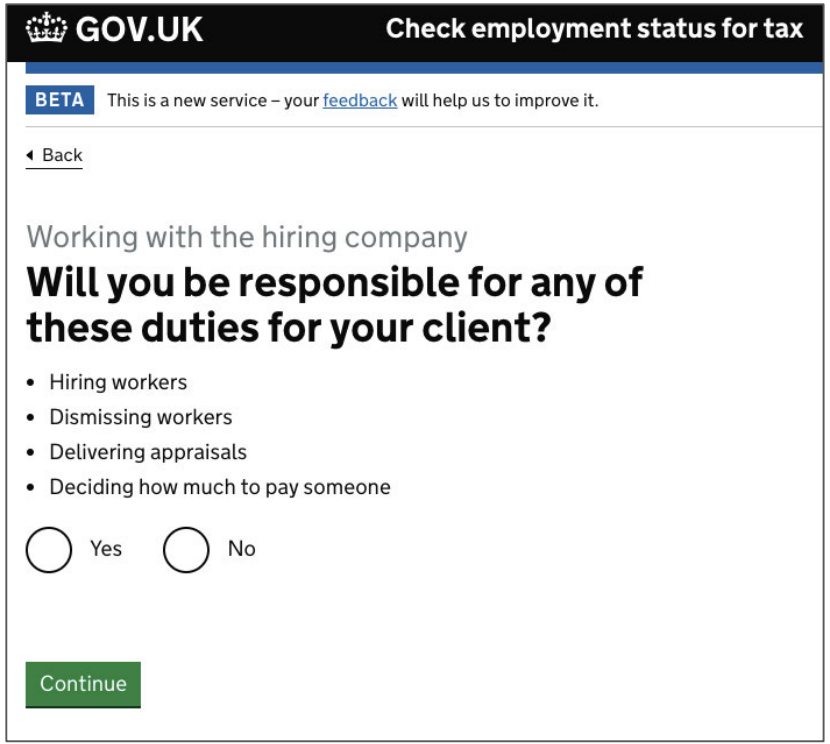
Hirer



/live_v2/hirer/benefits

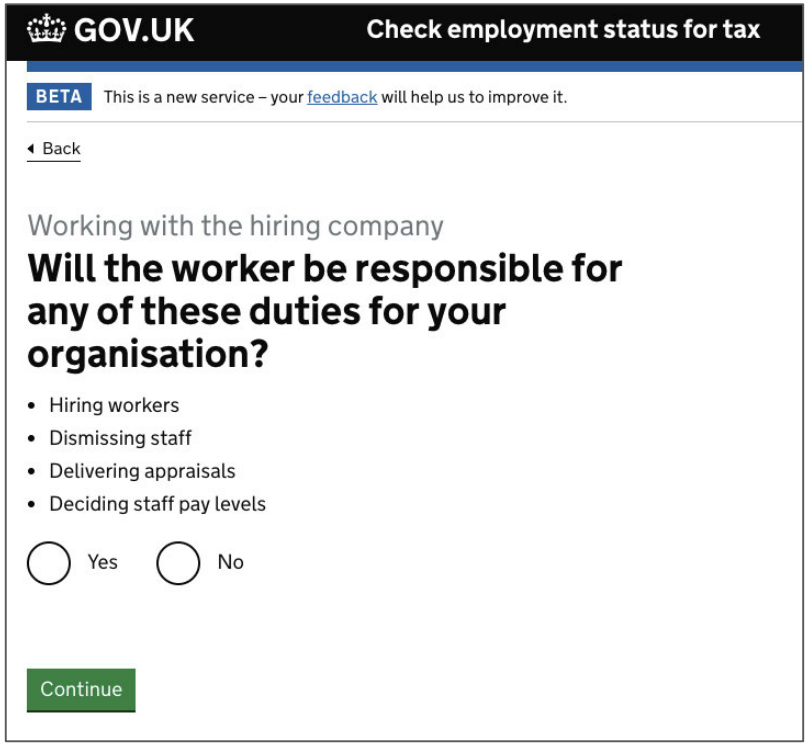
Part & Parcel 2of4: Duties

Worker



/live_v2/worker/duties

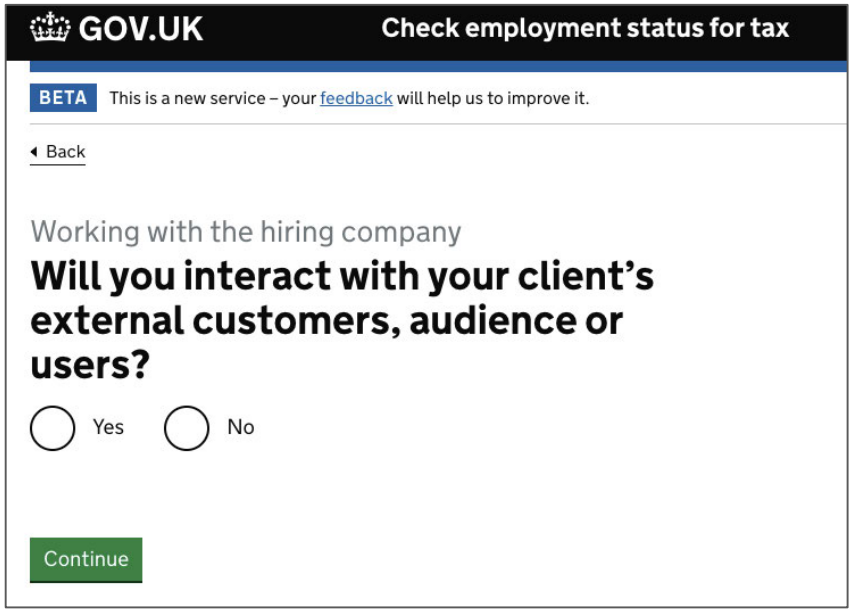
Hirer



/live_v2/hirer/duties

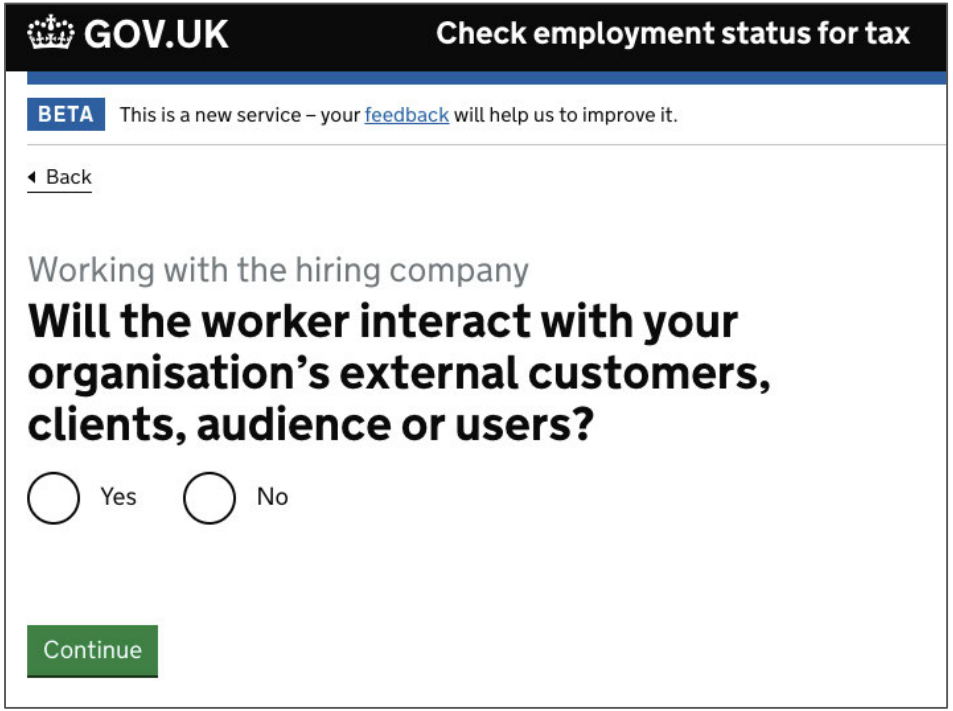
Part & Parcel 3of4: Interaction

Worker



/live_v2/worker/interaction

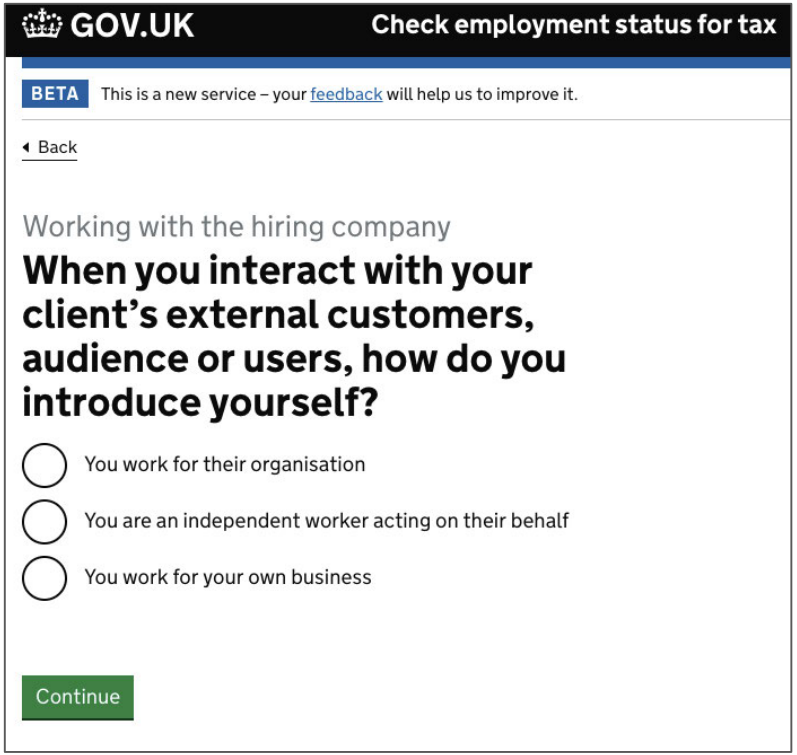
Hirer



/live_v2/hirer/interaction

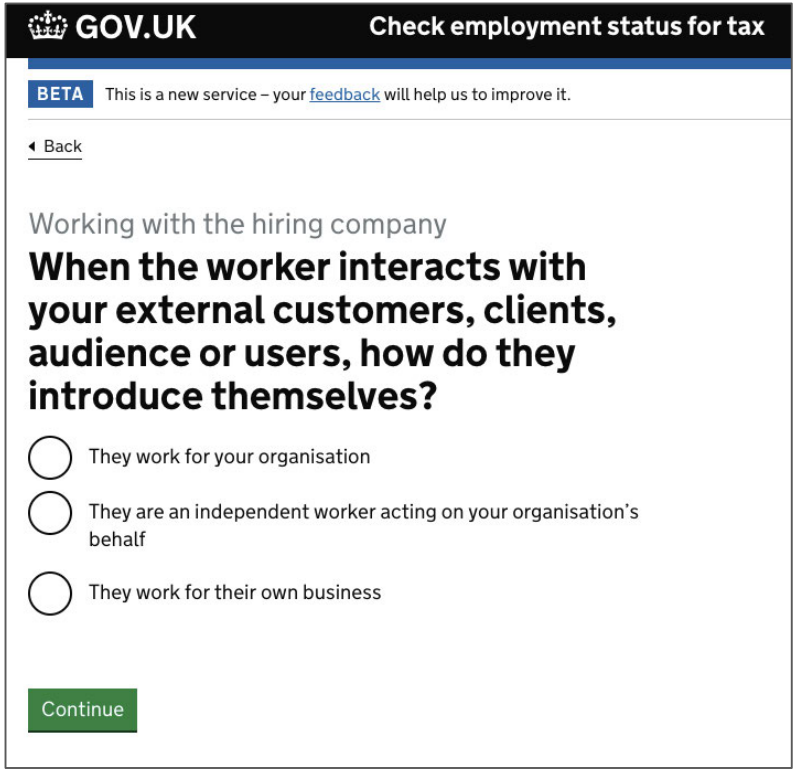
Part & Parcel 4of4: Identity

Worker



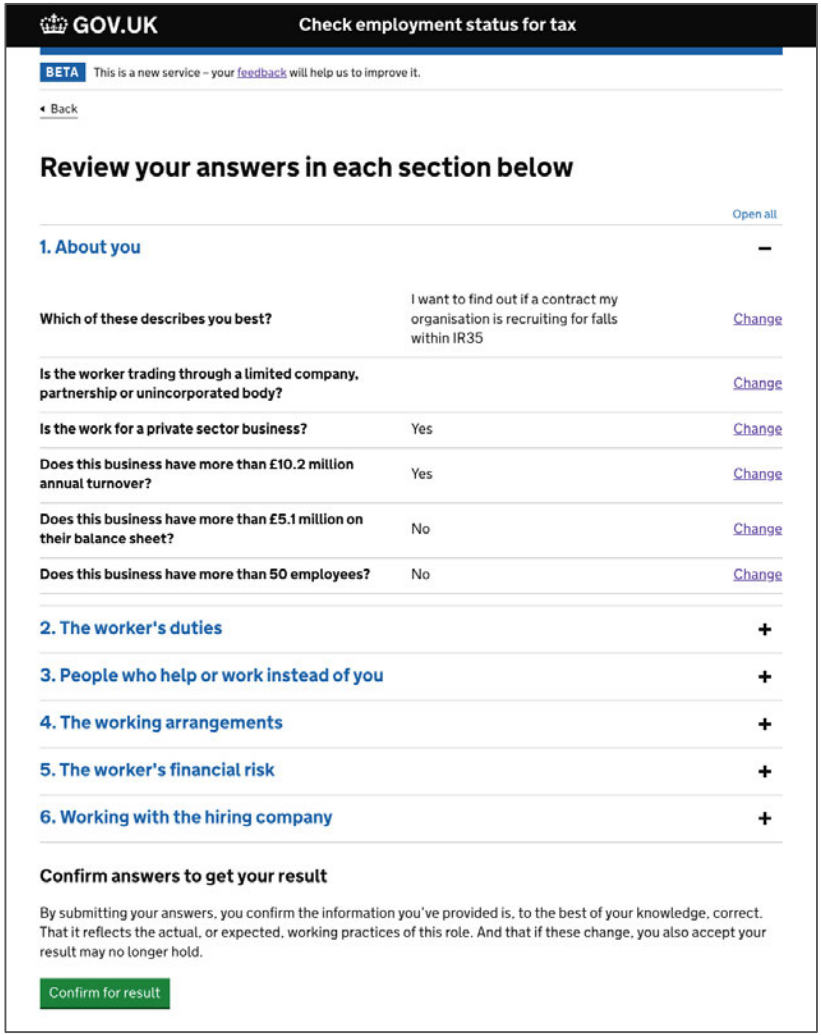
/live_v2/worker/identity

Hirer



/live_v2/hirer/identity

Check answers



GOV.UK Check employment status for tax

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.

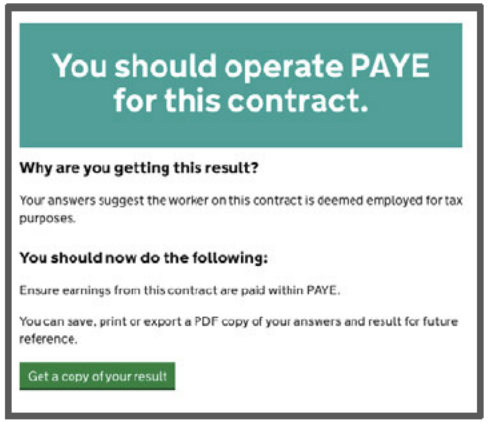
Confirm for result

Result (Inside)

PAYE determination (No Intermediary)

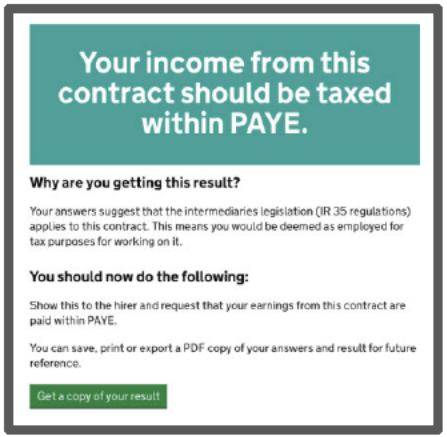
WORKER

HIRER

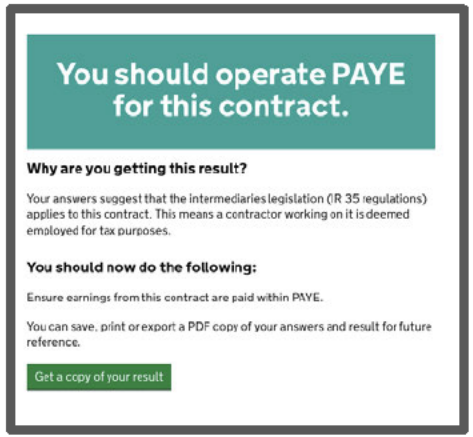


IR35 determination (Intermediaries Legislation)

WORKER



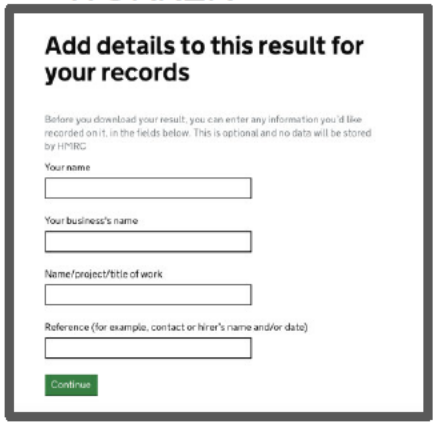
HIRER



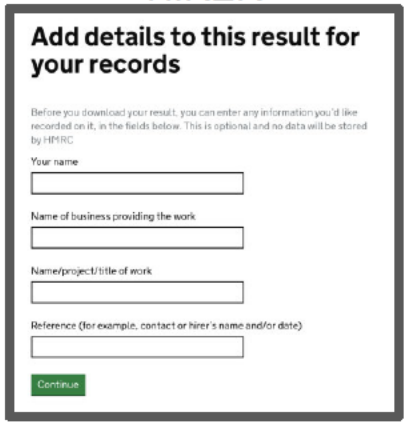
Customise Result

PAYE determination (No Intermediary)

WORKER

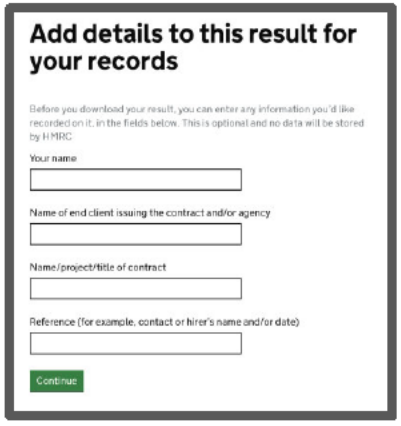


HIRER

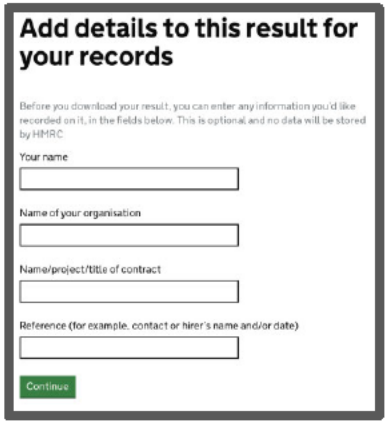


IR35 determination (Intermediaries Legislation)

WORKER



HIRER



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 - 06/03/1	07/03/19 - 20/03/1	21/03/19 - 03/04/1	04/04/19 - 17/04/1	18/04/19 - 01/05/1	02/05/19 - 15/05/1	16/05/19 - 29/05/1	30/05/19 - 12/06/1	13/06/19 - 26/06/1	27/06/19 - 10/07/1
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, Accesibility & 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 Accesibility Testing)

Updates made: Development Lane & Assurance Events

Thank you

Risk and Issues

[redacted]

Number	Description	Mitigation	Owner	Status
1	Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act. There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.	1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard 2 - Store data in an easily accessible format 3 - Be as transparent as possible e.g. UAT in GitHub	[redacted]	Closed
2	Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance	**Escalated to project risk register (Risk and Issues bi-weekly call)** 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.	[redacted]	Closed
3	Deskpro secure email is currently unsupported on a day to day basis	**Escalated to project risk register (Risk and Issues bi-weekly call)** Customer Service Group have agreed to support the deskpro service.	[redacted]	Closed
4	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. **See Assumption No. 2**	**Escalated to project risk register (Risk and Issues bi-weekly call)**	[redacted]	Closed
5	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.	This is mitigated by using a common style guide and [redacted] kindly offered to talk if we had any major concerns. Content designer allocated. We have access to Gov.uk content via Sharepoint. **Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)**	[redacted]	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 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

Username:

Password:

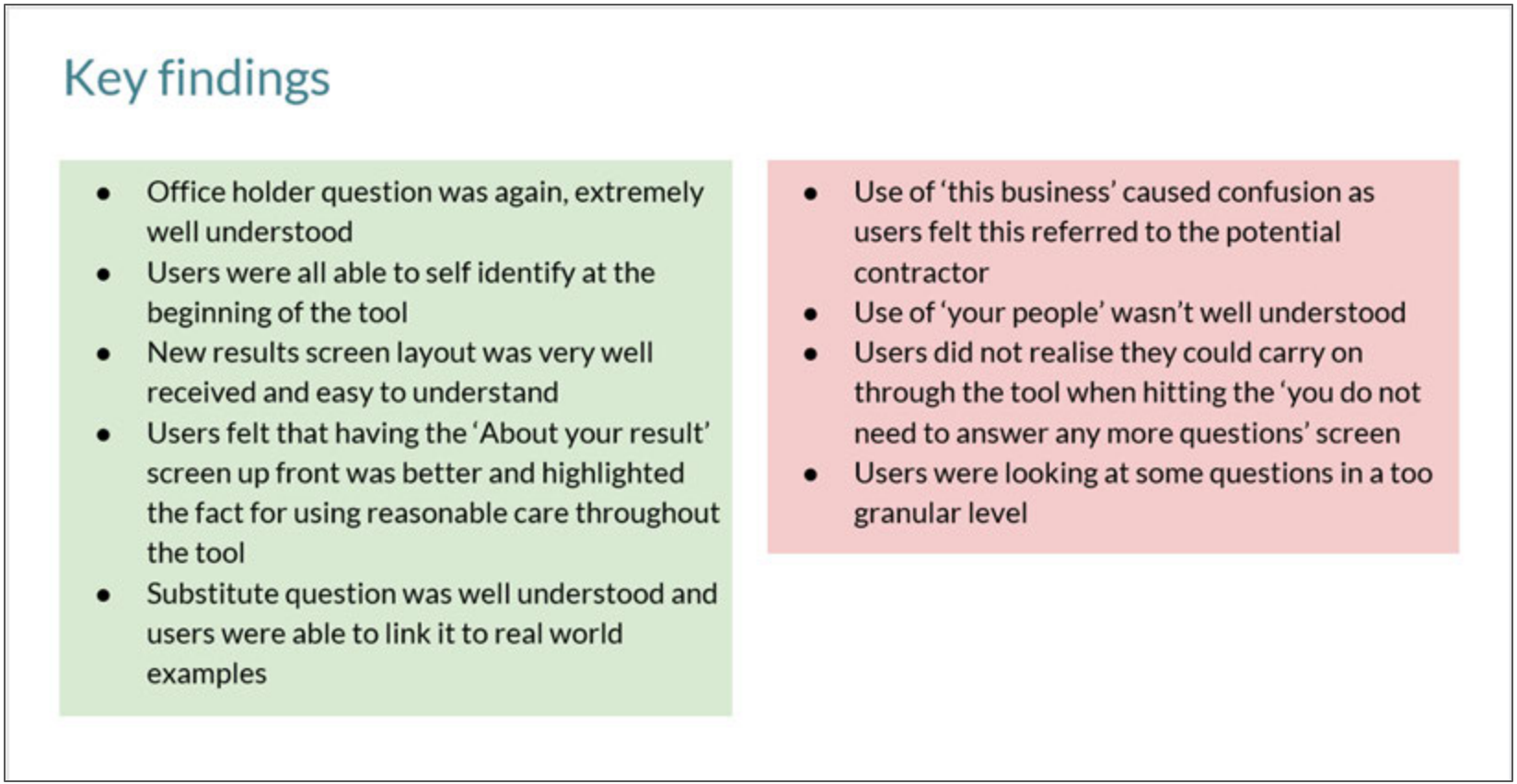
Done during this sprint

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



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 - 06/03/1	07/03/19 - 20/03/1	21/03/19 - 03/04/1	04/04/19 - 17/04/1	18/04/19 - 01/05/1	02/05/19 - 15/05/1	16/05/19 - 29/05/1	30/05/19 - 12/06/1	13/06/19 - 26/06/1	27/06/19 - 10/07/1
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, Accesibility & 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 Accesibility Testing)

Updates made: Development Lane & Assurance Events

Thank you

Risk and Issues

[redacted]

Number	Description	Mitigation	Owner	Status
1	Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act. There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.	1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard 2 - Store data in an easily accessible format 3 - Be as transparent as possible e.g. UAT in GitHub	[redacted]	Closed
2	Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance	**Escalated to project risk register (Risk and Issues bi-weekly call)** 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.	[redacted]	Closed
3	Deskpro secure email is currently unsupported on a day to day basis	**Escalated to project risk register (Risk and Issues bi-weekly call)** Customer Service Group have agreed to support the deskpro service.	[redacted]	Closed
4	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. **See Assumption No. 2**	**Escalated to project risk register (Risk and Issues bi-weekly call)**	[redacted]	Closed
5	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.	This is mitigated by using a common style guide and [redacted] kindly offered to talk if we had any major concerns. Content designer allocated. We have access to Gov.uk content via Sharepoint. **Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)**	[redacted]	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

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

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 - 06/03/1	07/03/19 - 20/03/1	21/03/19 - 03/04/1	04/04/19 - 17/04/1	18/04/19 - 01/05/1	02/05/19 - 15/05/1	16/05/19 - 29/05/1	30/05/19 - 12/06/1	13/06/19 - 26/06/1	27/06/19 - 10/07/1
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, Accesibility & 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 Accesibility Testing)

Last updates made: Development Lane & Assurance Events

Thank you

Risk and Issues

[redacted]

Number	Description	Mitigation	Owner	Status
1	Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act. There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.	1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard 2 - Store data in an easily accessible format 3 - Be as transparent as possible e.g. UAT in GitHub	[redacted]	Closed
2	Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance	**Escalated to project risk register (Risk and Issues bi-weekly call)** 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.	[redacted]	Closed
3	Deskpro secure email is currently unsupported on a day to day basis	**Escalated to project risk register (Risk and Issues bi-weekly call)** Customer Service Group have agreed to support the deskpro service.	[redacted]	Closed
4	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. **See Assumption No. 2**	**Escalated to project risk register (Risk and Issues bi-weekly call)**	[redacted]	Closed
5	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.	This is mitigated by using a common style guide and [redacted] kindly offered to talk if we had any major concerns. Content designer allocated. We have access to Gov.uk content via Sharepoint. **Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)**	[redacted]	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 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

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

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 - 06/03/1	07/03/19 - 20/03/1	21/03/19 - 03/04/1	04/04/19 - 17/04/1	18/04/19 - 01/05/1	02/05/19 - 15/05/1	16/05/19 - 29/05/1	30/05/19 - 12/06/1	13/06/19 - 26/06/1	27/06/19 - 10/07/1
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, Accesibility & 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 Accesibility Testing)

Last updates made: Development Lane & Assurance Events

Thank you

Risk and Issues

[redacted]

Number	Description	Mitigation	Owner	Status
1	Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act. There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.	1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard 2 - Store data in an easily accessible format 3 - Be as transparent as possible e.g. UAT in GitHub	[redacted]	Closed
2	Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance	**Escalated to project risk register (Risk and Issues bi-weekly call)** 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.	[redacted]	Closed
3	Deskpro secure email is currently unsupported on a day to day basis	**Escalated to project risk register (Risk and Issues bi-weekly call)** Customer Service Group have agreed to support the deskpro service.	[redacted]	Closed
4	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. **See Assumption No. 2**	**Escalated to project risk register (Risk and Issues bi-weekly call)**	[redacted]	Closed
5	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.	This is mitigated by using a common style guide and [redacted] kindly offered to talk if we had any major concerns. Content designer allocated. We have access to Gov.uk content via Sharepoint. **Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)**	[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

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

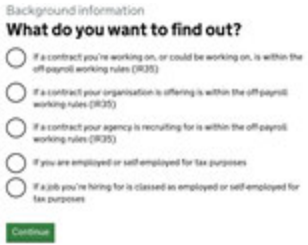
- Capability to add to and adjust the Decision Service - easier to enhance in the future
- Make the decision service easier to support in live (reduction in resource and time)
- Reduction in running costs (instances reduced and memory usage)
- More performant
- Easier for third party developers to understand

Done during this sprint

Design

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

SET UP

CURRENT	HIRER	WORKER
	**Who are you?** O Worker O Hirer O Agency	**Who are you?** O Worker O Hirer O Agency
	What do you want to find out about this work? O If it falls within the off-payroll working rules (IR35) O If it should be classed as employed or self-employed for tax purposes	**What are you trying to find out about your work?** O If it falls within the off-payroll working rules (IR35) O If you should be classed as employed or self-employed for tax purposes

SET UP

CURRENT	HIRER	WORKER
	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. O Yes O No	**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. O Yes O No

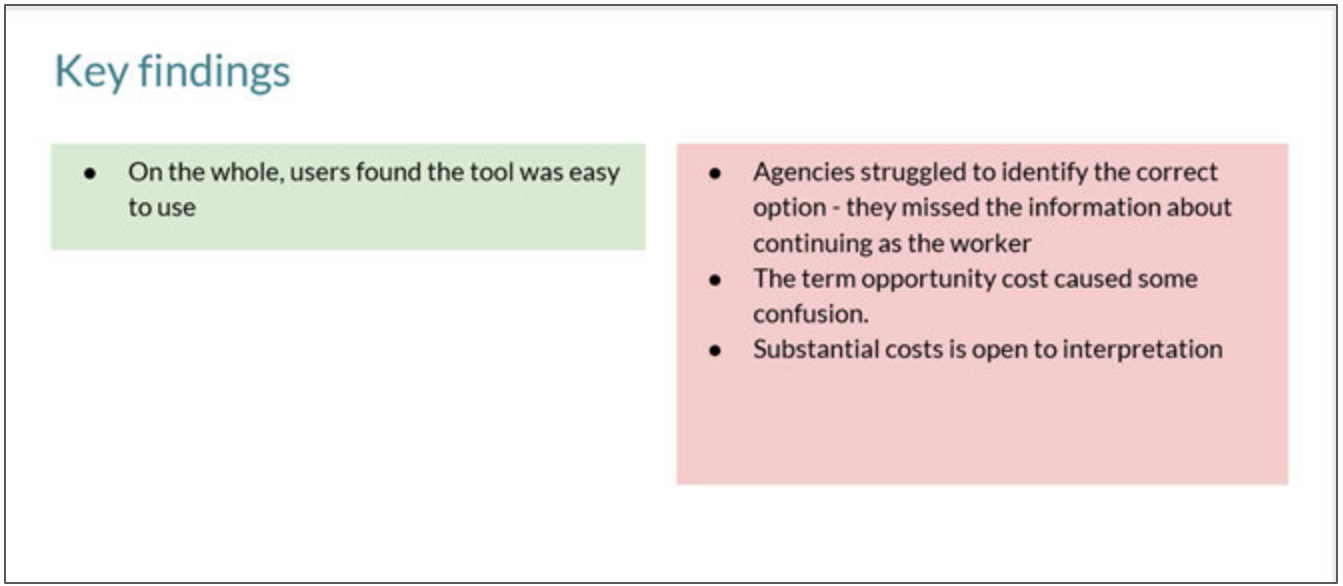
WORKERS DUTIES

CURRENT	HIRER	WORKER
	Will the worker be in an 'Office Holder' position? This can include a board member, treasurer, trustee, company secretary, or company director. O Yes O No Read more about Office Holders.	**Will you work in an 'Office Holder' position?** This can include a board member, treasurer, trustee, company secretary, or company director. O Yes O No Read more about Office Holders.

Done during this sprint

Research

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



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 - 12/06/1	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, Accesibility & 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 micros-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

[redacted]

Number	Description	Mitigation	Owner	Status
1	Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act. There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.	1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard 2 - Store data in an easily accessible format 3 - Be as transparent as possible e.g. UAT in GitHub	[redacted]	Closed
2	Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance	**Escalated to project risk register (Risk and Issues bi-weekly call)** 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.	[redacted]	Closed
3	Deskpro secure email is currently unsupported on a day to day basis	**Escalated to project risk register (Risk and Issues bi-weekly call)** Customer Service Group have agreed to support the deskpro service.	[redacted]	Closed
4	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. **See Assumption No. 2**	**Escalated to project risk register (Risk and Issues bi-weekly call)**	[redacted]	Closed
5	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.	This is mitigated by using a common style guide and [redacted] kindly offered to talk if we had any major concerns. Content designer allocated. We have access to Gov.uk content via Sharepoint. **Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)**	[redacted]	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

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 ✓

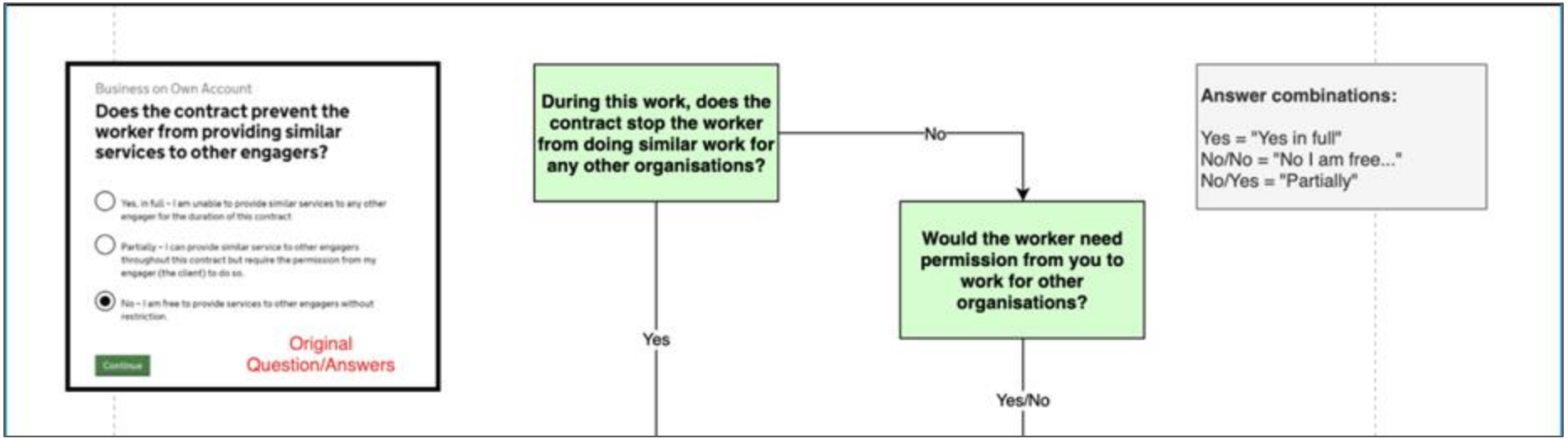
Vision for Decision Service Refactoring

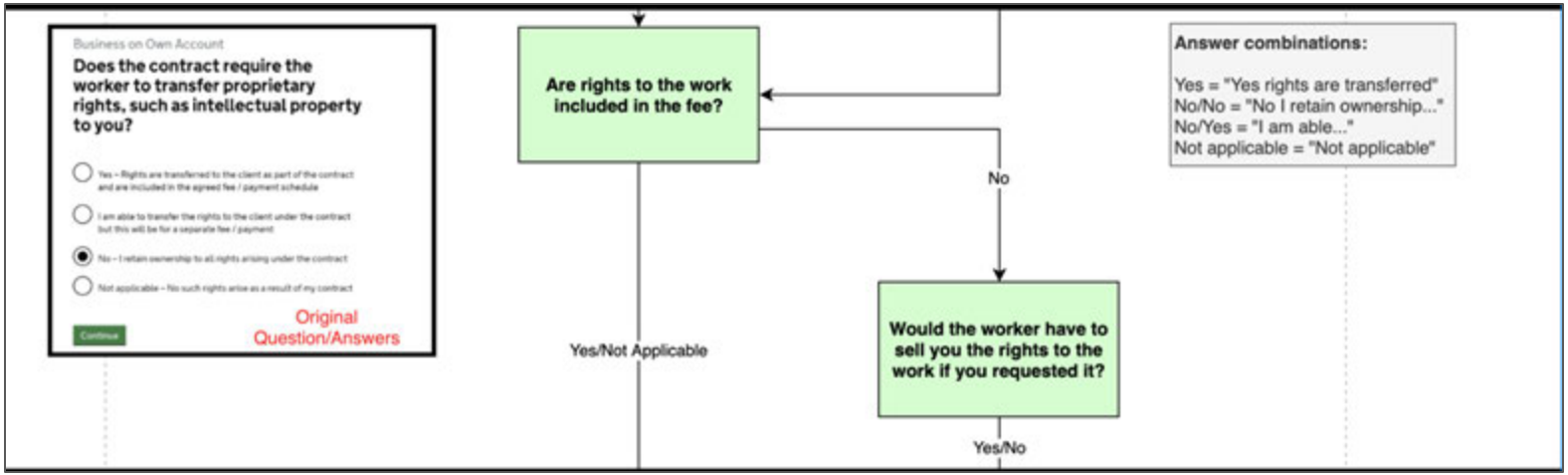
- Capability to add to and adjust the Decision Service - easier to enhance in the future
- Make the decision service easier to support in live (reduction in resource and time)
- Reduction in running costs (instances reduced and memory usage)
- More performant
- Easier for third party developers to understand

Done during this sprint

Design

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

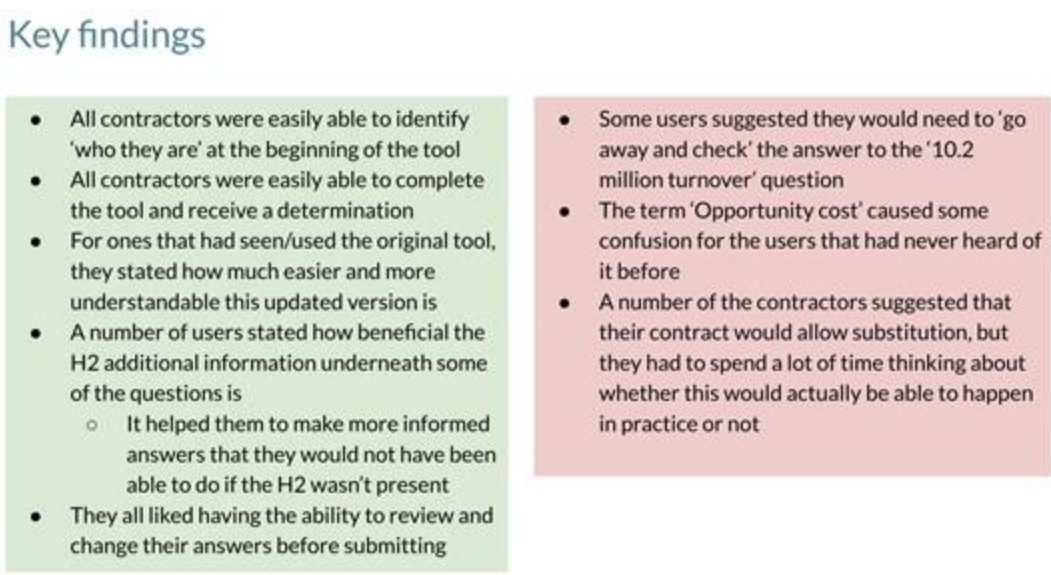

Business on Own Account
Does the contract prevent the worker from providing similar services to other engagers?
Yes, in full – I am unable to provide similar services to any other engager for the duration of this contract
Partially – I can provide similar service to other engagers throughout this contract 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?
No
Yes
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?
No
Yes/Not Applicable
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



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 - 12/06/1	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, Accesibility & Design					Research, Accesibility & 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 micros-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 Research, Accessibility & Design review in August

Thank you

Useful Links:

Analytics

Username:

Password:

Risk and Issues

[redacted]

Number	Description	Mitigation	Owner	Status
1	Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act. There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.	1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard 2 - Store data in an easily accessible format 3 - Be as transparent as possible e.g. UAT in GitHub	[redacted]	Closed
2	Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance	**Escalated to project risk register (Risk and Issues bi-weekly call)** 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.	[redacted]	Closed
3	Deskpro secure email is currently unsupported on a day to day basis	**Escalated to project risk register (Risk and Issues bi-weekly call)** Customer Service Group have agreed to support the deskpro service.	[redacted]	Closed
4	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. **See Assumption No. 2**	**Escalated to project risk register (Risk and Issues bi-weekly call)**	[redacted]	Closed
5	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.	This is mitigated by using a common style guide and [redacted] kindly offered to talk if we had any major concerns. Content designer allocated. We have access to Gov.uk content via Sharepoint. **Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)**	[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

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 - 12/06/1	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, Accesibility & Design					Research, Accesibility & 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 micros-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 Research, Accessibility & Design review in August

Thank you

Useful Links:

Analytics

Username:

Password:

Risk and Issues

[redacted]

Number	Description	Mitigation	Owner	Status
1	Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act. There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.	1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard 2 - Store data in an easily accessible format 3 - Be as transparent as possible e.g. UAT in GitHub	[redacted]	Closed
2	Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance	**Escalated to project risk register (Risk and Issues bi-weekly call)** 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.	[redacted]	Closed
3	Deskpro secure email is currently unsupported on a day to day basis	**Escalated to project risk register (Risk and Issues bi-weekly call)** Customer Service Group have agreed to support the deskpro service.	[redacted]	Closed
4	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. **See Assumption No. 2**	**Escalated to project risk register (Risk and Issues bi-weekly call)**	[redacted]	Closed
5	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.	This is mitigated by using a common style guide and [redacted] kindly offered to talk if we had any major concerns. Content designer allocated. We have access to Gov.uk content via Sharepoint. **Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)**	[redacted]	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 [redacted] 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 - 12/06/1	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, Accesibility & Design					Research, Accesibility & 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 micros-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 Research, Accessibility & Design review in August

Thank you

Useful Links:

Analytics

Username:

Password:

Risk and Issues

[redacted]

Number	Description	Mitigation	Owner	Status
1	Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act. There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.	1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard 2 - Store data in an easily accessible format 3 - Be as transparent as possible e.g. UAT in GitHub	[redacted]	Closed
2	Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance	**Escalated to project risk register (Risk and Issues bi-weekly call)** 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.	[redacted]	Closed
3	Deskpro secure email is currently unsupported on a day to day basis	**Escalated to project risk register (Risk and Issues bi-weekly call)** Customer Service Group have agreed to support the deskpro service.	[redacted]	Closed
4	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. **See Assumption No. 2**	**Escalated to project risk register (Risk and Issues bi-weekly call)**	[redacted]	Closed
5	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.	This is mitigated by using a common style guide and [redacted] kindly offered to talk if we had any major concerns. Content designer allocated. We have access to Gov.uk content via Sharepoint. **Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)**	[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

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 - 12/06/1	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, Accesibility & Design					Research, Accesibility & 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 micros-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 Research, Accessibility & Design review in August

Thank you

Useful Links:

Analytics

Username:

Password:

Risk and Issues

[redacted]

Number	Description	Mitigation	Owner	Status
1	Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act. There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.	1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard 2 - Store data in an easily accessible format 3 - Be as transparent as possible e.g. UAT in GitHub	[redacted]	Closed
2	Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance	**Escalated to project risk register (Risk and Issues bi-weekly call)** 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.	[redacted]	Closed
3	Deskpro secure email is currently unsupported on a day to day basis	**Escalated to project risk register (Risk and Issues bi-weekly call)** Customer Service Group have agreed to support the deskpro service.	[redacted]	Closed
4	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. **See Assumption No. 2**	**Escalated to project risk register (Risk and Issues bi-weekly call)**	[redacted]	Closed
5	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.	This is mitigated by using a common style guide and [redacted] kindly offered to talk if we had any major concerns. Content designer allocated. We have access to Gov.uk content via Sharepoint. **Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)**	[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 e.g. lack of personalised tone You and Your And Them
- Complete refactoring

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

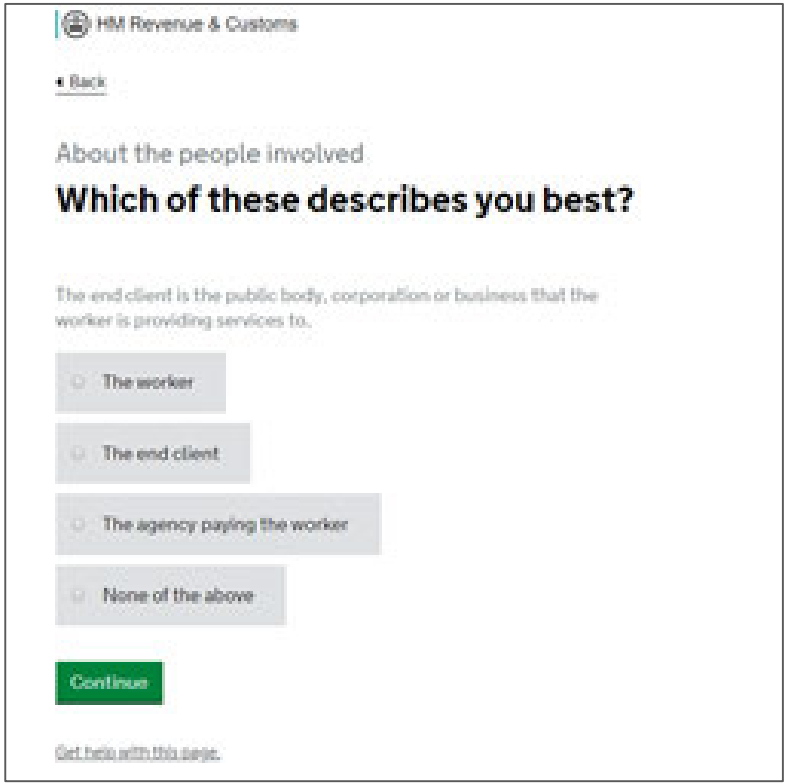
- Task driven entry points
- Tailored results page
- New content throughout

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)



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:

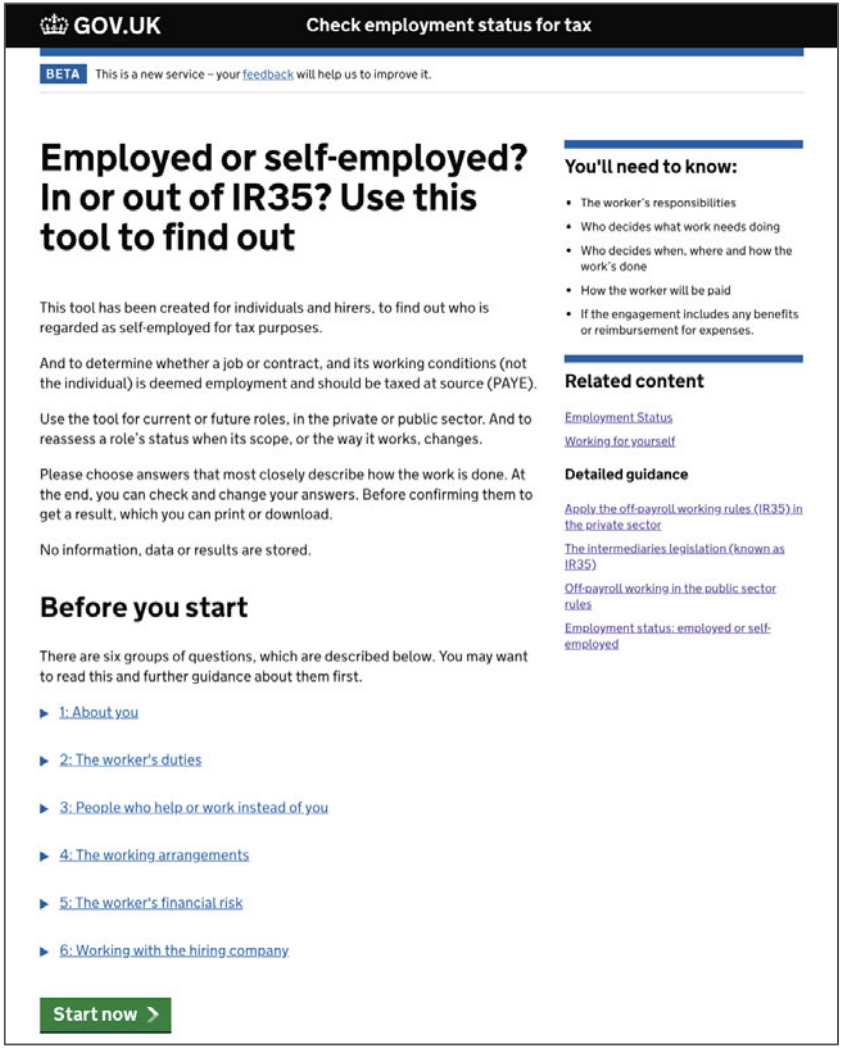
We intend to use the decision made by the user on this page to allow tailored content to be displayed.

- 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.

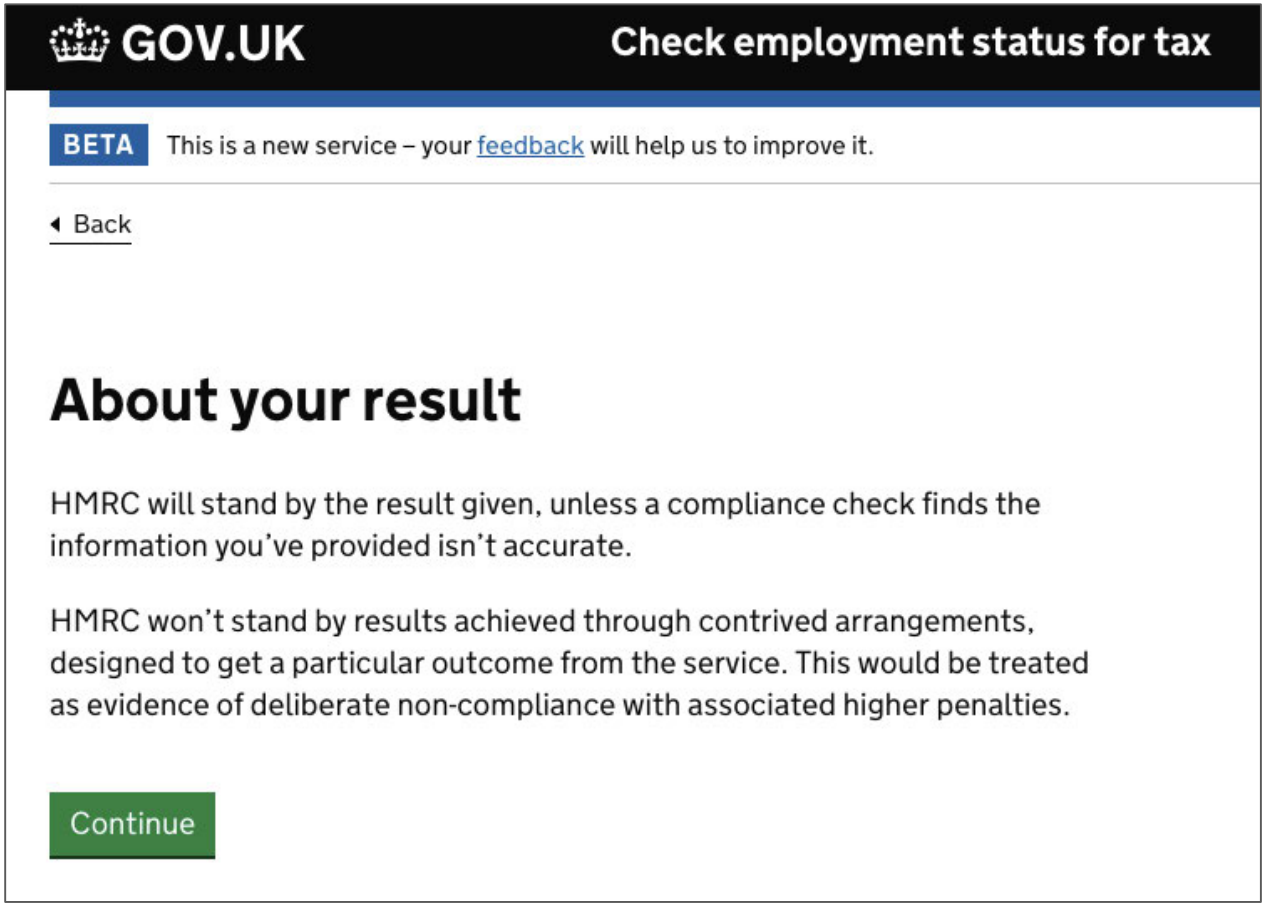
Optimised Content Screens

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

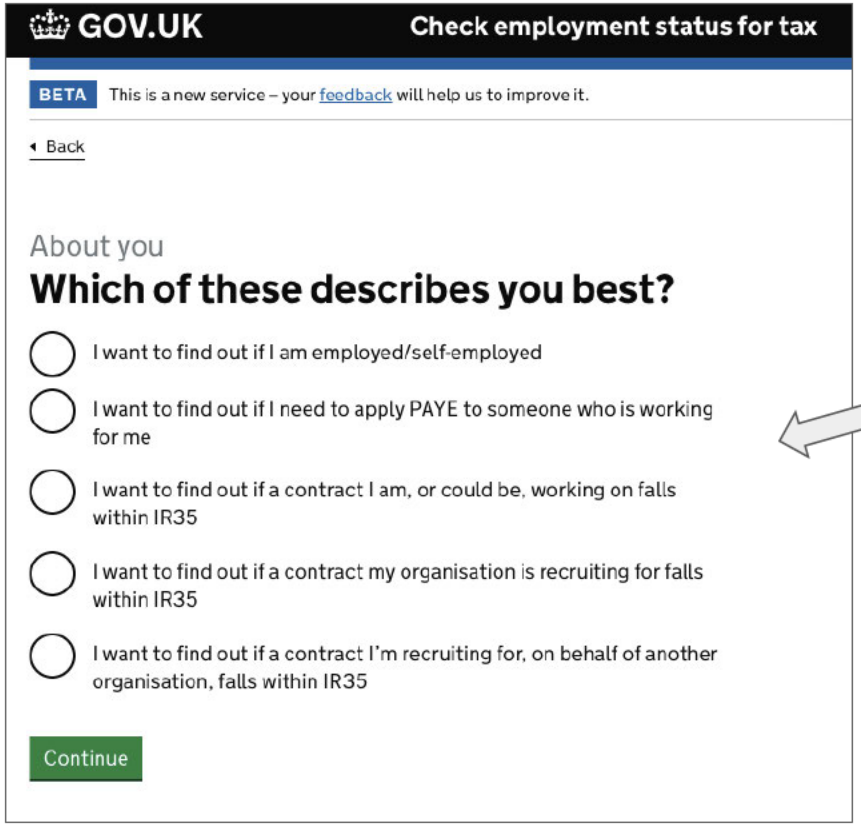


Proposed Guidance (Out of scope for scrum team)

About this result Task



User Task



/live_v2/describeYou2

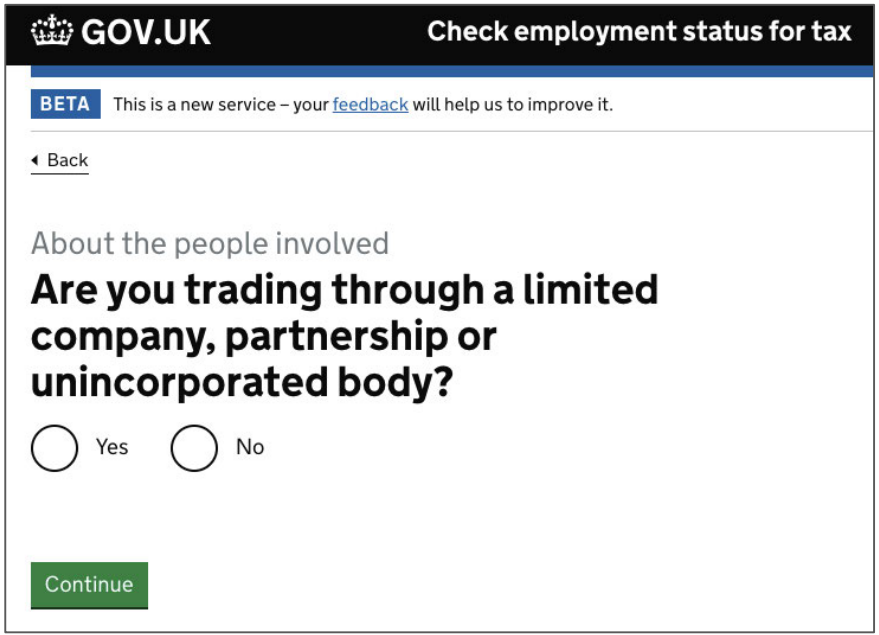
"Do I pay them PAYE" question rather than declaration

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"

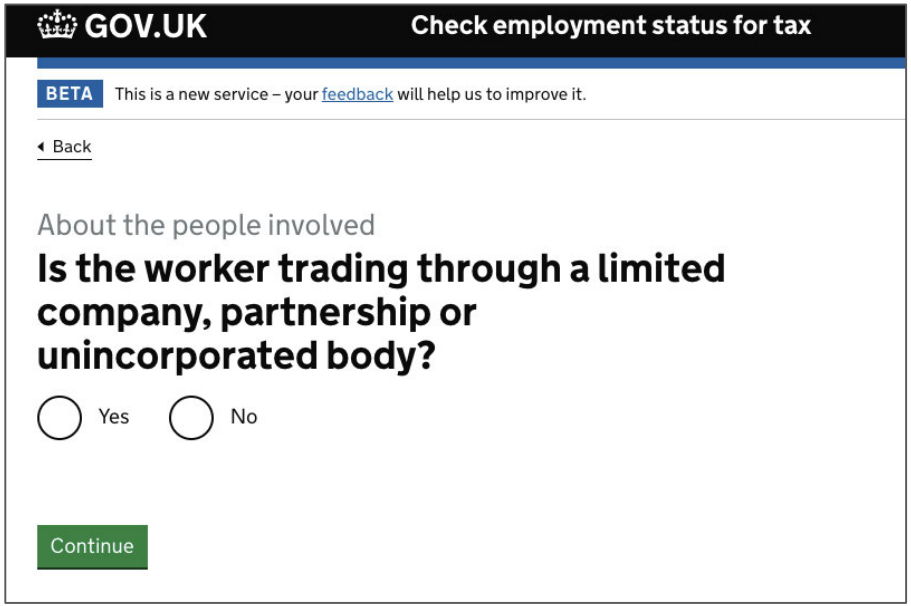
Intermediary

Worker



/live_v2/worker/intermediary

Hirer



/live_v2/hirer/intermediary

Sector

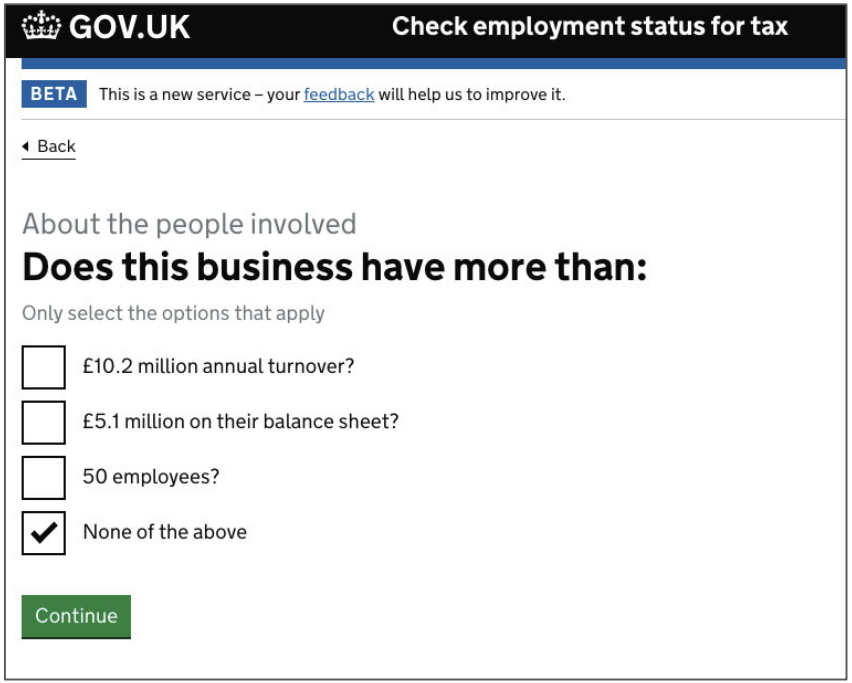
Same for worker and hirer

/live_v2/worker/sector

/live_v2/hirer/sector

Size

Same for worker and hirer



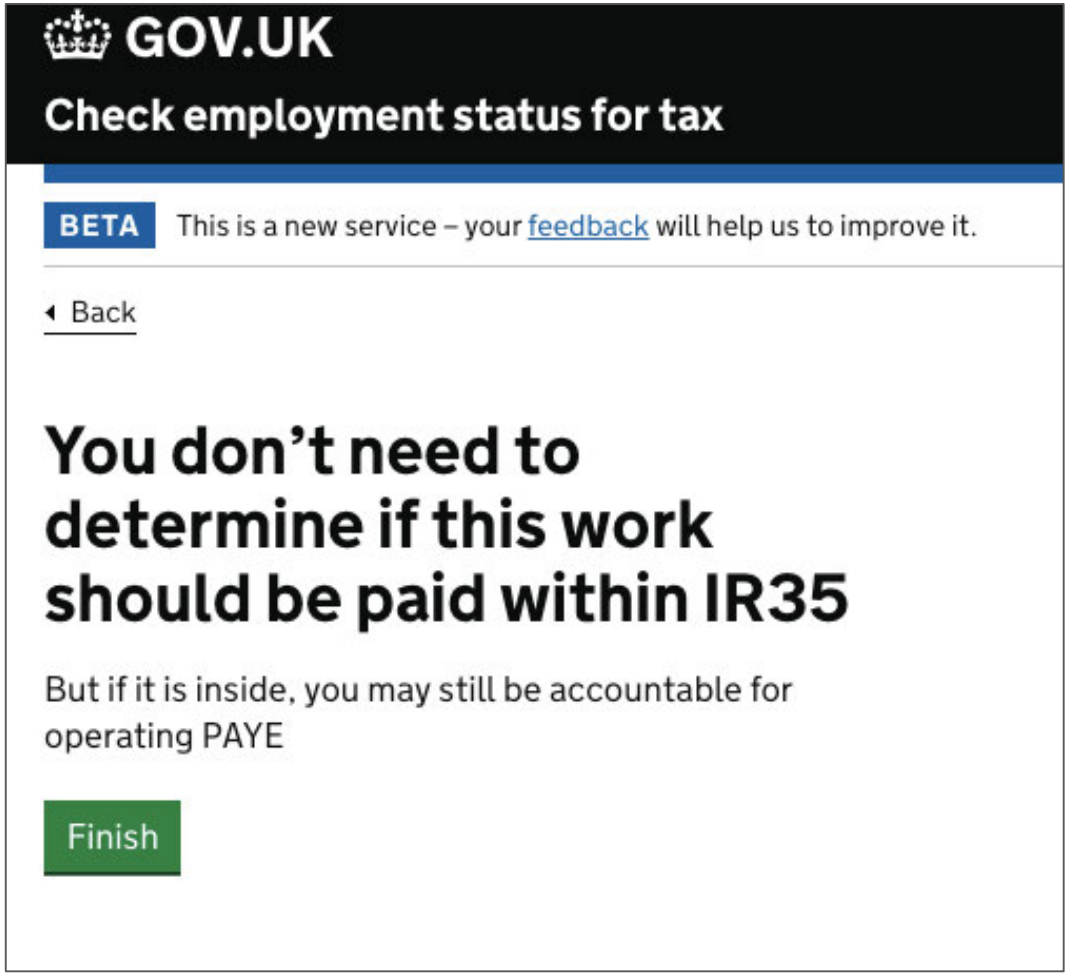
/live_v2/worker/smallBusiness

/live_v2/hirer/smallBusiness

Advisories and Exits

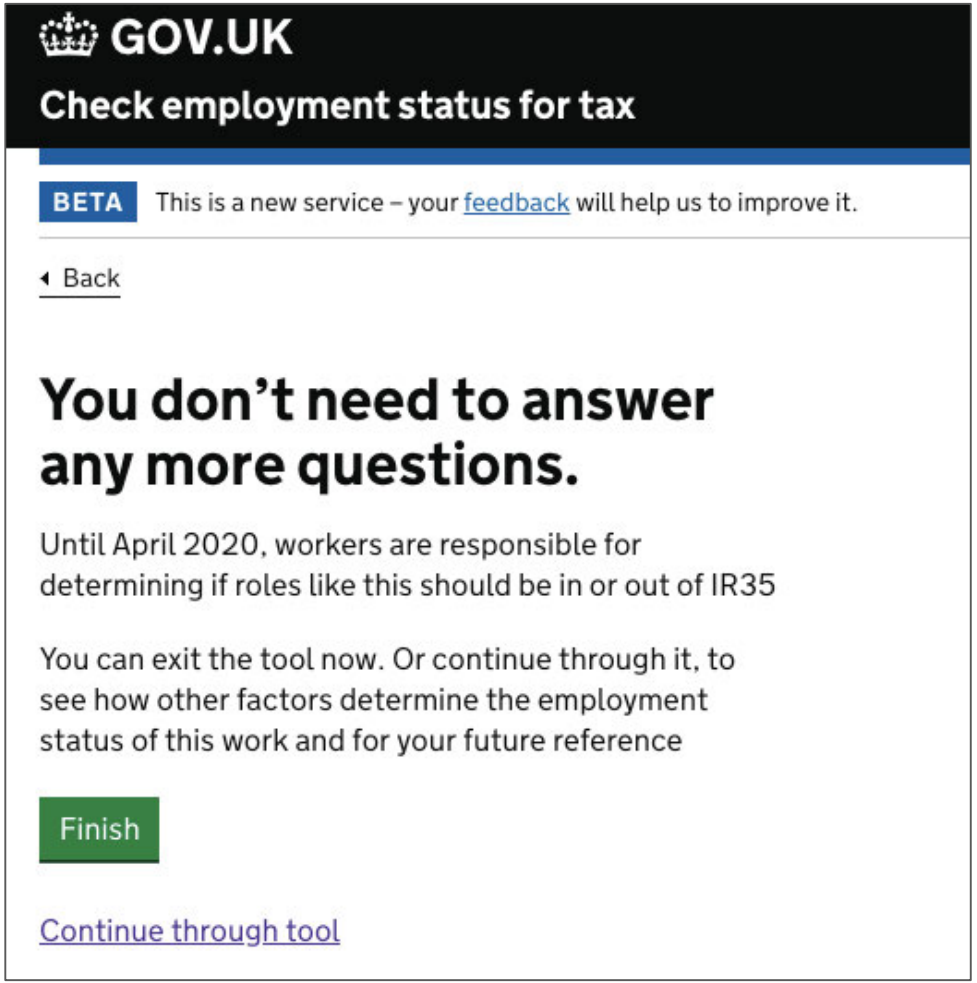
Agency Exit

Full stops in H2



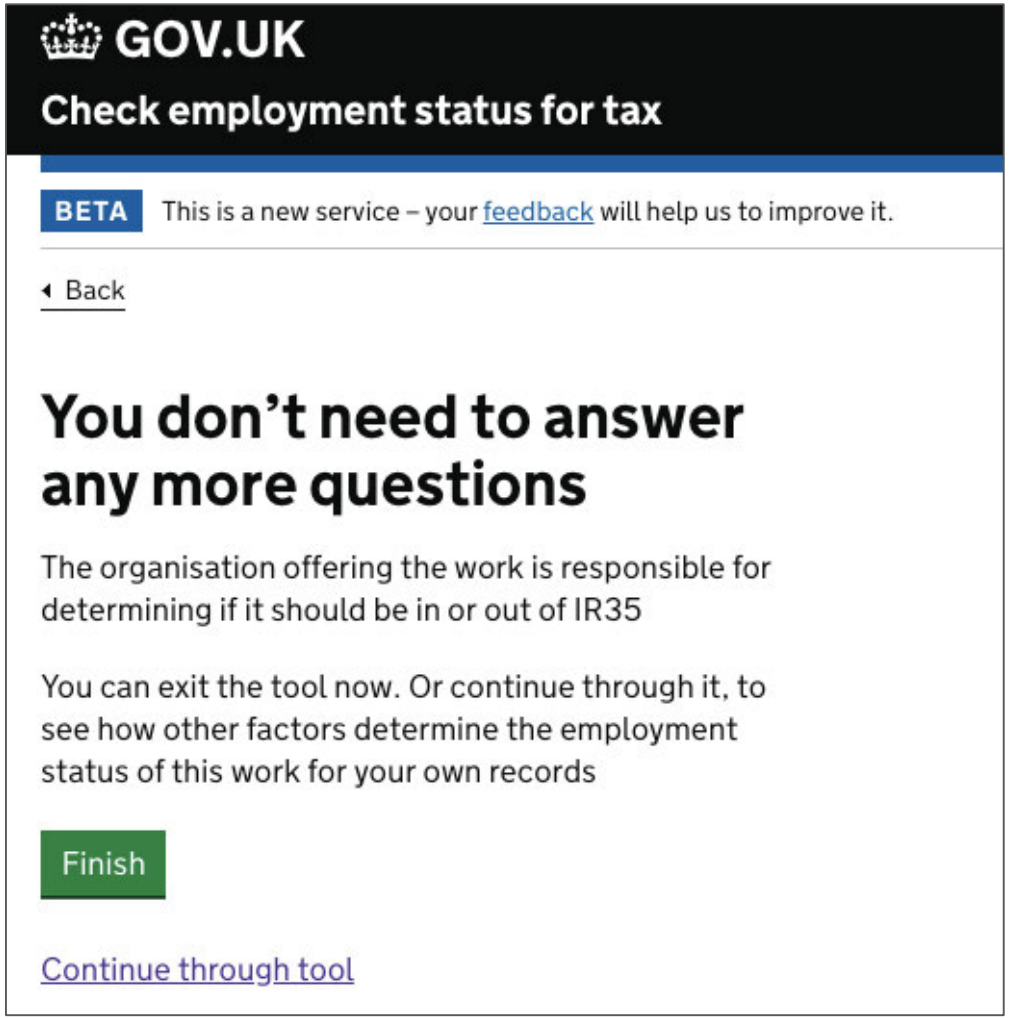
M/L Private Sector Business: Exit OR continue

FULL STOPS NEEDED IN H2



Public Sector Worker: Exit OR continue

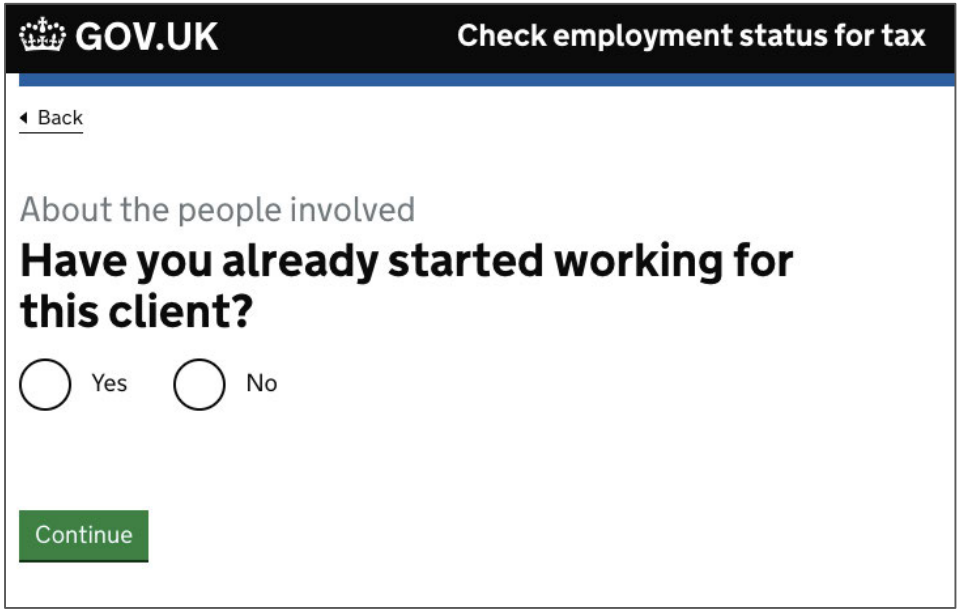
FULL STOPS NEEDED IN H2



Personal Service Section

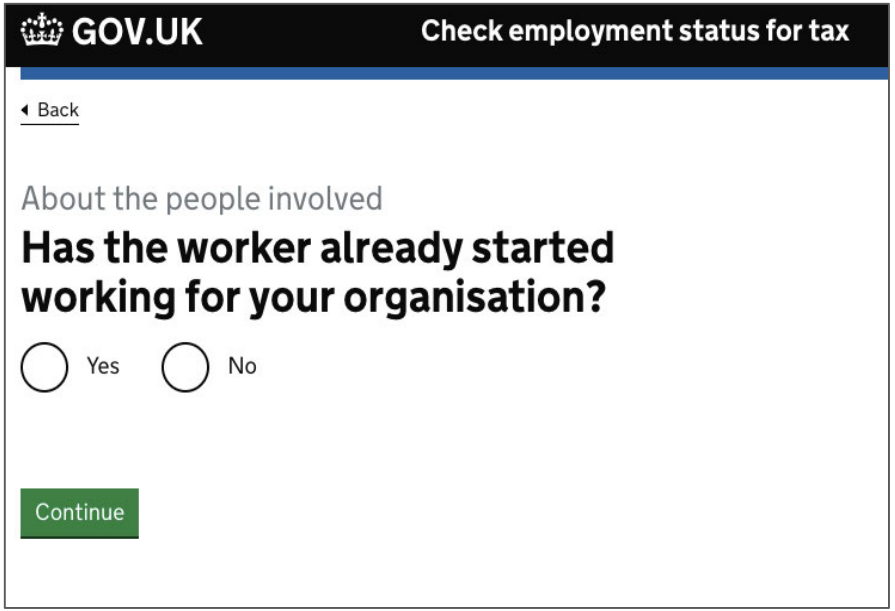
Engagement Started?

Worker



/live_v2/worker/contractStarted

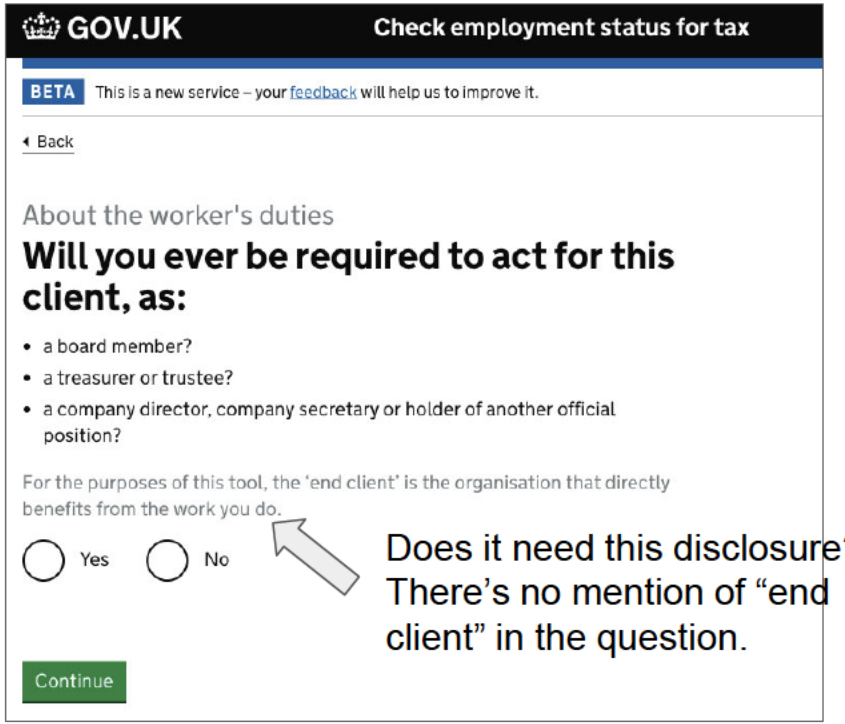
Hirer



/live_v2/hirer/contractStarted

Office Holder

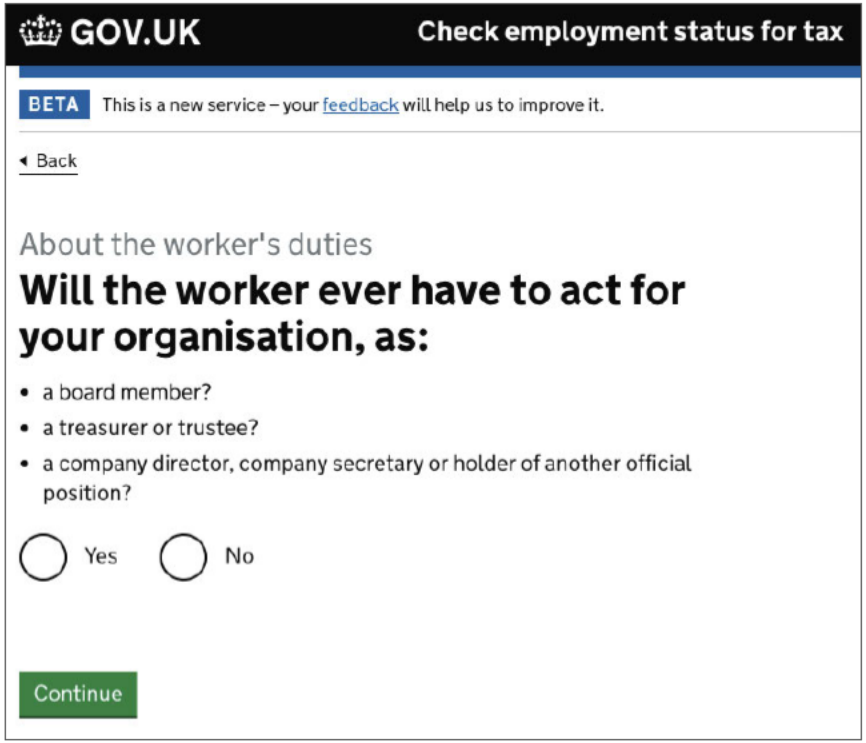
Worker



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

/live_v2/worker/officeHolder3

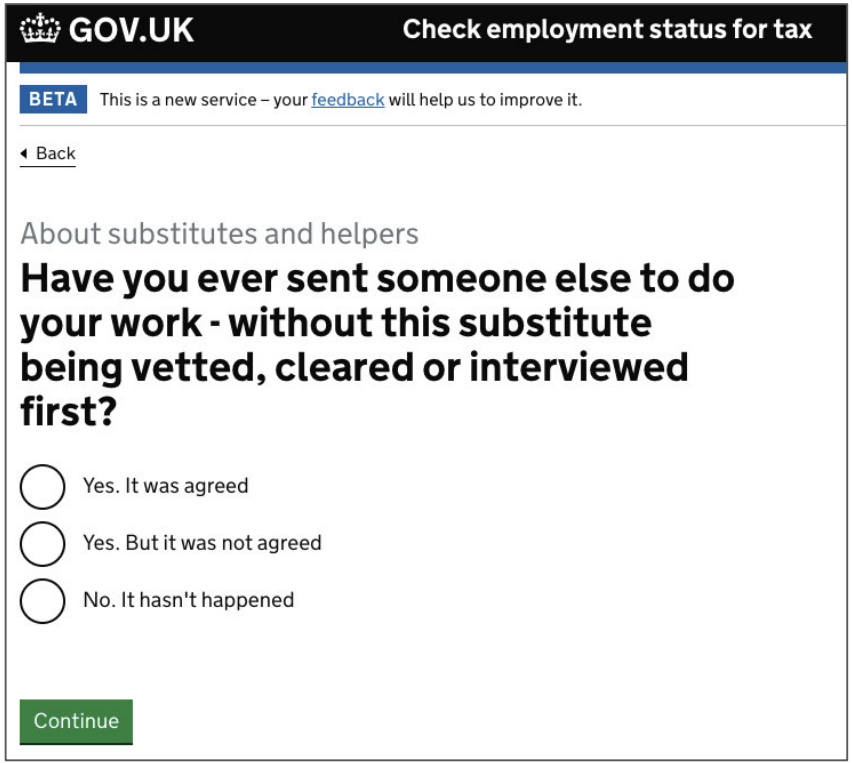
Hirer



/live_v2/hirer/officeHolder3

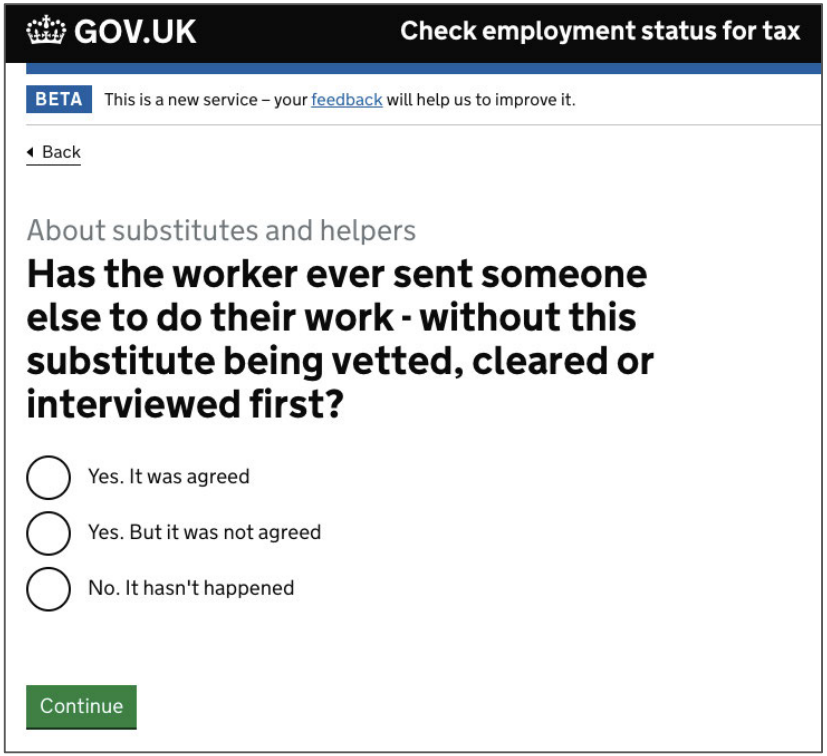
Substitute (Engagement Started)

Worker



/live_v2/worker/substitute

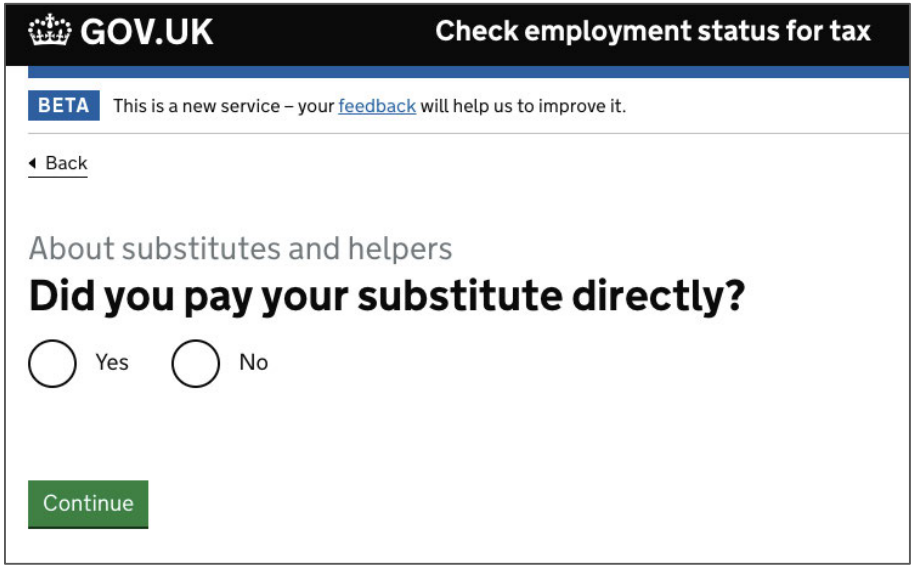
Hirer



/live_v2/hirer/substitute

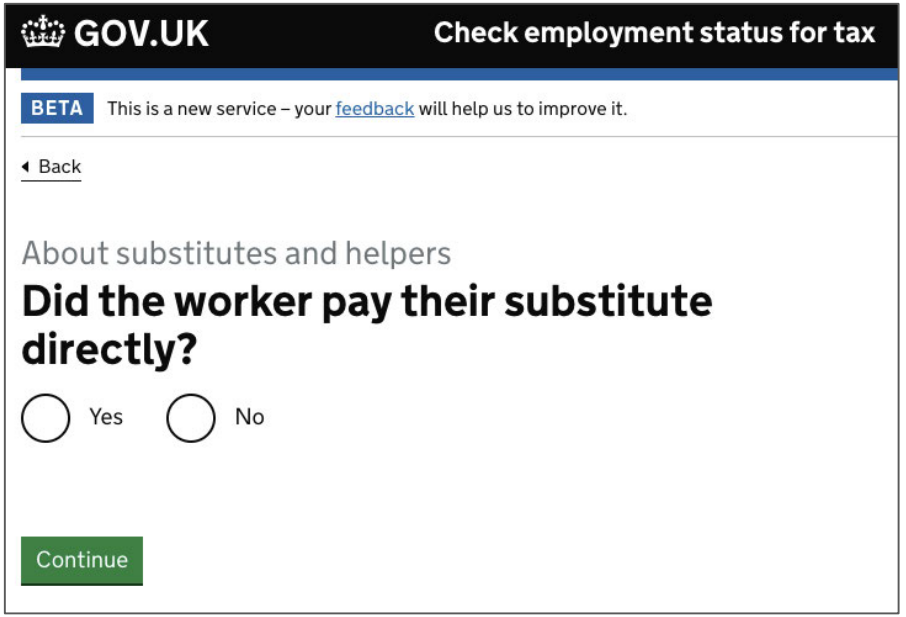
Substitute Paid? (Engagement Started)

Worker



/live_v2/worker/substitutePaid

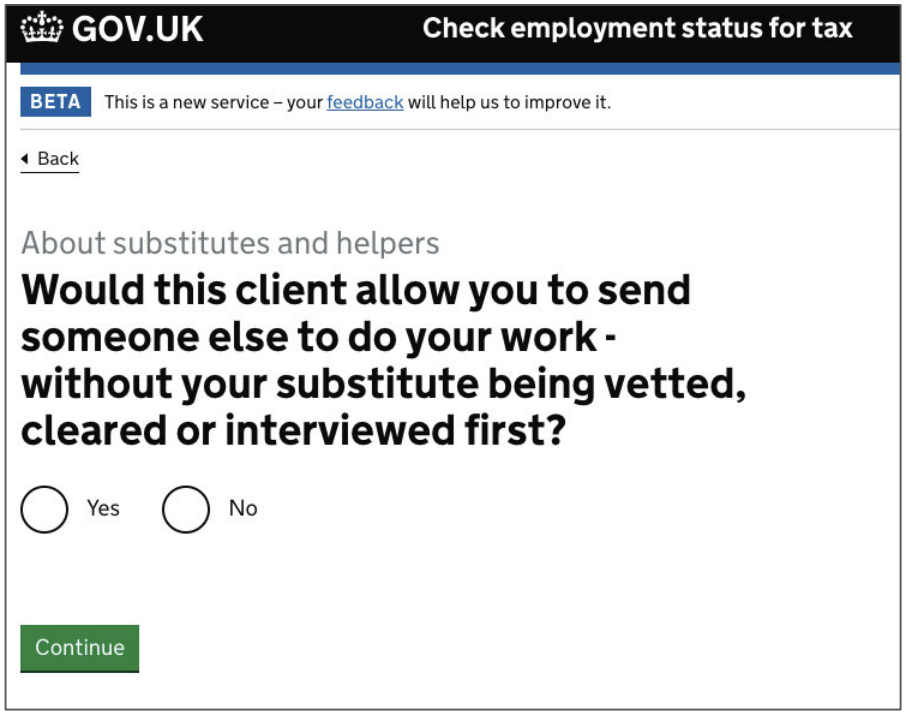
Hirer



/live_v2/hirer/substitutePaid

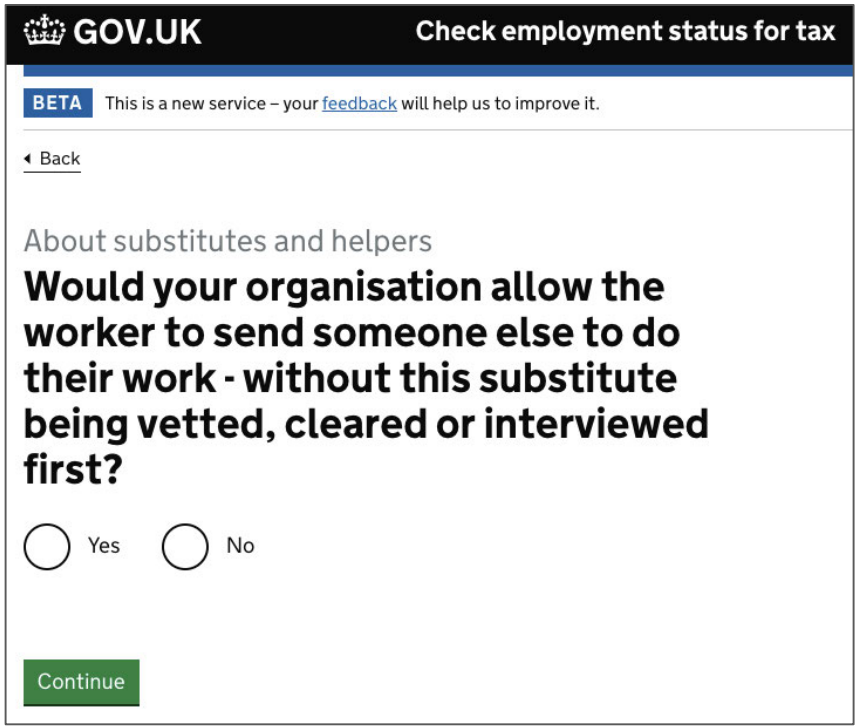
If Substitute (Engagement NOT Started)

Worker



/live_v2/worker/ifSubstitute

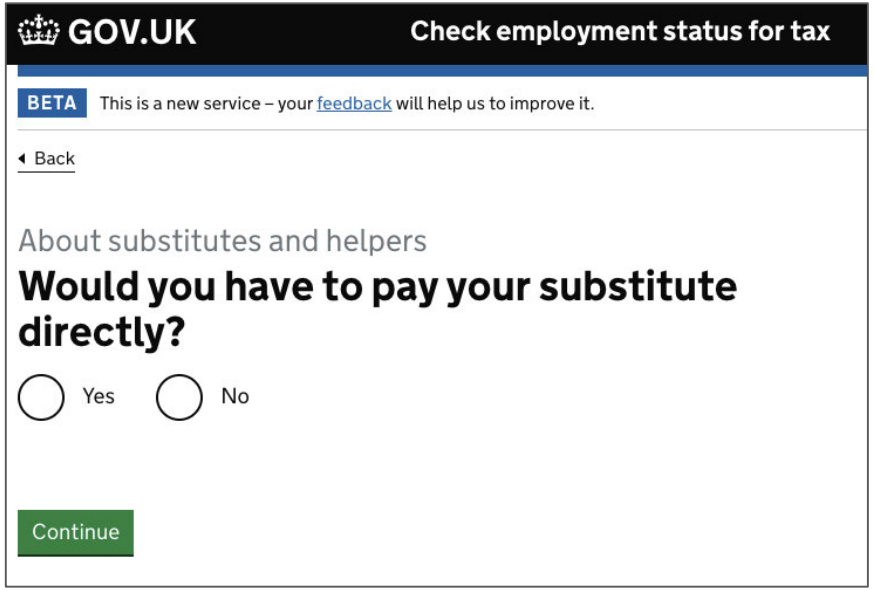
Hirer



/live_v2/hirer/ifSubstitute

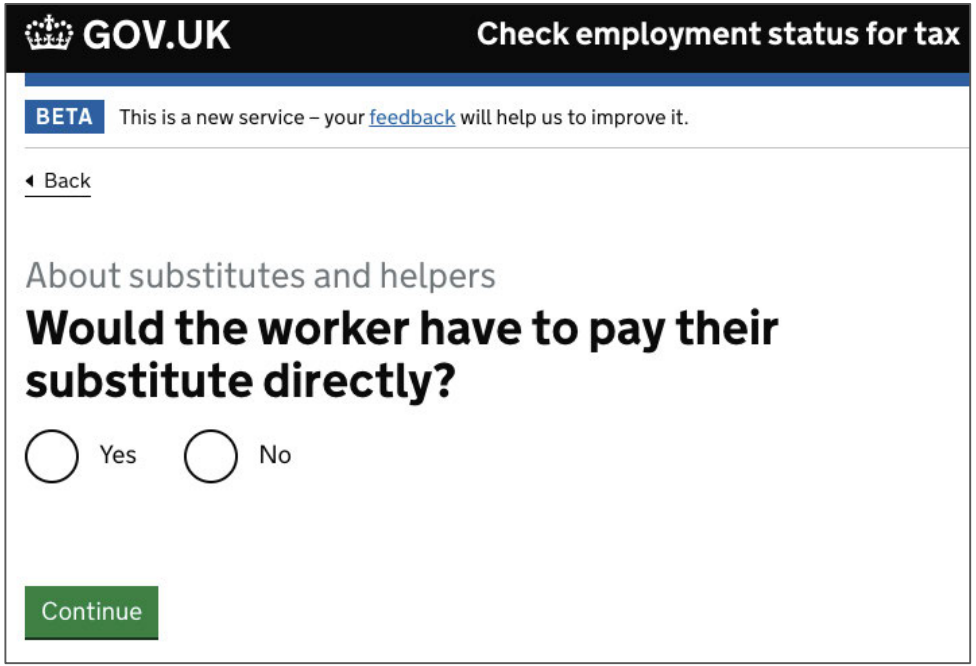
If Substitute Paid? (Engagement NOT Started)

Worker



/live_v2/worker/ifSubstitutePaid

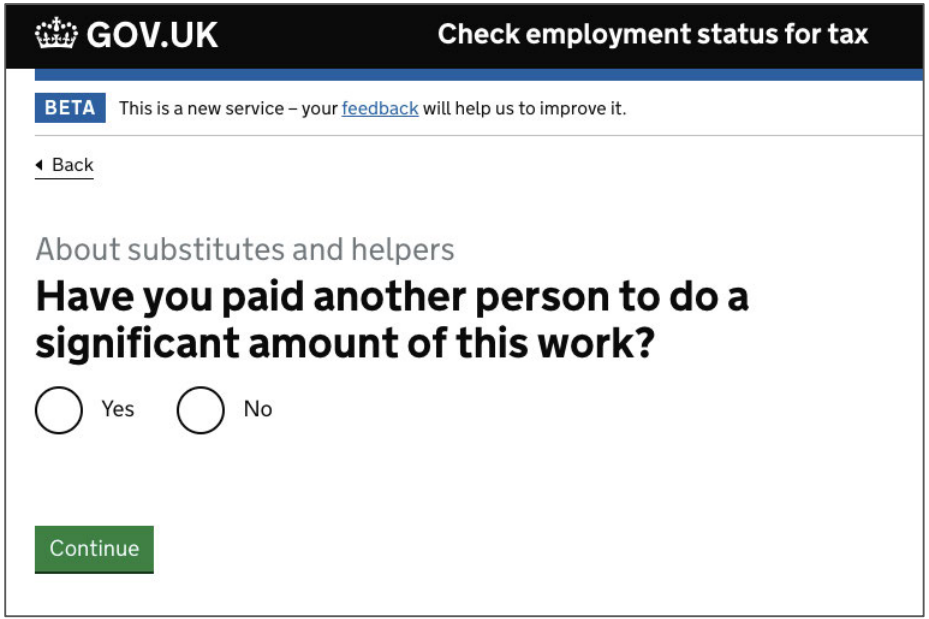
Hirer



/live_v2/hirer/ifSubstitutePaid

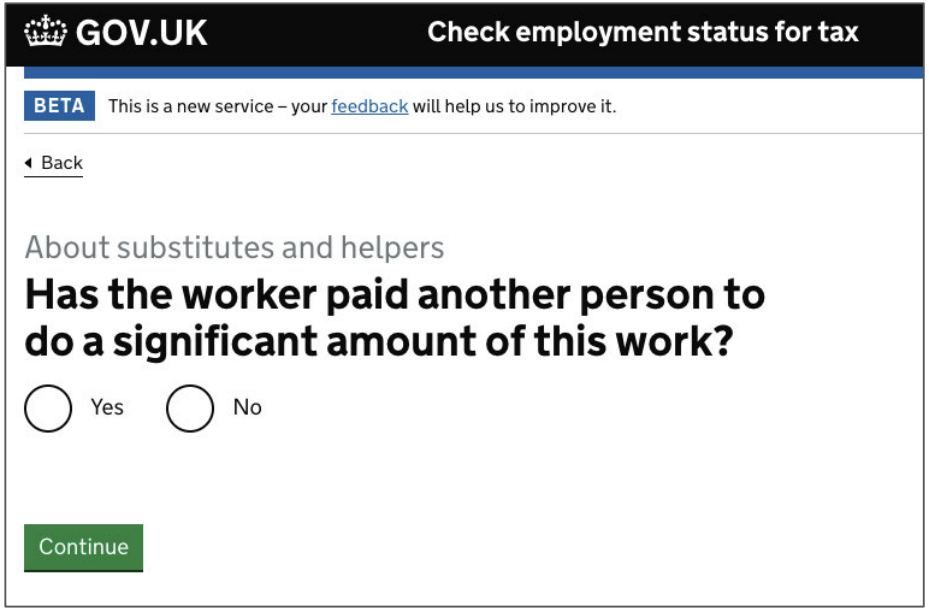
Helper

Worker



/live_v2/worker/helper

Hirer

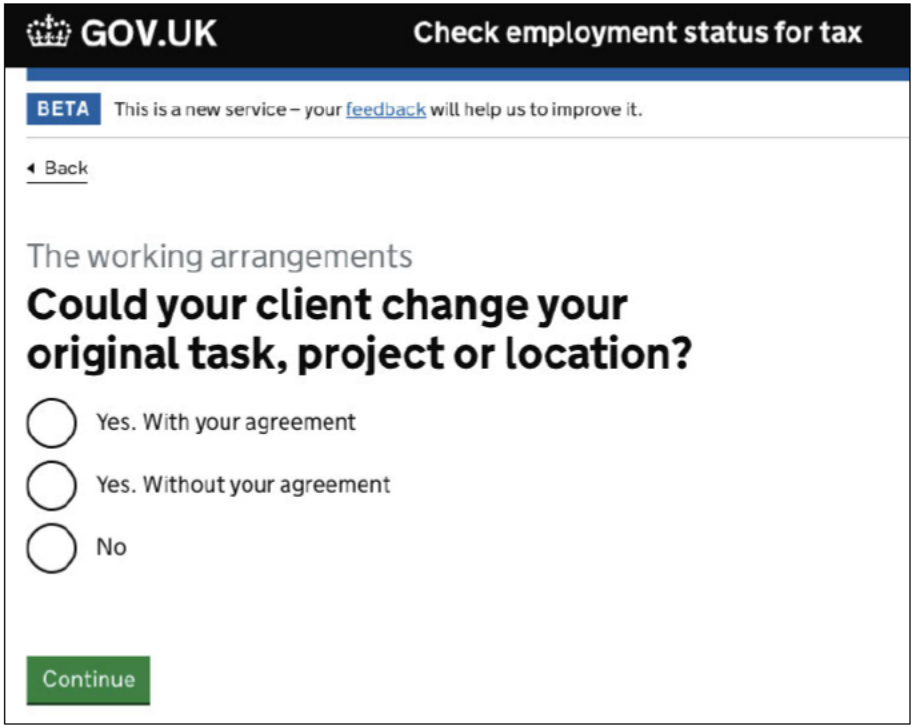


/live_v2/hirer/helper

Control Section

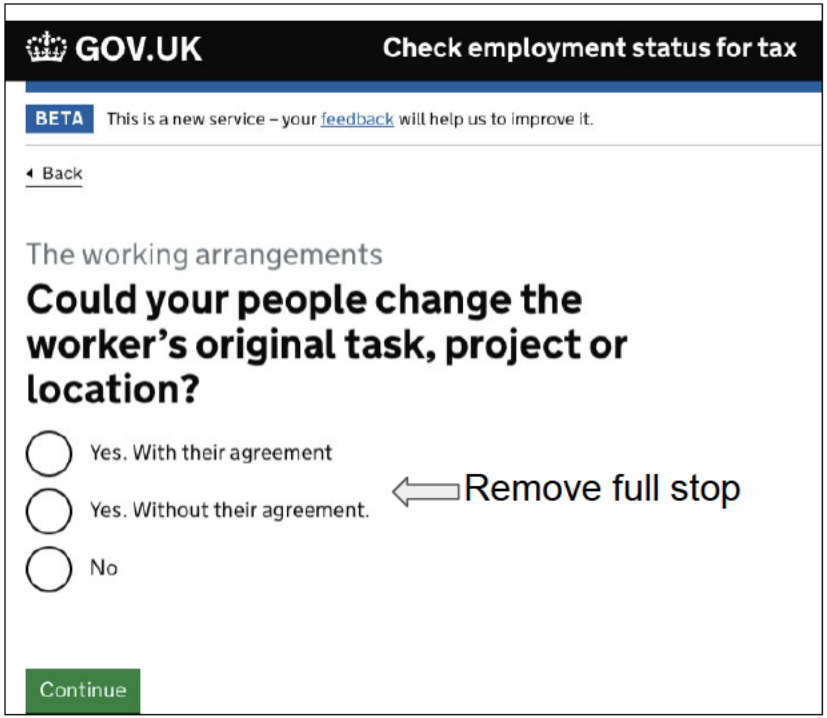
Control 1of4: Task

Worker



/live_v2/worker/controlTask

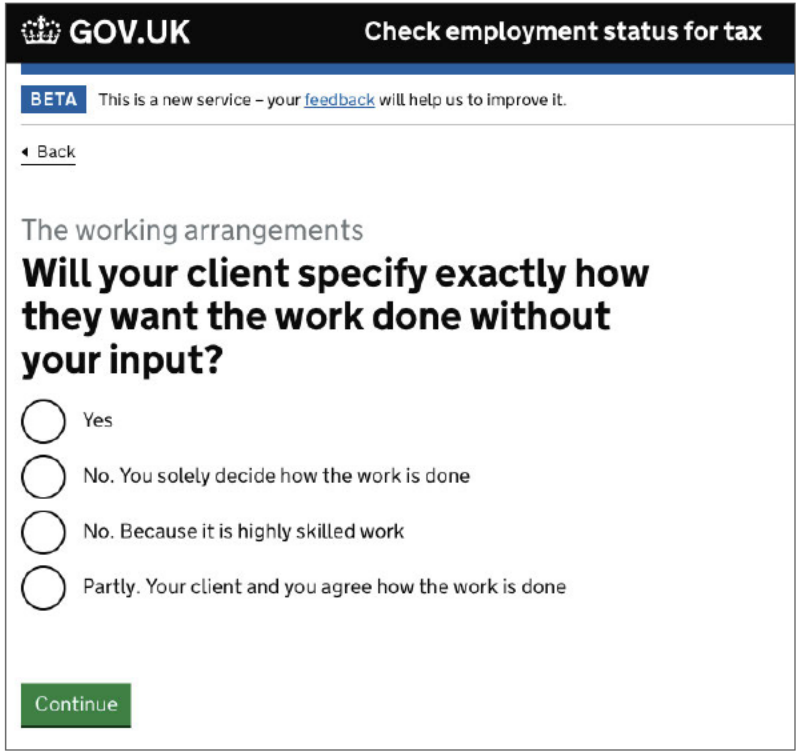
Hirer



/live_v2/hirer/controlTask

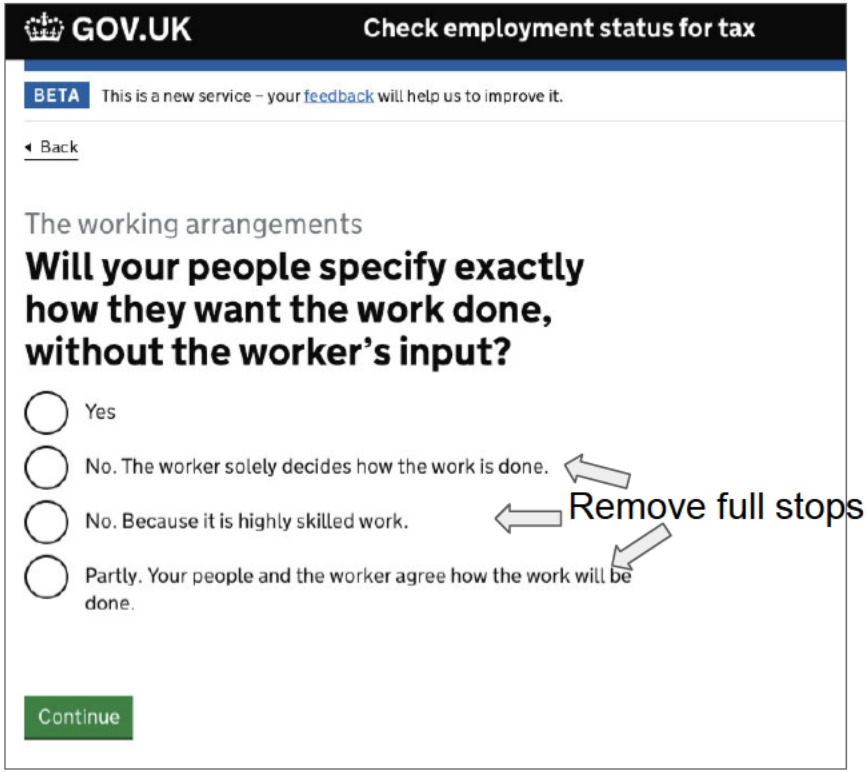
Control 2of4: How

Worker



/live_v2/worker/controlHow

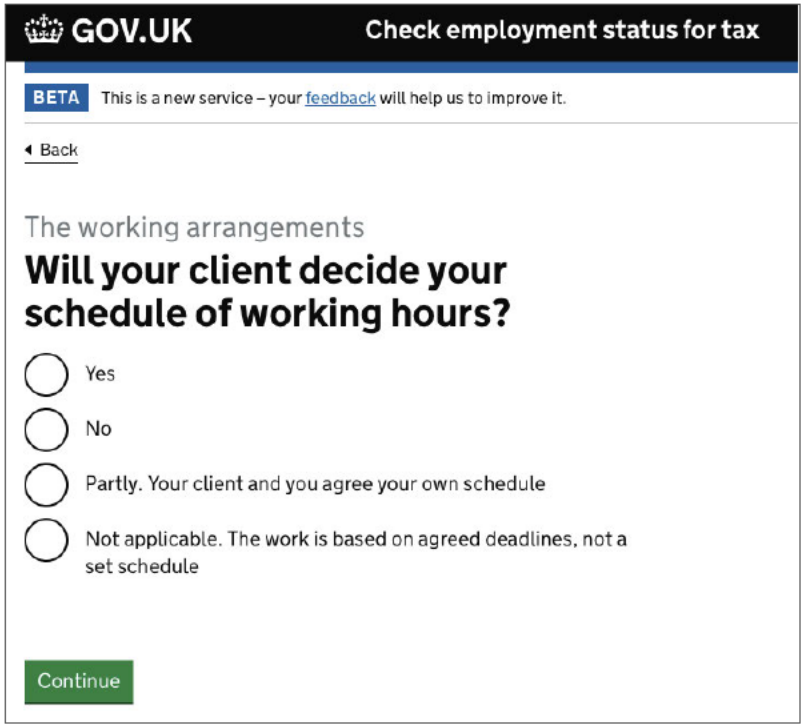
Hirer



/live_v2/hirer/controlHow

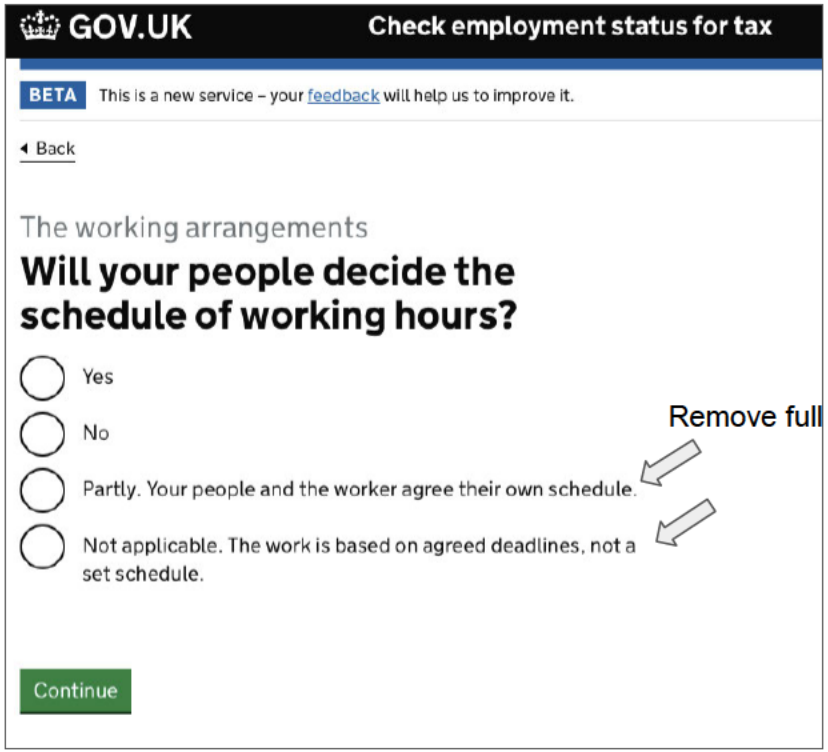
Control 3of4: When

Worker



/live_v2/worker/controlWhen

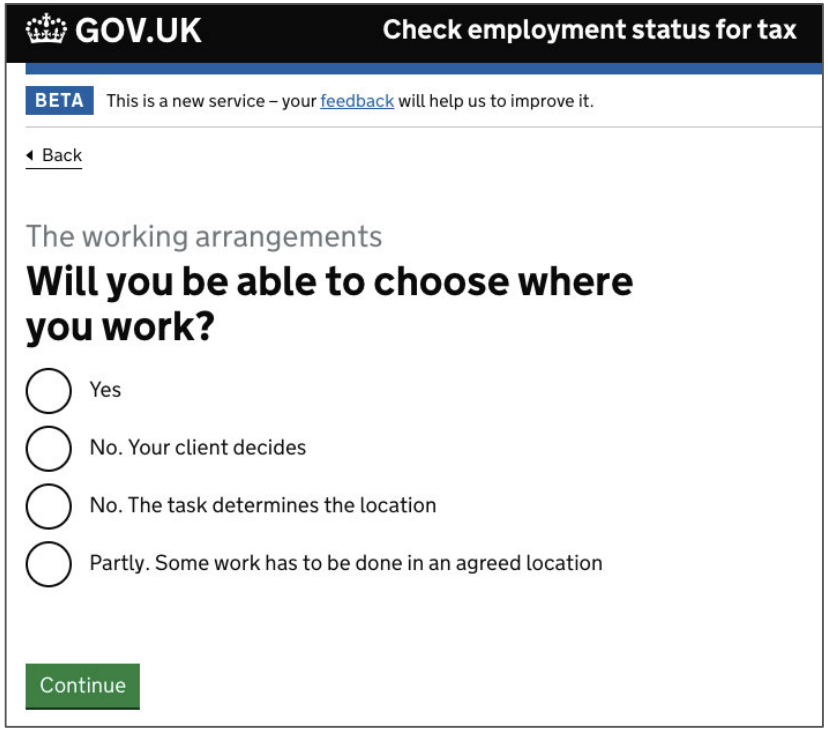
Hirer



/live_v2/hirer/controlWhen

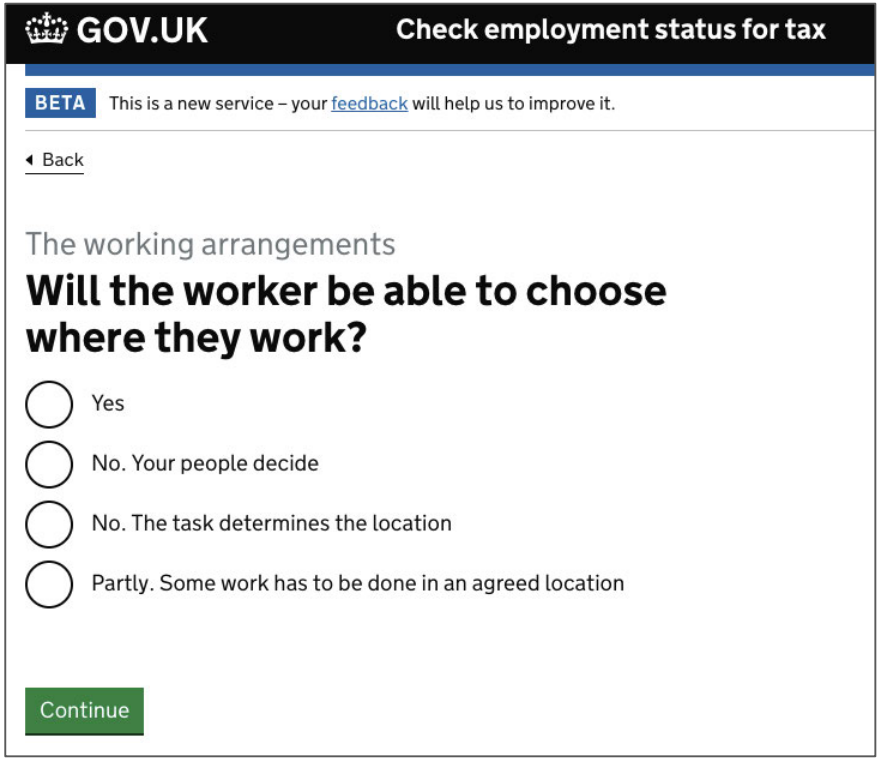
Control 4of4: Where

Worker



/live_v2/worker/controlWhere

Hirer

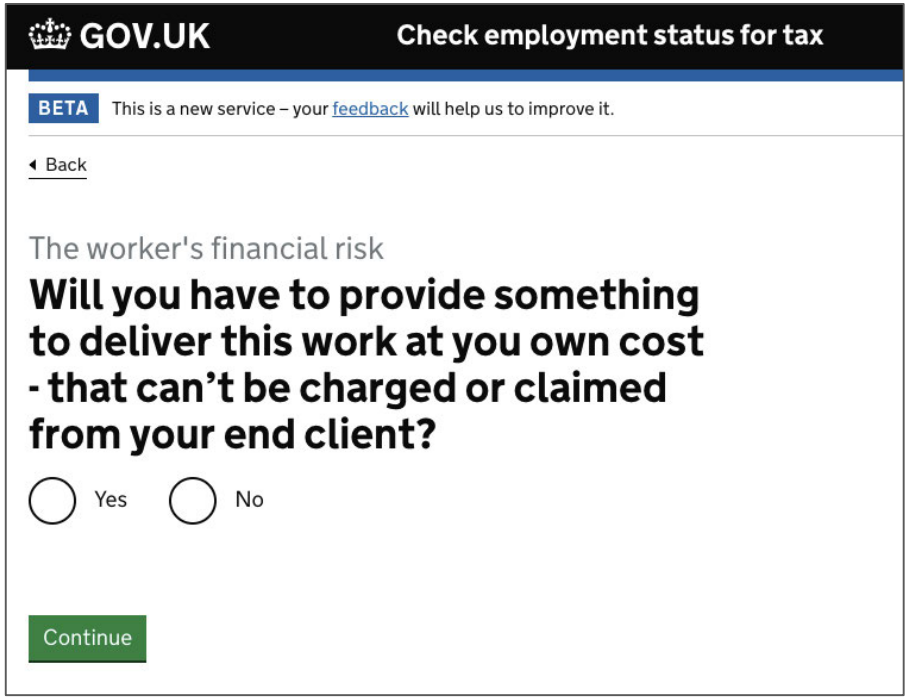


/live_v2/hirer/controlWhere

Financial Risk Section

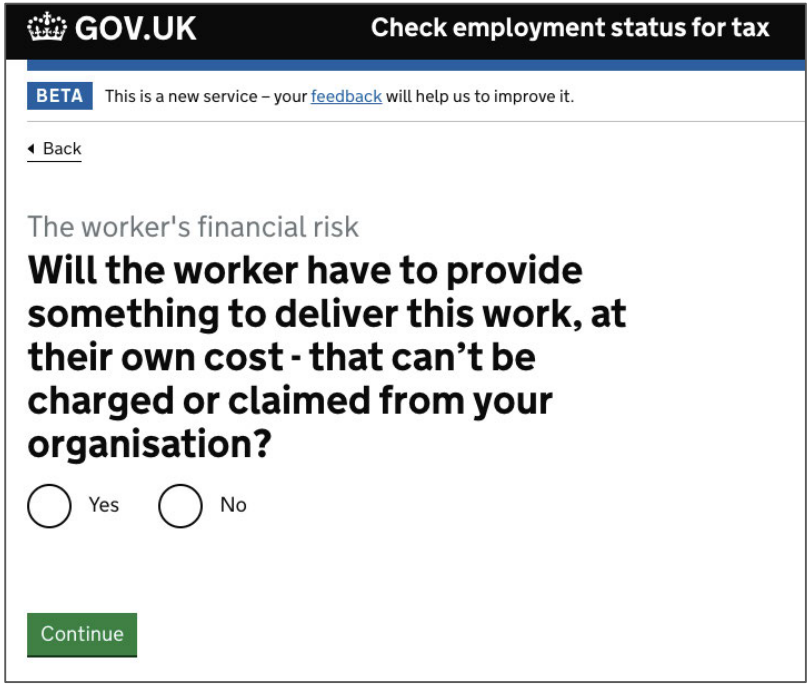
Financial Risk 1of4: Any Expenses?

Worker



/live_v2/worker/expenses

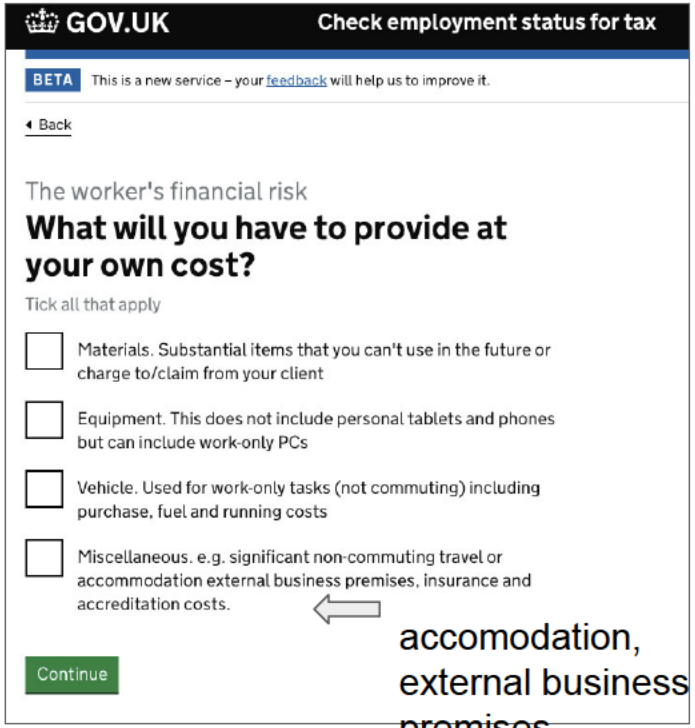
Hirer



/live_v2/hirer/expenses

Financial Risk 2of4: Expense Type

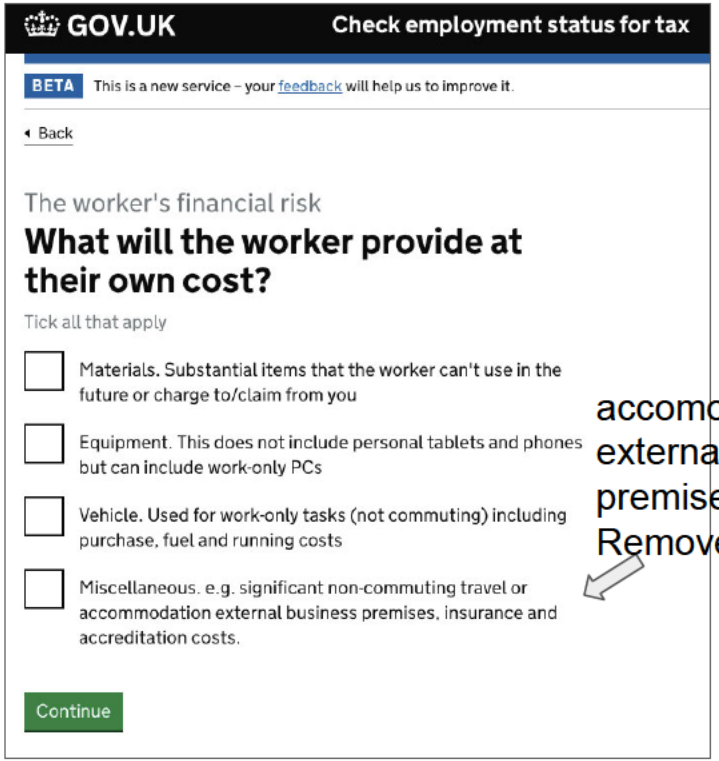
Worker



accomodation, external business premises
Remove full stop

/live_v2/worker/expenses2

Hirer

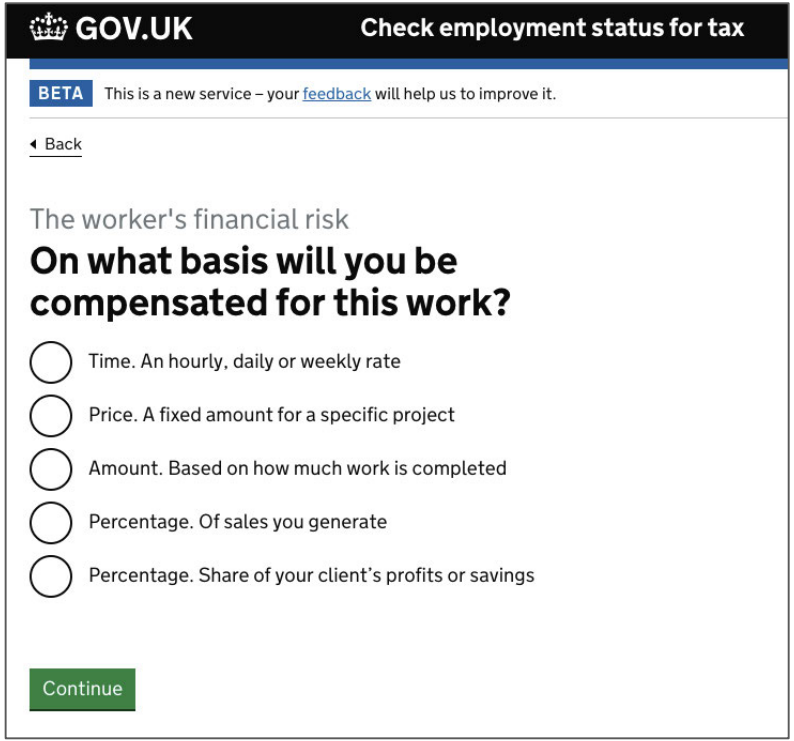


accomodation, external business premises
Remove full stop

/live_v2/hirer/expenses2

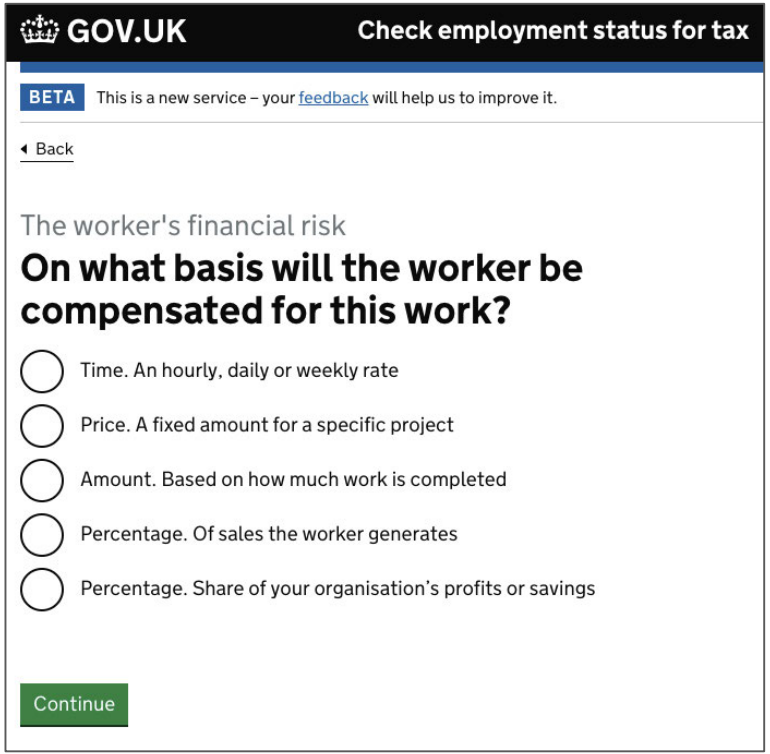
Financial Risk 3of4: Pay

Worker



/live_v2/worker/pay

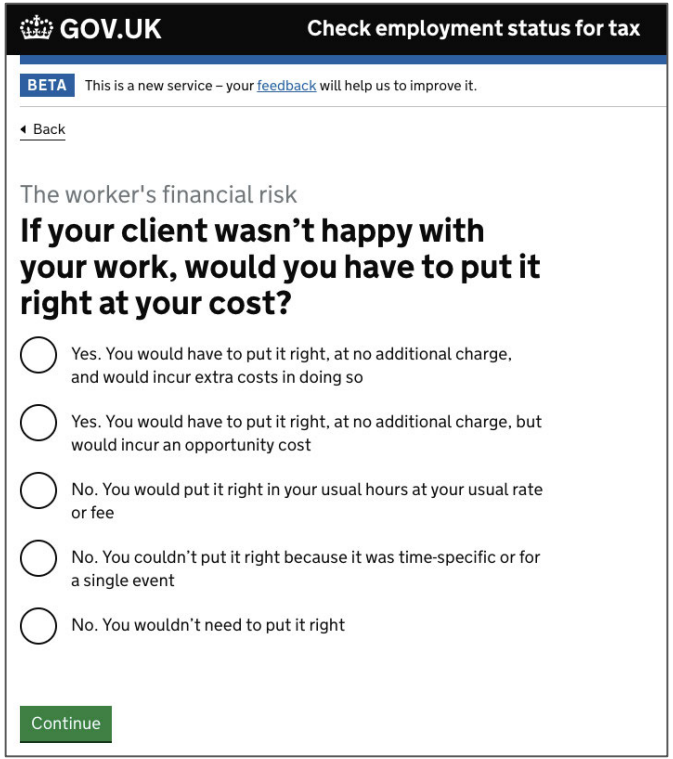
Hirer



/live_v2/hirer/pay

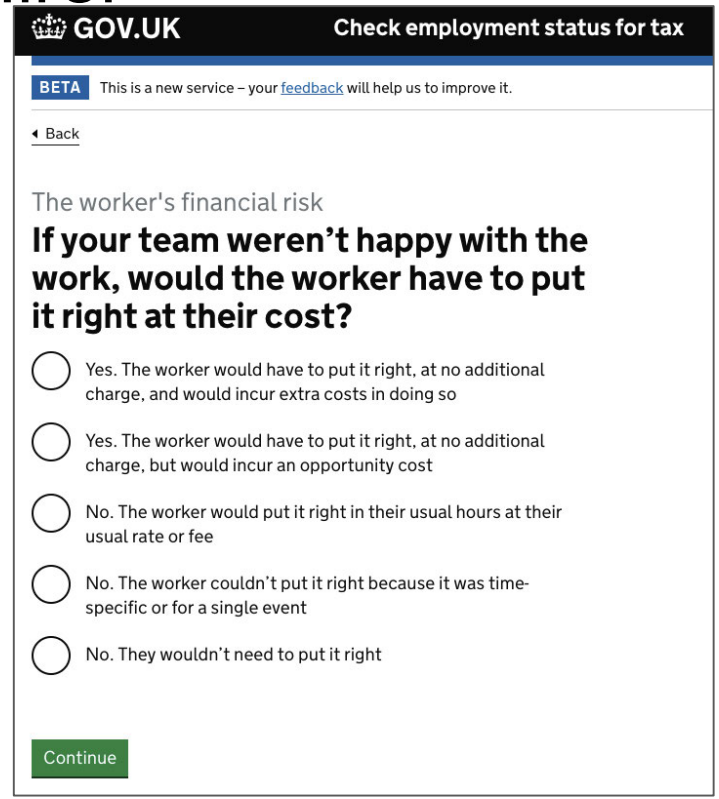
Financial Risk 4of4: Dispute

Worker



/live_v2/worker/dispute

Hirer

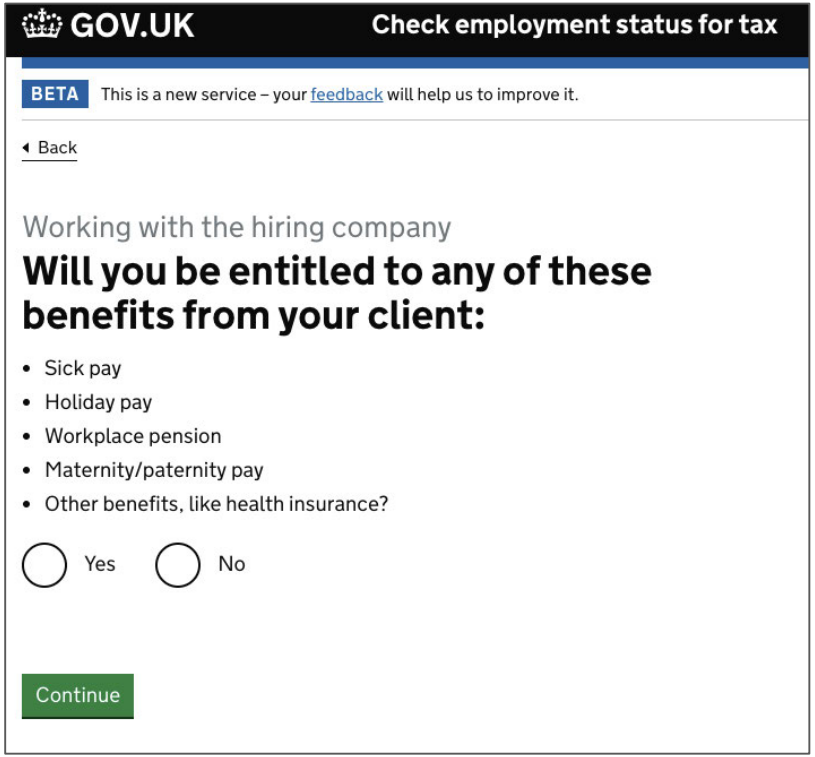


/live_v2/hirer/dispute

Part & Parcel Section

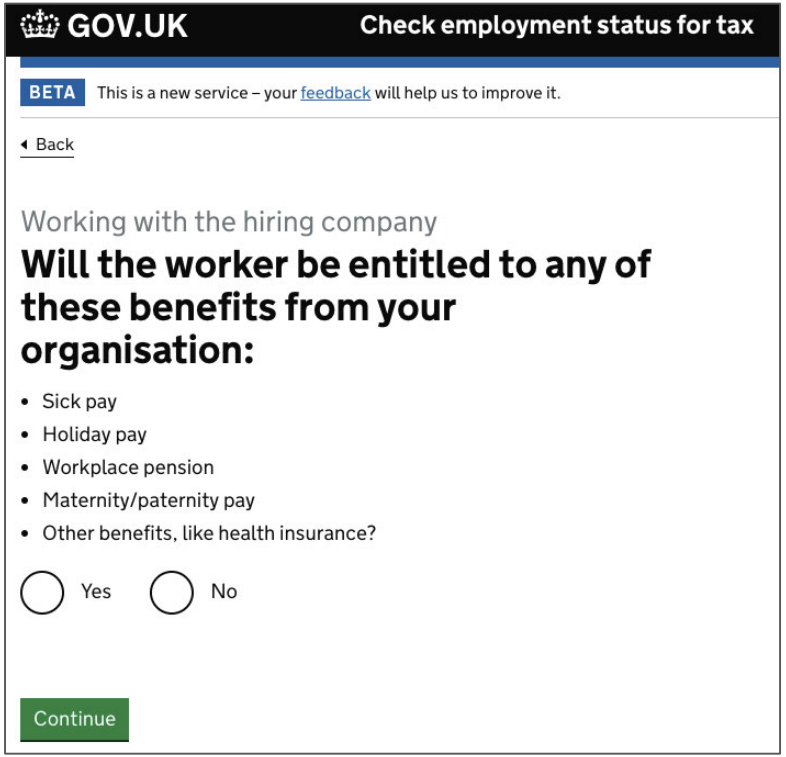
Part & Parcel 1of4: Benefits

Worker



/live_v2/worker/benefits

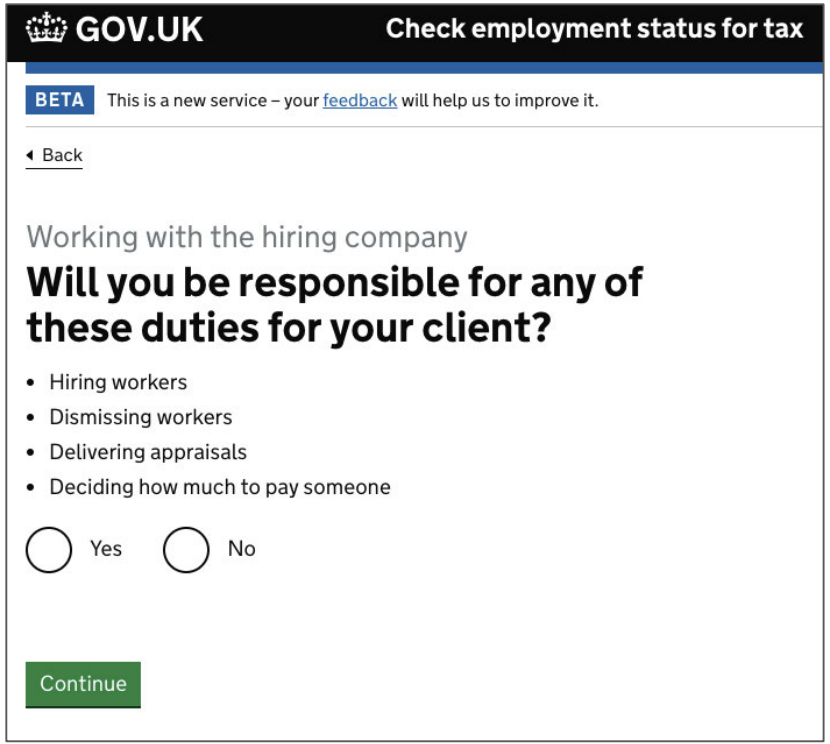
Hirer



/live_v2/hirer/benefits

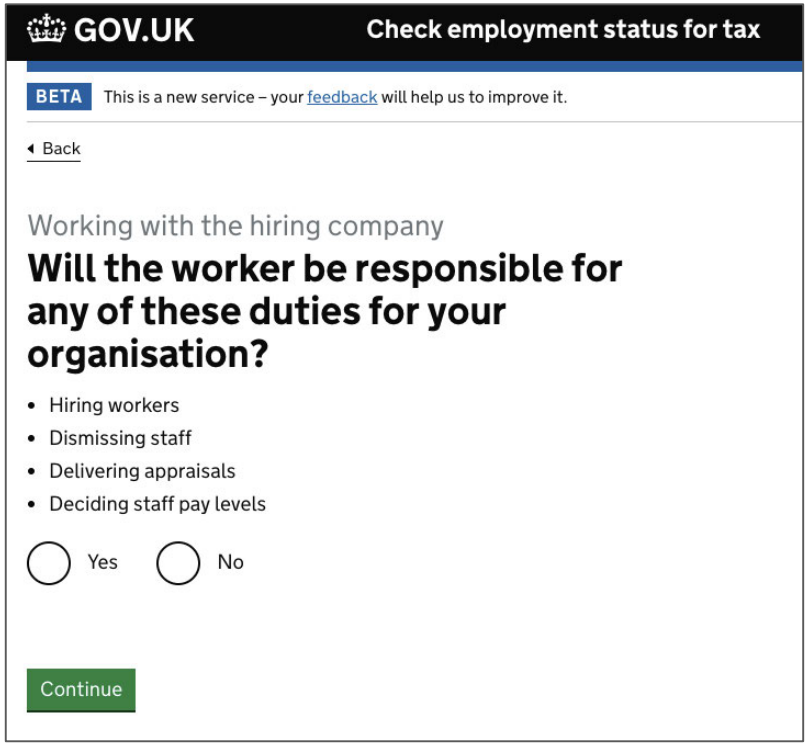
Part & Parcel 2of4: Duties

Worker



/live_v2/worker/duties

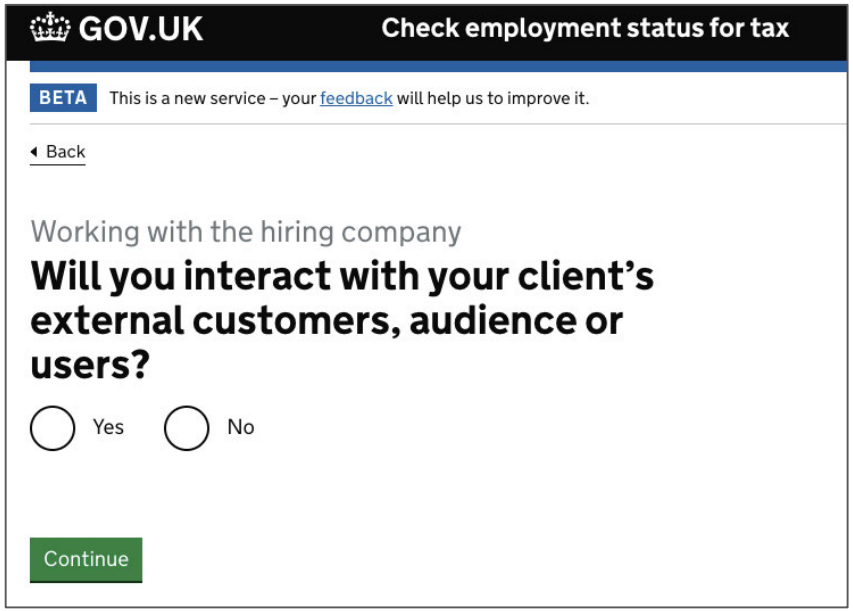
Hirer



/live_v2/hirer/duties

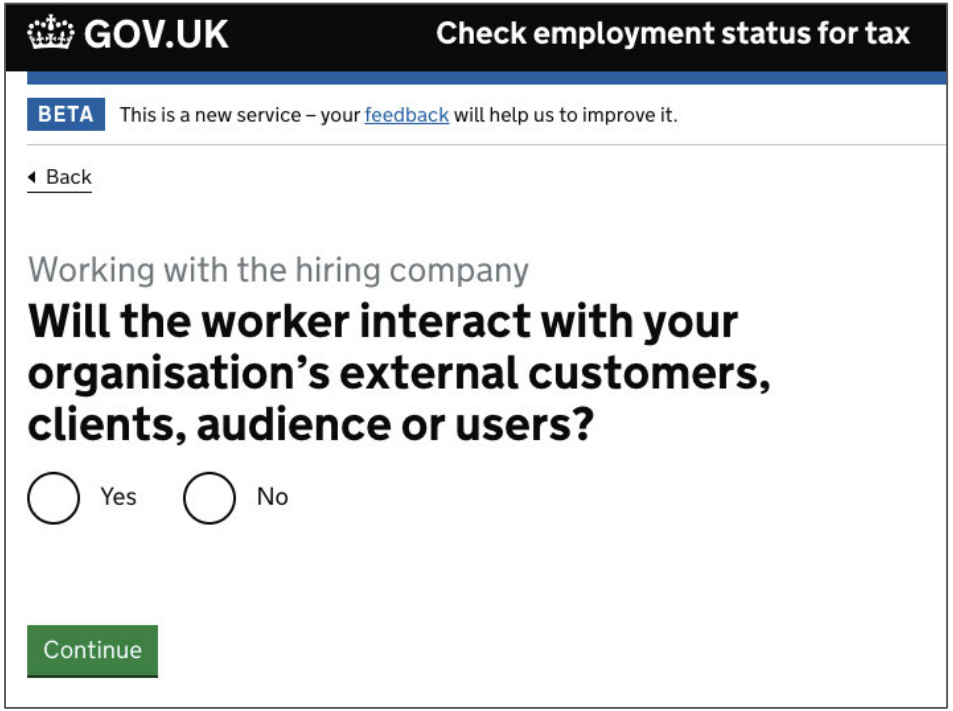
Part & Parcel 3of4: Interaction

Worker



/live_v2/worker/interaction

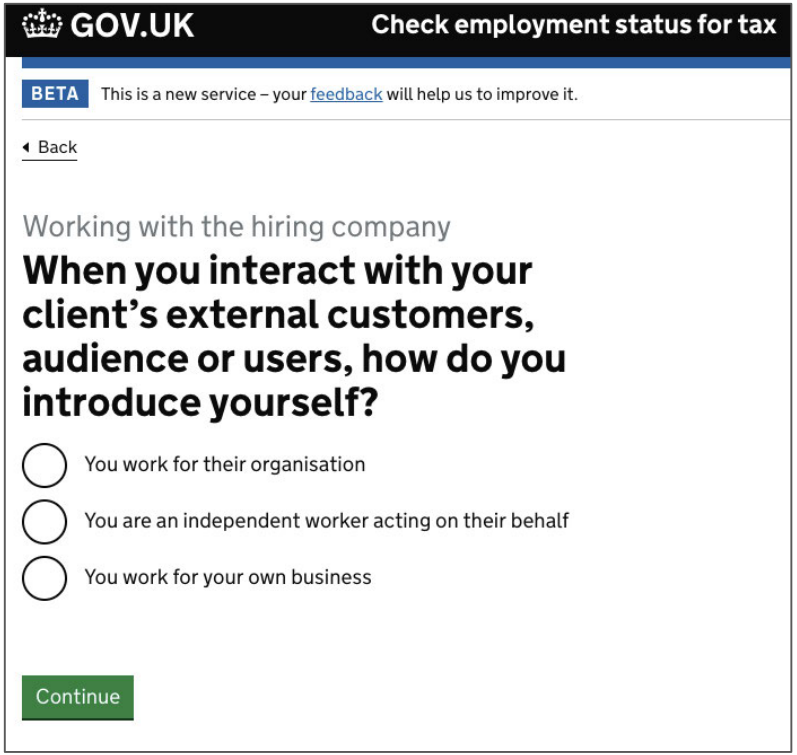
Hirer



/live_v2/hirer/interaction

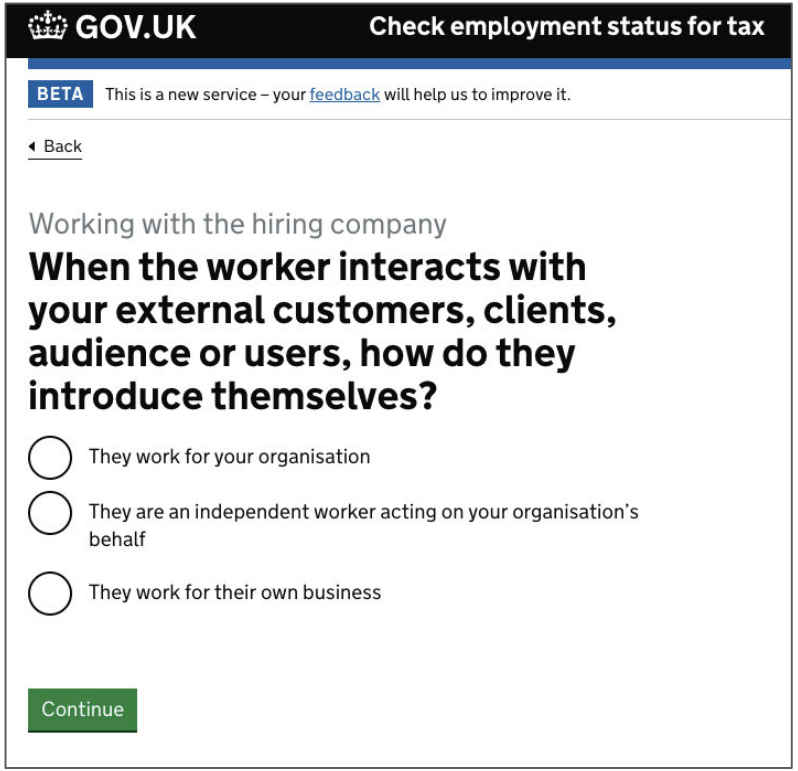
Part & Parcel 4of4: Identity

Worker



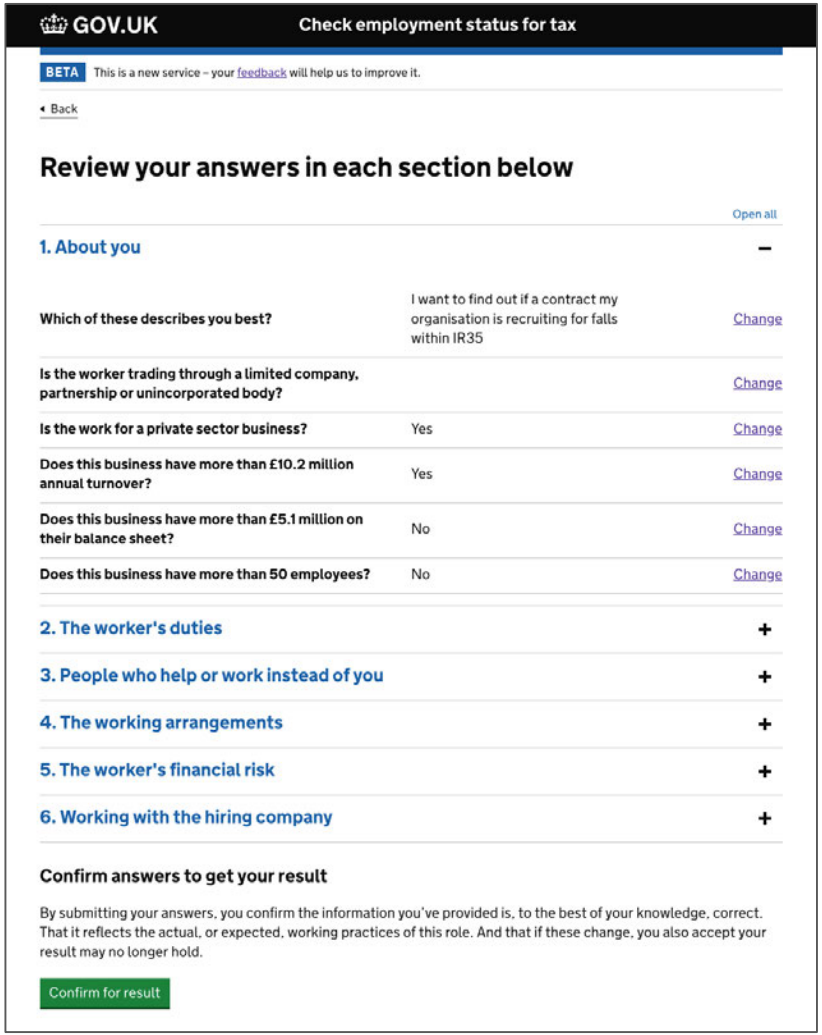
/live_v2/worker/identity

Hirer



/live_v2/hirer/identity

Check answers



GOV.UK Check employment status for tax

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.

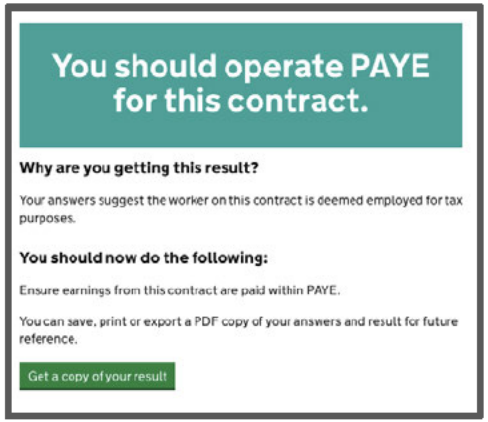
Confirm for result

Result (Inside)

PAYE determination (No Intermediary)

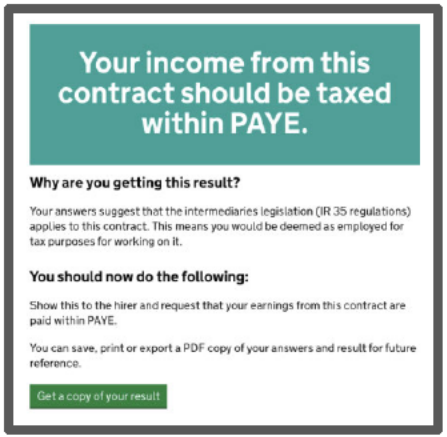
WORKER

HIRER

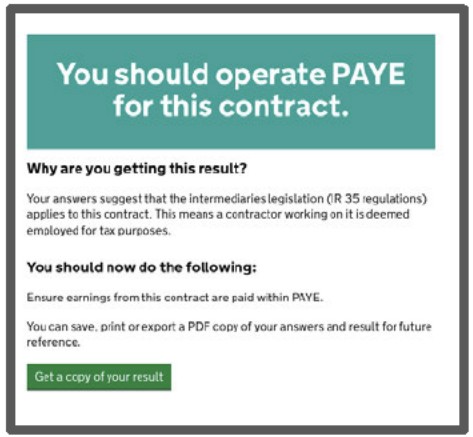


IR35 determination (Intermediaries Legislation)

WORKER



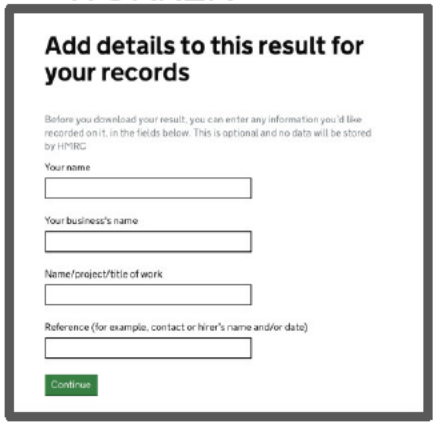
HIRER



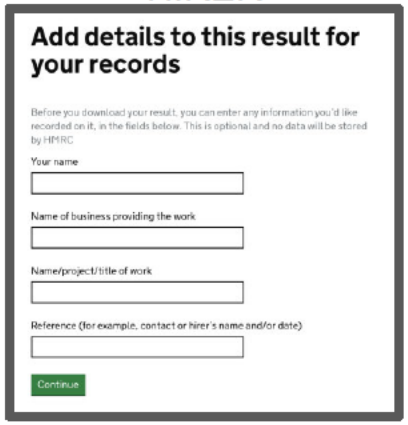
Customise Result

PAYE determination (No Intermediary)

WORKER

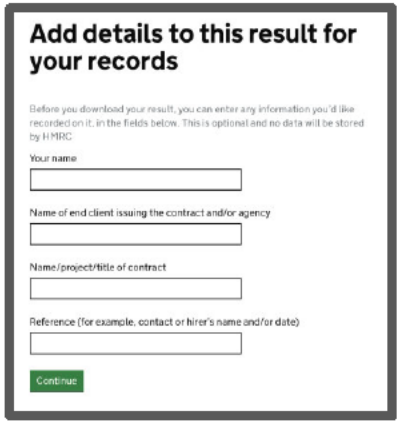


HIRER

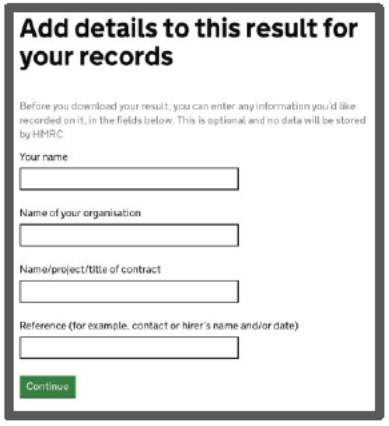


IR35 determination (Intermediaries Legislation)

WORKER



HIRER



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 - 06/03/1	07/03/19 - 20/03/1	21/03/19 - 03/04/1	04/04/19 - 17/04/1	18/04/19 - 01/05/1	02/05/19 - 15/05/1	16/05/19 - 29/05/1	30/05/19 - 12/06/1	13/06/19 - 26/06/1	27/06/19 - 10/07/1
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, Accesibility & 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 Accesibility Testing)

Updates made: Development Lane & Assurance Events

Thank you

Risk and Issues

[redacted]

Number	Description	Mitigation	Owner	Status
1	Due to the contentious nature of the policy change it is likely that information is requested frequently using Freedom of Information Act. There is a risk that resource will be used for low value activity e.g. creating reports or compiling statistics.	1 - Create an easily accessible basket of performance indicators e.g. Performance Dashboard 2 - Store data in an easily accessible format 3 - Be as transparent as possible e.g. UAT in GitHub	[redacted]	Closed
2	Due to timescales it may not be possible to demonstrate iteration based on user feedback (political with a small "p") and assurance	**Escalated to project risk register (Risk and Issues bi-weekly call)** 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.	[redacted]	Closed
3	Deskpro secure email is currently unsupported on a day to day basis	**Escalated to project risk register (Risk and Issues bi-weekly call)** Customer Service Group have agreed to support the deskpro service.	[redacted]	Closed
4	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. **See Assumption No. 2**	**Escalated to project risk register (Risk and Issues bi-weekly call)**	[redacted]	Closed
5	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.	This is mitigated by using a common style guide and [redacted] kindly offered to talk if we had any major concerns. Content designer allocated. We have access to Gov.uk content via Sharepoint. **Escalated to project to consider wider risks to project (Risk and Issues bi-weekly call)**	[redacted]	Closed