	Beta				
Point 1	Understand user needs. Research to de	evelop a deep knowledge of who the ser	vice users are and what that means for	the design of the service.	
Guidance	are particularly looking to see that findings	from the user research are reflected in the ital, ensure that research is done specifical	design of the service as it progresses thro	eds, and this has been done in a way that n ough this phase. Responses should cover b ervice who have the lowest level of digital sl	oth digital and assisted digital support.
Prompts	Questions about user needs: - who are the users? - what have you done to understand your users' needs? - what are the needs that they have when they use this service? How do they meets those needs now? - what are the pain points? - which users have the most challenging needs? - who have you been learning more about these challenging user needs? - what are the particular design challenges for this service with this audience? - tell us about what you've learned about the particular needs of people who are less confident online or not online? - what did you do to discover this? Questions about usability: - how many rounds of usability testing have you done so far? - who have you done usability testing with? - what were the tasks you set for participants and what materials did you supply to help them complete the task (if relevant) what were the tasks you set for participants and what materials did you supply to help them complete the task (if relevant) what were the tasks you set for participants and what materials did you supply to help them complete the task (if relevant) what were the tasks you set for participants and what materials did you supply to help them complete the task (if relevant) what were the tasks you set for participants and what materials did you supply to help them complete the task (if relevant) what were the tasks you set for participants and what materials did you supply to help them complete the task (if relevant) what were the tasks you set for participants and what materials did you supply to help them complete the task (if relevant) what were the tasks you set for participants and what materials did you supply to help them complete the subjection of users in the participants and what materials did you supply to help them complete the subjection of users in the participants and what were the tasks you supply to help them complete the subjection of users in the tasks you supply to help them complete the subjection of users in the tasks you set for participants and w				
Evidence	assessment panel by showing and referrin - user research output of discovery that de points in the current journey and descriptic - stories of people you have met, persona, - the user needs you have identified for thi - any key insights you have gained from th - your research schedule for beta thus far - user research videos and accompanying - examples showing how the design of var	ig to some or all of these artefacts of user nescribes how users (including assisted digits on of the user research that has informed the profiles or some other way of telling the standard service, including any specific needs of a service, including any specific needs of a service, that describes significant service (who you did research with, when and whe user research analysis outputs for recent sious elements in the service have changed	esearch (for the onscreen service and assi- al users) are currently meeting the needs this output. ories of the users (including assisted digital ssisted digital users. the design challenges for this project to over re, including assisted digital users). sprints.	hat this service will meet, (e.g. a customer july users) who will be using this service in the recome.	ourney map or user needs map), key pain the future.
	Lead Assessor	Technical Assessor	User Researcher or Performance Analyst	Designer or Content Designer	Assisted Digital Assessor
Comments					
Pass / Not					

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ut a plan in place for ongoing user rese	earch and usability testing to continuou	usly seek feedback from users to improv	ve the service.			
The main objective is to ensure that you have someone on the team who is dedicated to doing the user research, that there are plans to continue doing user research, and that there is evidence that outcomes from the user research will be fed into the ongoing development/design of the service. Responses should cover both digital and assisted digital support. When doing user research for assisted digital, ensure that research is done specifically with (potential) users of this particular service who have the lowest level of digital skills. Recruitment and research with this audience will need to be done using offline methods. Accessibility testing with people who have particular access needs should be done throughout the service design process and not outsourced as a separate activity at the end of the design process.						
Are the resources in place to do regular user research and usability testing? Who in the team is doing user research and usability testing? How often are you doing user research and usability testing? Are you testing with a full range of end users, including those with low or no ability to use the digital service? Are you doing regular usability testing with people who have particular access needs (accessibility testing)? How is the analytics data feeding into the research plan for the service? How do the results feed into the design of the service? What is the user research plan for the next stage and are there resources for user research and usability testing?						
explain who is doing user research and us alk through the research plan for the next alk through the plan to ensure the resear	sability testing and how it is being resource t stage of the project. ch covers the full range of end users includ	ding accessibility and assisted digital users	s.			
Lead Assessor	Technical Assessor		Designer or Content Designer	Assisted Digital Assessor		
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The second in th	e main objective is to ensure that you had the user research will be fed into the cearch is done specifically with (potential thods. Accessibility testing with people were the resources in place to do regular use to in the team is doing user research and we often are you doing user research and a you doing regular usability testing with a full range of end use you doing regular usability testing with we is the analytics data feeding into the rewide the user research plan for the next er Researcher and/or Service manager and the plan was a solution of the results feed into the design of the plan was a solution of the next er Researcher and/or Service manager and the plan was a solution of the next like through the research plan for the next like through the plan to ensure the research plain how the results from user research	t a plan in place for ongoing user research and usability testing to continuous a main objective is to ensure that you have someone on the team who is dedicated in the user research will be fed into the ongoing development/design of the service earch is done specifically with (potential) users of this particular service who have thods. Accessibility testing with people who have particular access needs should be the resources in place to do regular user research and usability testing? So in the team is doing user research and usability testing? So you testing with a full range of end users, including those with low or no ability to you doing regular usability testing with people who have particular access needs we is the analytics data feeding into the research plan for the service? We do the results feed into the design of the service? We do the results feed into the design of the service? The user research plan for the next stage and are there resources for user research early in the plan to ensure the research covers the full range of end users inclusted into who have plan to ensure the research covers the full range of end users inclusted into who have particular access needs were the plan to ensure the research covers the full range of end users inclusted into who is doing user research and usability testing are incorporated into the results from user research and usability testing are incorporated into the results from user research and usability testing are incorporated into the results from user research and usability testing are incorporated into the results from user research and usability testing are incorporated into the results from user research and usability testing are incorporated into the results from user research and usability testing are incorporated into the results from user research and usability testing are incorporated into the results from user research and usability testing are incorporated into the results from user research and usability testing are incorporated into the user resear	t a plan in place for ongoing user research and usability testing to continuously seek feedback from users to improve the main objective is to ensure that you have someone on the team who is dedicated to doing the user research, that there are in the user research will be fed into the ongoing development/design of the service. Responses should cover both digital and earch is done specifically with (potential) users of this particular service who have the lowest level of digital skills. Recruitment thods. Accessibility testing with people who have particular access needs should be done throughout the service design process the team is doing user research and usability testing? We often are you doing user research and usability testing? We often are you doing user research and usability testing? We often are you doing user research and usability testing? We often are you doing user research and usability testing? We often are you doing user research and usability testing? We often are you doing user research and usability testing? We often are you doing user research and usability testing? We often are you doing user research plan for the service? We do the results feed into the design of the service? We do the results feed into the design of the service? We do the results feed into the design of the service? We do the research plan for the next stage and are there resources for user research and usability testing? We replain who is doing user research and usability testing and how it is being resourced. We through the research plan for the next stage of the project. We through the plan to ensure the research covers the full range of end users including accessibility and assisted digital users optain how the results from user research and usability testing are incorporated into the design of the service.	t a plan in place for ongoing user research and usability testing to continuously seek feedback from users to improve the service. The main objective is to ensure that you have someone on the team who is dedicated to doing the user research, that there are plans to continue doing user research in the user research will be fed into the ongoing development/design of the service. Responses should cover both digital and assisted digital support. When doing user research is done specifically with (potential) users of this particular service who have the lowest level of digital skills. Recruitment and research with this audience will need thods. Accessibility testing with people who have particular access needs should be done throughout the service design process and not outsourced as a separate active. The resources in place to do regular user research and usability testing? The resources in place to do regular user research and usability testing? To in the team is doing user research and usability testing? To the team is doing user research and usability testing? To the team is doing user research and user access needs (accessibility testing)? To the team is doing user research plan for the next stage and are there resources for user research and usability testing? To the team to do the service. To the team to do the service of the service. To the team to do the testing of the service. To the team to do the testing of the service. To the testing to do the testing of the service. To the testing to do the testing of the service. To the testing to do the testing of the service. To the testing to do the testing to do the testing of the service. To the testing to do the testing to do the testing to the testing of the service. To the testing to do the testing to do the testing to the testing to the testing of the service. The testing to the testing to do the testing to th		

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Point 3	Put in place a sustainable multidisciplir	Put in place a sustainable multidisciplinary team that can design, build and operate the service, led by a suitably skilled and senior service manager with decision-making responsibility.						
Prompts	Can you talk us through the team that was in place during alpha and what the team looks like in beta? How was the service manager empowered to make decisions during alpha and is this the case in beta? Can you give us an example? Is the service manager the single responsible person with the power and knowledge to make decisions to improve the service day-to-day during beta? Were there any gaps in the team during alpha and how are you addressing these in beta? Are you using external people and if so, how are you approaching transferring skills and knowledge to the team during peta? Is there a separation of key roles?							
	Service Manager able to: - clearly explain the structure of the team during alpha and beta (the following should be either in the team or available to the team depending on the scale of the service: service manager, product manager, delivery manager, tech architect and lead, assisted digital lead, designer, user researcher, developers, content designer, web ops, product analyst) show they were empowered to make decisions during alpha and are continuing to do so during beta show there are no gaps in the team or explain how they are addressing any gaps in beta explain how they will transfer knowledge from external people to the team during beta show that there is a separation of key roles (i.e. the same person is not performing multiple roles within the service) there is at least one user researcher working at least 3 days per week.							
	Lead Assessor	Technical Assessor	User Researcher or Performance Analyst	Designer or Content Designer	Assisted Digital Assessor			
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Pass / Not								

	Beta							
Point 4	Build the service using the agile, iterati	Build the service using the agile, iterative and user-centred methods set out in the manual.						
Prompts	Talk us through how you have worked in an agile way during alpha and how you are doing so in beta? What tools and techniques have you used during alpha to enable this way of working? How are you reviewing and iterating your processes?How are you adapting your processes to be responsive and iterating them? How are you communicating within the team? Can you give an example from alpha of how you have responded to user research and usability testing? How are you governing the service?							
Evidence	- explain how the service has reviewed an - explain how the team has used agile too - give an example of how the service has	d iterated their processes to be responsi ls and techniques to communicate within responded to user research and usability t imposed, is based on clear and measu	the team. testing during alpha. rable goals, "go and see" rather than "wait an		and risk in real time rather than at			
	Lead Assessor	Technical Assessor	User Researcher or Performance Analyst	Designer or Content Designer	Assisted Digital Assessor			
Comments			Analyst					
Pass / Not pass								

	Beta							
Point 5	Build a service that can be iterated and	Build a service that can be iterated and improved on a frequent basis and make sure that you have the capacity, resources and technical flexibility to do so.						
Prompts	What have you built and why? Describe the lifecycle of a story from user research to production. What are you doing to support frequent deployments with minimal user impact? How long are you expecting the beta period to last and why?							
Evidence	- describe clearly the lifecycle of a story from - explain their deployment process and ho	explain what they have built to this point and why. describe clearly the lifecycle of a story from user research to production. explain their deployment process and how they are able to support frequent deployments with minimal user impact. explain how long they expect the beta period to last and the reasons behind it.						
	Lead Assessor	Technical Assessor	User Researcher or Performance Analyst	Designer or Content Designer	Assisted Digital Assessor			
Comments			Alluyot					
Pass / Not pass								

	Beta							
Point 6	Evaluate what tools and systems will be	Evaluate what tools and systems will be used to build, host, operate and measure the service, and how to procure them.						
Prompts	How are you managing the constraints that the selection of technology stack places on you? How are you managing the constraints that the selected development toolchain places on you? What have you bought and how have you ensured you are getting value for money? How will you know if the service is healthy? What support arrangements have you got in place during beta? What decision making have you outsourced?							
Evidence	- explain how they are managing the cons	ave in place during beta.	chain places on the service. or money.					
	Lead Assessor	Technical Assessor	User Researcher or Performance Analyst	Designer or Content Designer	Assisted Digital Assessor			
Comments			Analyst					
Pass / Not pass								

	Beta								
Point 7		Evaluate what user data and information the digital service will be providing or storing, and address the security level, legal responsibilities, privacy issues and risks associated with the service consulting with experts where appropriate).							
Prompts	Describe your teams approach to security and risk management. Describe the threats to your service. What fraud vectors exist and what controls are you putting in place? Describe your interactions with the business and information risk teams, e.g. SIRO (Senior Information Risk Owner), IAO (Information Asset Owner), Data Guardians. Describe any outstanding legal concerns e.g. data protection or data sharing. Describe your cookie and privacy policy and how you arrived at it?								
Evidence	Service Manager able to: - describe their team's approach to security - describe the threats to their service explain what fraud vectors exist and what - describe their interactions with the busine - describe any outstanding legal concerns - present their cookie and privacy policy ar	t controls they are putting in place. ess and information risk teams e.g. SIRO e.g. data protection or data sharing.	(Senior Information Risk Owner), IAO (Infor	mation Asset Owner), Data Guardians.					
	Lead Assessor	Technical Assessor	User Researcher or Performance Analyst	Designer or Content Designer	Assisted Digital Assessor				
Comments			Allayst						
Pass / Not									

	Beta								
Point 8	Make all new source code open and reu	Make all new source code open and reusable, and publish it under appropriate licences (or provide a convincing explanation as to why this cannot be done for specific subsets of the source code).							
Prompts	Describe how you are making new source code open and reusable? What licences are you using to release code during beta? Do you own the intellectual property? Describe how a team in another department can reuse your code. What code from other teams/services are you using?								
Evidence	- show their code in an open internet source explain what licences they are using to reconfirm that they own the intellectual propexplain how a team in another department	explain how they are making new source code open and reusable. show their code in an open internet source code repository. explain what licences they are using to release code during beta. confirm that they own the intellectual property. explain how a team in another department can reuse their code. explain what code from other teams/service they are using.							
Comments	Lead Assessor	Technical Assessor	User Researcher or Performance Analyst	Designer or Content Designer	Assisted Digital Assessor				
Pass / Not pass									

	Beta							
Point 9	Use open standards and common government platforms where available.							
Prompts	Are you locking yourself into any proprietary solutions where an open standard is available? What does the system output to the users and in what format? Describe your use of common government platforms. Describe the integration mechanisms with any external systems. What common user needs does your service meet and what are you reusing from across government to help meet that user need? What data do you hold and what is your open data responsibility?							
Evidence	 explain what the system outputs to users describe their use of common government describe the integration mechanisms with explain any common user needs their se 	Service Manager able to: - explain how they are avoiding locking themselves into any proprietary solutions where an open standard is available explain what the system outputs to users and in what format describe their use of common government platforms describe the integration mechanisms with any external systems explain any common user needs their service meets and what they are reusing from across government to help meet that user need explain what common data they hold and their open data responsibility.						
Comments	Lead Assessor	Technical Assessor	User Researcher or Performance Analyst	Designer or Content Designer	Assisted Digital Assessor			
Pass / Not pass								

	Beta							
	Be able to test the end-to-end service in an environment identical to that of the live version, including on all common browsers and devices, and using dummy accounts and a representative sample of users.							
Prompts	What environments do you have? How quickly and easily can you create a new environment? What data exists in your pre-production environments? How are you gaining confidence that your service will perform under expected loads? How are you checking that your system works on all the supported devices?							
Evidence	 explain what data exists in their pre-prodice explain how they are gaining confidence describe testing environments, systems, explain how they are checking that their sexplain how they are checking the how the house the house how the house h							
Comments	Lead Assessor	Technical Assessor	User Researcher or Performance Analyst	Designer or Content Designer	Assisted Digital Assessor			
Pass / Not pass								

	Beta						
Point 11	Make a plan for the event of the digital s	Make a plan for the event of the digital service being taken temporarily offline.					
Prompts	Explain the impact upon the users of the beta service being unavailable for any length of time. How are you selecting technology and platforms that meet your availability requirements? What is your data recovery strategy and have you tested it? Explain what things are most likely to take you offline and what mitigations you are considering. What is your strategy for dealing with an incident? Who is responsible and what decisions can they make?						
Evidence	- explain how they are selecting technolog - explain their data recovery strategy and I	a service being unavailable for any length on y and platforms that meet their availability now they have tested it. The service offline and what mitigations the service of the service o	requirements. ney are considering.				
	Lead Assessor	Technical Assessor	User Researcher or Performance Analyst	Designer or Content Designer	Assisted Digital Assessor		
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Pass / Not							
pass							

	Beta				
Point 12	Create a service that is simple and intui	itive enough that users succeed first tin	ne.		
Prompts	What evidence can you provide that users Were less digitally minded and non subject How were the design and content decision Have you checked that the content used were the current version of the service been Are you demonstrating just the happy path. What prototype testing have you done so the What did and do you plan to test? How did and do you test the prototype with What have you learnt? What did you change? What didn't you change and why? How many other versions of the prototype Why did you choose this version?	et area experts able to use the beta service is made in beta? vithin the service aligns with the content puin tested for accessibility? In - what thought has gone into other paths far?	Assisted digital support: Which routes of assisted digital support wi How do they meet user needs? What are your plans to test your assisted of Can you iterate your assisted digital support full end-to-end user journey?	digital support during beta?	
Evidence	Service Manager able to: - show the majority of users of the service are succeeding first time. - explain how the design and content decisions for the service were made, and relate back to user research, usability testing and analytics. - show the service is accessible. - explain other paths in the service and demonstrate that they work. - show videos of usability testing. - talk through substantial iteration in the design and content of the service.			Assisted digital support: Service Manager able to: - talk through how the assisted digital suppneeds, including routes and providers. If n by face, talk through and on behalf of), expexplain the end-to-end user journeys for assurance (e.g. Verify) if required explain how you will test your assisted di lowest level of digital skills and access explain how you will test the end-to-end identity assurance (e.g. Verify) if required explain how you are able to iterate your and providers, for the full end-to-end journ	ot providing all types (telephone and face olain why. assisted digital support, including identity gital support in beta, with users with the user journey for each route, including assisted digital support across all routes
	Lead Assessor	Technical Assessor	User Researcher or Performance Analyst	Designer or Content Designer	Assisted Digital Assessor
Comments			Analyst		
Pass / Not pass					

	Beta						
Point 13	Build a service consistent with the user experience of the rest of GOV.UK including using the design patterns and style guide.						
Prompts	Has a designer and content designer been involved during the development so far? Is there a designer and content designer in the team or available to the team during beta? Have you used the GOV.UK design patterns and front-end tool kit during alpha and are you doing so during beta? Do you have a front-end developer in place for beta development? Have you used the GDS style guide during alpha and are you doing so during beta? Is the service responsive? Can you show us it works on mobile? Do the headers and footers match the GOV.UK style?						
Evidence	Service Manager able to: - explain how the service has used the GOV.UK design patterns, front-end tool kit and GDS style guide explain what design, content design and front-end developer support are available to the team during beta show the service is responsive and works on mobile show that the headers and footers match the GOV.UK style.						
	Lead Assessor	Technical Assessor	User Researcher or Performance Analyst	Designer or Content Designer	Assisted Digital Assessor		
Comments			Allayor				
Pass / Not							

	Beta						
Point 14	Encourage all users to use the digital service (with assisted digital support if required), alongside an appropriate plan to phase out non-digital channels/services.						
Prompts	What is your plan for increasing digital take up during beta? Tell us about your evidence base to support these plans? How are you able to assess if users are shifting away from your non-digital channels to your digital one? How have you tested the effectiveness of your messaging with real users? What is your plan for engaging with other delivery channels (for your service) to promote digital take-up?						
Evidence	Service Manager able to: - explain how they plan to increase digital take up during beta. - explain the evidence base behind their plans for increasing digital take up. - demonstrate (at least) weekly analytics/metrics for usage volumes across channels. - demonstrate how your messaging has improved based on user insight and how it has performed based on analytics. - explain engagement across all delivery channels and planning for promoting digital take-up.						
	Lead Assessor	Technical Assessor	User Researcher or Performance	Designer or Content Designer	Assisted Digital Assessor		
Comments	Analyst Designer of Content Designer Assisted Digital Assessor						
Pass / Not pass							

	Beta					
Point 15	Use tools for analysis that collect performance data. Use this data to analyse the success of the service and to translate this into features and tasks for the next phase of development.					
Prompts	What have you instrumented and why? Have you modelled user journeys, and are you able to track progression through your service so you can identify completions and areas of poor performance? Where appropriate, have you built a funnel, exit paths? What tools are you using to collect data? Has the SIRO signed these off? Where appropriate, have you anonymised the user IP address, have you opted out of data sharing with 3rd parties? What analysis has been carried out on the service so far and how has this impacted on the backlog? What is the ongoing roadmap for performance analysis, including performance of assisted digital support? Who in the team is responsible for identifying actionable data insights, including for assisted digital support? What is the next performance analysis user story? Have you started discussions with GOV.UK about start and end pages?					
Evidence	Service Manager able to: - explain what data sources and analysis have been undertaken in the alpha stage explain how the shape of the service has influenced the choice of metrics, data points and data sources explain the choice of analysis tools used in the beta (and alpha if appropriate) show that appropriate information security and privacy issues have been addressed explain how they have modelled user journeys and will track progression through the service so they can identify completions and areas of poor performance in the beta talk clearly about evidence from qualitative and quantitative data, what they learned from these sources and what changes to user needs/improvements they identified talk through how these were prioritised and what features were changed or implemented talk about the ongoing roadmap for performance analysis, and explain who in the team is responsible for identifying actionable data insights during the beta, including for assisted digital support explain the next performance analysis user story show they have discussed and agreed start and end pages with GOV.UK and these are optimised.					
	Lead Assessor	Technical Assessor	User Researcher or Performance Analyst	Designer or Content Designer	Assisted Digital Assessor	
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Pass / Not pass						

	Beta					
Point 16	Identify performance indicators for the service, including the 4 mandatory key performance indicators (KPIs) defined in the manual. Establish a benchmark for each metric and make a plan to enable improvements.					
Prompts	Have you identified the behaviour, characteristics and dependencies of the new service and the factors that influence the choice of metrics and data sources for those metrics? Have these metrics changed since alpha review, and if so why? How are you measuring the performance of the existing (if applicable) and beta service across digital, non-digital and assisted-digital channels? How are you collecting user journey data for the new service during beta? How are you collecting usage volume or digital take up data during beta? How are you collecting usage volume or digital take up data during beta? How are you collecting cost per transaction (or equivalent*) data during beta? How are you collecting other identified metrics data during beta? How are you collecting other identified metrics data during beta? How are data analytics and user research being used to identify % of users who could channel shift and who will need assisted digital services? What are their plans for engaging with service users, delivery partners or other stakeholders during the beta phase?					
Evidence	Service Manager able to: - explain changes to the metrics collected since alpha and the reasons for change (if any) show how they currently measure the performance of the existing service (if applicable) and which measures will provide a baseline for the new service show how they are collecting users journey data for the new service during beta (using a chosen analytics package) show how they are collecting and calculating cost per transaction (or equivalent*) during beta show how they are collecting user satisfaction data during beta (GOV_UK' done page' questionnaire or other) show how they are collecting completion rate (or equivalent*) data during beta show how they are collecting other metrics data (including journey stage information) during beta explain how they plan to increase digital take up during beta explain how they are assessing potential for channel shift and level of assisted digital services required explain how they are engaging with beta users, delivery partners and other stakeholders to manage transition to live service explain how they will track migration from online to offline. * for non-transactional user journeys					
	Lead Assessor	Technical Assessor	User Researcher or Performance Analyst	Designer or Content Designer	Assisted Digital Assessor	
Comments						
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	Beta					
Point 17	Report performance data on the Performance Platform.					
Prompts	Have you agreed what metrics are going on the performance platform? What data is being uploaded to the performance platform during beta? How is data being uploaded to the performance platform during beta? Is the performance dashboard available for use?					
Evidence	Service Manager able to: - show the beta dashboard with baseline data and explain the audience and use of the dashboard during beta show which metrics are being uploaded to the performance platform and how they are uploaded (manual, automatic) show published performance dashboard.					
	Lead Assessor	Technical Assessor	User Researcher or Performance Analyst	Designer or Content Designer	Assisted Digital Assessor	
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	Beta					
Point 18	Test the service from beginning to end with the minister responsible for it.					
Prompts	How are you planning to test the service with the minister responsible for it before the service moves into live?					
Evidence	Service Manager able to: - explain how they will test the service with the minister responsible for it before the service moves into live.					
	Lead Assessor	Technical Assessor	User Researcher or Performance Analyst	Designer or Content Designer	Assisted Digital Assessor	
Comments						
Pass / Not pass						