


Apply for new style ESA

Version 7 notes

Start page

Added duplicates of the GOV.UK 'How to claim new style ESA' step by step navigation and the mainstream guidance. This was for the purposes of testing only. The aim was to see whether this helped users understand the application process or whether we have to do more to provide reassurance. Users didn't immediately spot the step by step but liked it when they found it – even if they were surprised by the process. It was interesting to see them moving through the guidance – mostly straight to eligibility. It did slow down reading – people still skimmed but as they read aloud you could tell they were taking in more as they were reading it out.

Before:

 **GOV.UK**

Apply for new style Employment and Support Allowance

Apply for 'new style' Employment and Support Allowance (ESA)

Use this service if you:

- need money because you're off work with an illness, injury or disability
- have paid National Insurance in the last 2 tax years

What to expect

This is the first stage of your application.

You'll also need an appointment to prove your identity and agree your responsibilities.

You might also need to go to a Work Capability Assessment.

Before you start

Make sure you have your:


- National Insurance number
- bank or building society details
- GP surgery name and address

You'll also need details of any:

- current or recent work
- pensions that you're getting
- permanent health insurance or income protection payments

[Start now >](#)

After:

 **GOV.UK**

Apply for new style Employment and Support Allowance

Part of

[How to claim 'new style' Employment and Support Allowance \(ESA\): step by step](#)

Employment and Support Allowance (ESA)

Contents

- [Overview](#)
- [What you'll get](#)
- [Types of ESA](#)
- [Eligibility](#)
- [Apply](#)
- [Report a change of circumstances](#)
- [Moving from Incapacity Benefit to ESA](#)

Apply

You can apply for new style Employment and Support Allowance online.

You're eligible to apply if you:

- need money because you're off work with an illness, injury or disability
- have paid National Insurance in the last 2 tax years

What to expect

The online form is the first stage of your application.

You'll also need an appointment to prove your identity and agree your

Part of

[How to claim 'new style' Employment and Support Allowance \(ESA\): step by step](#)[Show all](#)

- 1 **Check you're eligible**
[Show](#)
- 2 **Start your claim and arrange your interview**
[Show](#)

What are the names of the conditions, illnesses or injuries you have?

Added an autocomplete feature with a limited dataset for testing. This will eventually use condition names from the Incapacity Reference Guide and 'fuzzy matched' alternatives. Users can write their own if they can't find the name of their condition. People found this useful as it reduced the amount of effort and caught spelling mistakes.

Before



Apply for new style Employment and Support Allowance

What health conditions, illnesses or injuries do you have?

Continue

After



Apply for new style Employment and Support Allowance

What are the names of the conditions, illnesses, or injuries you have?

abd	ominal pain
Abdominal pain	
Colic, abdominal or intestinal	
Colic, abdominal	
Pain, in abdomen	

Continue

Which doctor's surgery or medical centre do you use?

Surgery phone number moved below address as users found it awkward above.

Are you currently doing any voluntary work?

This question and all subsequent volunteering questions moved to the start of the work question flow to reduce ambiguity for users when they're asked about work later.

Voluntary work details

Hint text added to tell the user they can add other jobs later. Users seemed to understand this in testing.

What do you do at <organisation name>?

New screen to capture information about what they do. This covers the varied nature of volunteering and also gives the decision maker more to go on to decide whether they should be getting paid for it. Testing showed this was understood and users put in tasks.



Apply for new style Employment and Support Allowance

What do you do at Oxfam?

Continue

Do you volunteer for the same number of hours a week at <organisation name>?

Content mostly unchanged apart from the organisation name being played back on every loop of adding a voluntary position. Tested well.

Does <organisation name> pay you any expenses?

Content mostly unchanged apart from the organisation name being played back on every loop of adding a voluntary position. Tested well.

What are the expenses for and how much do you get?

'Provide' changed to 'Give' to make it plainer.

What are the expenses for and how much do you get?

Give as much information as you can.

Do you do any other voluntary work?

New add another screen with organisations they've already added listed at the top.

**You have added details for:
Oxfam**

Do you do any other voluntary work?

☐ Yes

☐ No

Continue

Are you currently employed, even if you're not working at the moment?

New wording. Previous wording 'Do you have a paid job' confused users in testing and insights from work coaches supports our finding that current question does not allow for the variety of ways people work. The 'even if you're not working at the moment' has been made more prominent to see if it helps users who are off sick or not doing any hours. Hint text styled as a paragraph rather than a hint to make it more obvious.

Before

Do you have a paid job?

Answer no if you only do unpaid voluntary work – you'll be asked about this later.

☐ Yes, I have a paid job

☐ No, I do not have a paid job

Continue

After

Are you currently employed, even if you're not working at the moment?

Select yes if you are self employed or on a zero hours contract.

☐ Yes, I'm currently employed

☐ No, I'm unemployed

Continue

Employment details

Hint text added to tell the user they can add other jobs later. Need to test if this is sufficient.

Are you off sick from your job at <company name>?

New screen – changed from ‘are you working at the moment’ as this confused users. Seen as too similar to ‘Do you have a job’. Company name is played back to the user on every loop of adding jobs.

Are you off sick from your job at Boots?

☐ Yes

☐ No

Continue

What is your employment status at <company name>?

New question to see if this makes the ‘Are you self-employed’ and ‘Are you a company director’ make more sense and reduce clicking through screens and also to make the content clearer when it’s played back on each loop of adding jobs.

What is your employment status at Boots?

Select all that apply.

☐

Employee

☐

Self-employed

☐

Sub-contractor

☐

Company director

Continue

Do you work the same number of hours each week at <company name>?

Content mostly unchanged in this version, other than the addition of the played back company name.

How often are you paid at <company name>?

Content mostly unchanged in this version, other than the addition of the played back company name.

Do you get help from a professional support worker at <company name>?

Hint text changed to specify that the professional support worker must be from a public body or voluntary organisation. Looking for a definitive list – Access to Work have one. Company name played back to user in question.

Do <company name> pay you any expenses?

Changed from 'Do you get paid for any expenses at work' to make the language more active and play back the company name.

Do you get paid for any expenses?

☐ Yes

☐ No

Continue

After

Do Boots pay you any expenses?

☐ Yes

☐ No

Continue

What are the expenses for and how much do you get?

'Provide' changed to 'give' as it is plainer.

Do you have another job?

New add another screen. Name of all employer's they've added is played back at the top of the screen as an indication of progress.

**You have added details for:
Boots**

Do you have another job?

☐ Yes

☐ No

Continue

What date did you last work at <company name>?

Content unchanged but routing changed – users answer this for each loop of adding other jobs, but only if they are off sick.

Are you getting any Statutory Sick Pay?

Question amended to focus only on SSP. This is because we need more information for SSP than the other statutory payments.

Are you getting Statutory Sick Pay?

Your employer or accountant can tell you this.

☐ Yes

☐ No

Continue

When does your Statutory Sick Pay end?

New screen – related to the claim date. Users can still claim in advance if their SSP is ending in the next 3 months.

When does your Statutory Sick Pay end?

Your employer or accountant can tell you this.

Day Month Year

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Continue

Are you getting any of the following payments?

Statutory sick pay removed from this list.

Have you had any sick pay in the last 12 weeks?

New screen for unemployed users who may have received SSP within the last 3 months. This may affect their claim date.

Have you had any Statutory Sick Pay in the last 12 weeks?

☐ Yes

☐ No

Continue

Do you know when you will be fit for work again?

Date made people nervous in testing as they felt they would be held to it. Changed to a selection of time ranges to see if that helps. Need to check with Policy about why we need this.

Before:

Do you know when you will be fit enough for work again?

☒ Yes

When do you go back to work?

Day Month Year

<input type="text"/>	<input type="text"/>	<input type="text"/>
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☐ No

Continue

After:

Do you know when you will be fit for work again?

- ☐ 2 to 4 weeks
- ☐ 4 to 8 weeks
- ☐ 8 to 12 weeks
- ☐ 12 weeks or more
- ☐ I do not know

[Continue](#)

Are you getting money from a pension or annuity?

New content tested over Christmas break and added to the prototype. Users preferred reference to 'getting money' to distinguish between having a pension that you are still adding to. Previous content was 'Do you get payments from a pension scheme or annuity?'

The hint text defining pensions and annuities has been placed in a details reveal as research showed that the information was distracting for users. We're going to test whether this helps.

Before

Do you get paid from a workplace pension scheme or annuity?

Workplace pensions include:

- occupational pensions
- personal pensions
- public service pensions
- stakeholder pensions
- pension from a self employed pension scheme

An **annuity** is an insurance product that allows you to swap your pension savings for a guaranteed regular income that will last for the rest of your life.

- ☐ Yes, I am receiving money from a pension or annuity
- ☐ No, I am not receiving money from a pension or annuity

Continue

After

Are you getting money from a pension or annuity?

▼ [What is a pension or annuity?](#)

Pensions include:

- workplace pensions
- personal pensions
- public service pensions
- stakeholder pensions
- pension from a self employed pension scheme

An **annuity** is an insurance product that allows you to swap your pension savings for a guaranteed regular income that will last for the rest of your life.

- ☐ Yes, I'm getting money from a pension or annuity
- ☐ No, I'm not getting money from a pension or annuity

Continue

Pension or annuity details

Hint text added to show they can add other pensions later. Not ideal – but want to test it before doing anything more.

What is the amount before deductions from <pension name>?

Unchanged in this version other than playing back the pension name. Drop down for frequency to test the interaction versus having a radio button with a reveal as in the work questions.

What is the amount before deductions from Prudential?

How often do you get this amount?

Continue

Was this pension left to you by someone when they died?

New question – we disregard inherited pensions but there is still a requirement from the business to capture pension information in JSAPS. We are going back to check this to ensure compliance with GDPR and also because it makes for a poor user experience.

Was the Prudential pension left to you by someone who has died?

This is also known as an inherited pension.

☐ Yes

☐ No

Continue

Are you getting any other pensions and annuities?

New 'add another' question screen that loops the user back to the start of the pension question flow.

You have added details for:
Prudential

Are you getting any other pensions or annuities?

☐ Yes

☐ No

Continue

Are you getting any payments from a permanent health insurance policy?

Hint text changed to make it clear what permanent health insurance is. Definition adapted from the 2013 ESA regulations.

Now reads: Permanent health insurance protects your income if you stop work due to an illness, injury or disability.

Permanent health insurance details

'Permanent' added to the H1 to reduce ambiguity between different types of health insurance.

Did your employer pay more than half of the premiums for the policy yourself?

Shifted the focus from you to the employer to help sift out people who have bought their own income protection policies.

Before:

Did you pay more than half of the premiums for this policy yourself?

☐ Yes

☐ No

Continue

After:

Did a previous employer pay more than half of the premiums for the Aviva policy?

☐ Yes

☐ No

Continue

How much do you get before deductions from <health insurance name>?

Unchanged in this version other than playing back the insurance name.

Are you getting money from any other permanent health insurance policy?

New 'add another' screen which loops the user back to the start of the permanent health insurance questions so they can add more than one.

Do you have an email address?

Removed from this version as currently nowhere for this information to be stored. There will be a change soon to allow users to give alternative contact details but until we have established where this information will be stored, it will not be in the prototype. In testing, users appreciated having this question and though it was so they could be contacted in a more convenient way.

Where do you want to be paid?

Bank or building society name field added as this is required. Anecdotal evidence from subject matter expert that many users add the wrong sort code so they need this information so they can check and correct.

What date do you want to claim from?

This made many participants nervous in testing. They had no idea what date to put and were worried about being held to a date that was wrong.

Input changed to a date as this is essential for the application and difficult for the claimant to change once set. This way they can set their own date based on when they were first out of work or their SSP stopped.

Hint text added to provide information about what date this could be and the fact it will be confirmed before setting it. The word 'confirmed' as it was less negative than 'checked'.

Before

Do you know the date you want to claim from?

Any date you enter will be checked once your application is submitted



Yes

Date you want to claim from

Day

Month

Year



No

Continue

After:

What date do you want to claim from?

You can claim from:

- the day after your Statutory Sick Pay finishes
- a date up to 3 months ago if you have fit notes to cover that period

This date will be confirmed with you to make sure you're getting the money you're entitled to.

Day

Month

Year

Continue

Check your answers before sending your application

New screen added with dummy data to establish whether this meets the need for reassurance that users mentioned in testing. To be tested on 7 January 2018.

Check your answers before sending your application

Your health conditions

Conditions	Abdominal pain Started June 2013	Change
	Broken leg Started 20 November 2018	
Doctor's details	Dr Sarah Philips 72 Guild street London SF23 6FH 020 7946 0809	Change
Life expectancy	Could be less than 6 months	Change
Doctor has sent DS1500 form	No	Change
Currently in hospital	Yes	Change

Application submitted

First paragraph turned into a lead paragraph style to summarise where they are in the process. This was after users expressed frustration in testing that the application is just part of the process.