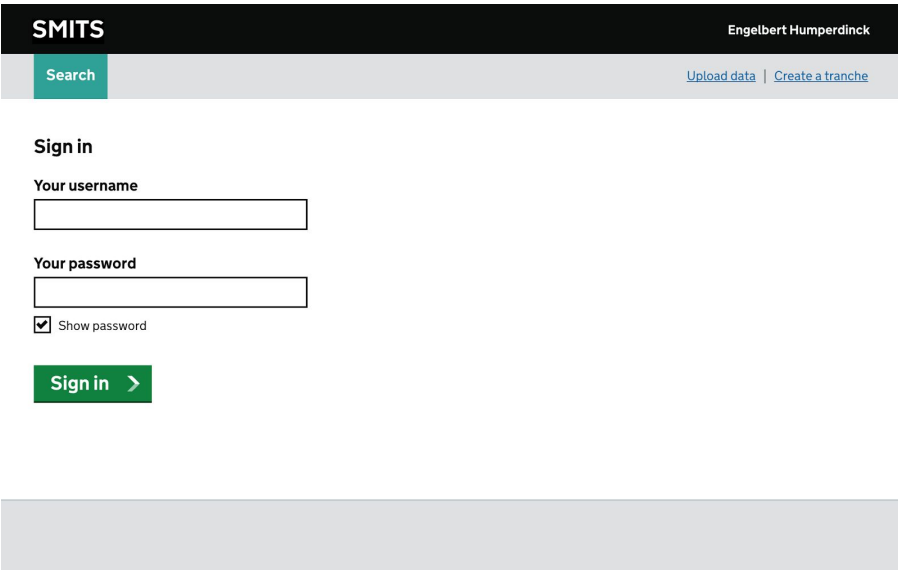
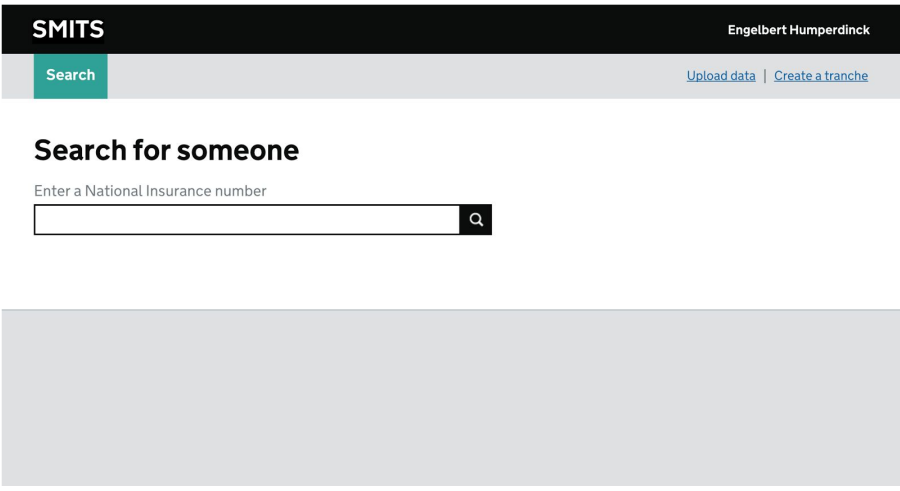
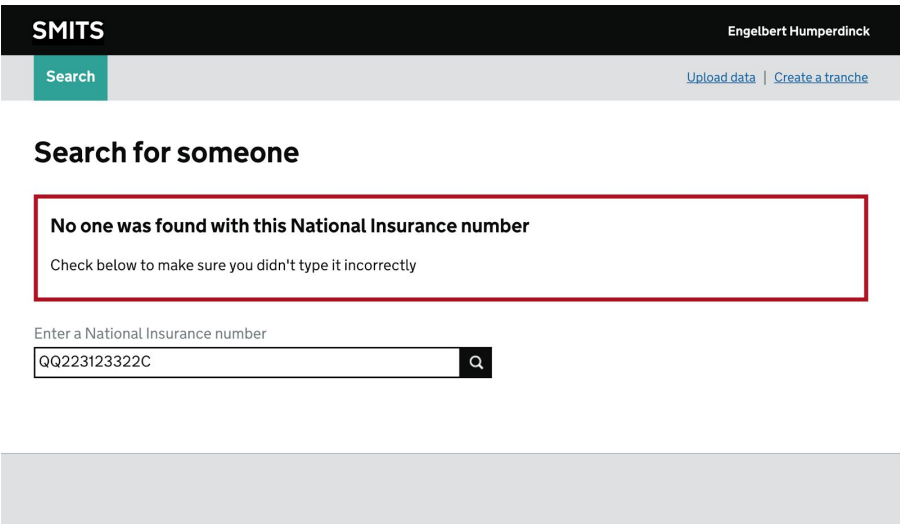


Screen	Suggested content in blue
	<p>[H1] Sign in</p> <p>[H2] Username</p> <p>[H2] Password</p> <p>[Tickbox] Show password</p> <p>[Button] Continue</p> <p>Q: What function does 'Search' at the top serve?</p>

	<p>[H1] Find someone</p> <p>Enter a National Insurance number</p>
	<p>Find someone</p> <p>No one was found with this National Insurance number.</p> <p>Check the number and try again.</p> <p>Enter a National Insurance number</p> <p>QQ223123322C</p>
<p>Status messages</p>	<p>Q: should we refer to status here? As we refer to it later when we want to update status.</p>

	<p>Not yet contacted</p> <p>Waiting for decision. Documents sent out.</p> <p>Transition declined. Send summary.</p> <p>Transition declined. Summary sent.</p> <p>Transition agreed. Send summary, charge document and loan agreement.</p> <p>Transition agreed. Waiting for documents to be returned.</p> <p>Transition agreed.</p> <p>Mortgage interest benefit payments will be converted to a loan from X date.</p>
--	--

Search

[Upload data](#) | [Create a tranche](#)

Jamie Rees

QQ123456C

[Edit](#)

This person has agreed to transition. Arrange for mortgage interest benefit payments to be converted to an SMI loan from 'A' day.

Charge document returned

Thursday, 15th July 2017

Customer agreed to charge

Loan agreement returned

Thursday, 26th June 2017

Charge document sent

Thursday, 10th June 2017

Loan agreement sent

Thursday, 10th June 2017

Contacted by information provider

Thursday, 1st June 2017

Customer agreed to loan

Details sent to letter provider & information provider

Thursday, 12th May 2017

Date of birth

24th Jan 1987

Address

1 The Street
Kingston-upon-hull
KD12 9FT

Phone number

0777 555 008

Appointee

William Wilberforce

Benefit

Universal Credit

[H1] Jamie Rees
QQ123456C

[Button] Edit

[Transition agreed.](#)

Arrange for mortgage interest benefit payments to be converted to a [loan from X date.](#)

Charge [form](#) returned

[15 July 2017](#)

[Homeowner](#) agreed to charge

Loan agreement returned

26 June 2017

Charge [form](#) sent

10 June 2017

Loan agreement sent

10 June 2017

Contacted by information provider

1 June 2017

Homeowner agreed to loan

[Homeowner's](#) details sent to letter provider [and](#) information provider
12 May 2017

Date of birth

24 January 1987

	<div>Address</div> <div>1 The Street</div> <div>Kingston-upon-Hull</div> <div>KD12 9FT</div> <div>Phone number</div> <div>0777 555 008</div> <div>Appointee</div> <div>William Wilberforce</div> <div>Benefit</div> <div>Universal Credit</div>
--	---

<div><div>SMITS</div><div>Engelbert Humperdinck</div></div> <div><div>Search</div><div>Upload data Create a tranche</div></div> <div><div><div><div>Megan Davies</div><div>GB654321C</div><div><div>Edit</div></div></div><div><div>This person has not yet made a decision about the loan.</div></div><div><div><div>Details sent to letter provider & information provider</div><div>Thursday, 12th May 2017</div></div></div></div><div><div><div>Date of birth</div><div>10th June 1985</div></div><div><div>Address</div><div>1 The Street Kingston-upon-hull KD12 9FT</div></div><div><div>Phone number</div><div>0777 555 008</div></div><div><div>Benefit</div><div>Job Seekers Allowance</div></div></div></div>	<div>Megan Davies</div> <div>QQ122334C</div> <div>No decision made.</div> <div>Details sent to letter provider and information provider</div> <div>12 May 2017</div>
---	--

Search

[Upload data](#) | [Create a tranche](#)**Robbie Roberts**

ZZ918273C

Edit

Date of birth

16th October 1992

AddressFlat 1
Chambers St
Edinburgh
KD12 9FT**Phone number**

0777 555 008

Benefit

Universal Credit

This person does not wish to proceed with a loan, please arrange for Mortgage Interest payments to cease on 'A' day.

Contacted by information provider

Thursday, 7th June 2017

Does not wish to proceed

Contacted by information provider

Thursday, 1st June 2017

No response - message left on voicemail

Details sent to letter provider & information provider

Thursday, 12th May 2017

Robbie Roberts

QQ122334C

Transition declined.

Arrange for mortgage interest benefit payments to stop on X date.

Contacted by information provider

7 June 2017

Doesn't want to transition

Contacted by information provider

1 June 2017

No response - message left on voicemail

Homeowner's details sent to letter provider and information provider

12 May 2017

Search

[Upload data](#) | [Create a tranche](#)

Jamie Rees

QQ123456C

[◀ Back](#)

Update Status

Status

 ▼

Date

Day Month Year

Link to Loan Agreement

Link to Charge Document

Jamie Rees
QQ123456C

Update [status](#)

Status

Date

Day Month Year

[Button] [Save and continue](#)

<div><div>SMITS</div><div>Engelbert Humperdinck</div></div> <div><div>Search</div><div>Upload data Create a tranche</div></div> <div><div>Upload data</div><div><div>Choose a file</div><div>Choose a file</div></div><div><div>Upload</div></div><div></div></div> <td data-bbox="1111 199 2045 715"><div>[no change]</div></td>	<div>[no change]</div>
---	------------------------

Search

[Upload data](#) | [Create a tranche](#)

Create a tranche

 people

on these benefits

☐ Pension Credit☐ Income Support☐ Job Seekers Allowance☐ Universal Credit☐ Employment Support
Allowance[Check tranche](#)

[H1] Create [cohort](#)

How many people do you want to select?

Which benefit should they be receiving?

Pension Credit

Income Support

Job Seekers Allowance

Universal Credit

Employment Support Allowance

[Button] [Continue](#)

<div><div>SMITS</div><div>Engelbert Humperdinck</div></div> <div><div>Search</div><div>Upload data Create a tranche</div></div> <div><h3>Create a tranche</h3><div><div><div>5000</div>people</div><div>365 people found.</div></div><div><div>on these benefits</div><div><div><input checked="" type="checkbox"/> Pension Credit</div><div><input type="checkbox"/> Income Support</div><div><input type="checkbox"/> Job Seekers Allowance</div><div><input type="checkbox"/> Universal Credit</div><div><input type="checkbox"/> Employment Support Allowance</div></div></div><div><div>Tranche name</div><div>tranche_13042017</div></div><div><div>Create this tranche</div></div><div><div>Update tranche</div></div></div> <div></div>	<div>[H1] Find a cohort</div> <div>How many people do you want to find?</div> <div>Which benefit should they be receiving?</div> <div>Pension Credit</div> <div>Income Support</div> <div>Job Seekers Allowance</div> <div>Universal Credit</div> <div>Employment Support Allowance</div> <div>[Button] Update cohort</div> <div>365 people found</div> <div>Cohort name</div> <div>cohort_13042017</div> <div>[Button] Save</div> <div>Q: I'm not entirely happy about 'cohort' but it's a little more accurate than tranche for describing people. Can we discuss what admins will do with this - is it just about sending out letters?</div>
---	---

SMITS

Engelbert Humperdinck

Search

[Upload data](#) | [Create a tranche](#)

Tranche created

Tranches

name	created by	letter provider	information provider
tranche_12112017	Marjory Fillibuster	data file	data file
tranche_23072017	Engelbert Humperdinck	data file	data file
tranche_12082017	Engelbert Humperdinck	data file	data file

Cohort created

[H1]Cohorts

Name

Created by

Letter provider data

Information provider data

cohort_12112017

Marjory Fillibuster

data file

data file

cohort_23072017

Engelbert Humperdinck

data file

cohort_12082017

Engelbert Humperdinck

data file

SMITS

Engelbert Humperdinck

Search

[Upload data](#) | [Create a tranche](#)

Upload data

The file you uploaded was not a proper CSV file

Try again or choose a different file

Choose a file

Choose a file

Upload

no change

SMITS

Engelbert Humperdinck

Search

[Upload data](#) | [Create a tranche](#)

Upload complete

Uploaded	By	New	Updated	Errors	Reports
25th June 2017	Marjory Fillibuster	300	100	0	download report file
4th May 2017	Engelbert Humperdinck	2120	140	30	download report file
12th April 2017	Engelbert Humperdinck	2384	394	15	download report file

change dates - no 'th'

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