

Co-design session

Training Fund Reimbursement Service

November 2023

Agenda

1. About the session (5 mins)
2. Introductions and icebreaker (10 mins)
3. Design discussion (60 mins)
4. Summary (10 mins)
5. Wrap up and next steps (5 mins)

Hello, we are



Nick Johnstone-Waddell



Mark Portnell

Project background: People at the Heart of Care White Paper

Minister of State for Social Care:

I want to support care workers to develop their skills and their careers, and to be recognised for those skills.

That's why we are setting out our plan for the care workforce, including the care workforce pathway, a new Care Certificate qualification, **funded training for care workers and registered managers, and funded continued professional development training**, as well as a digital skills passport.

Our plan will help care workers pursue their careers and get the professional recognition they deserve.

What is co-design?

Co-design is simply an approach to design that actively involves users early in the process.

It ensures that the end result is usable and meets their needs.

Rules for the session

Everyone's opinions are valid.

There are no right or wrong answers.

Give everyone the chance to talk.

Introductions

- Your name
- Your role
- 3 words associated with you starting with the same letter



Terriers
(my dog Henry is one)



Taskmaster
(one of my favourite TV shows)



Travelling
(something I love to do)

What could this object be used for?

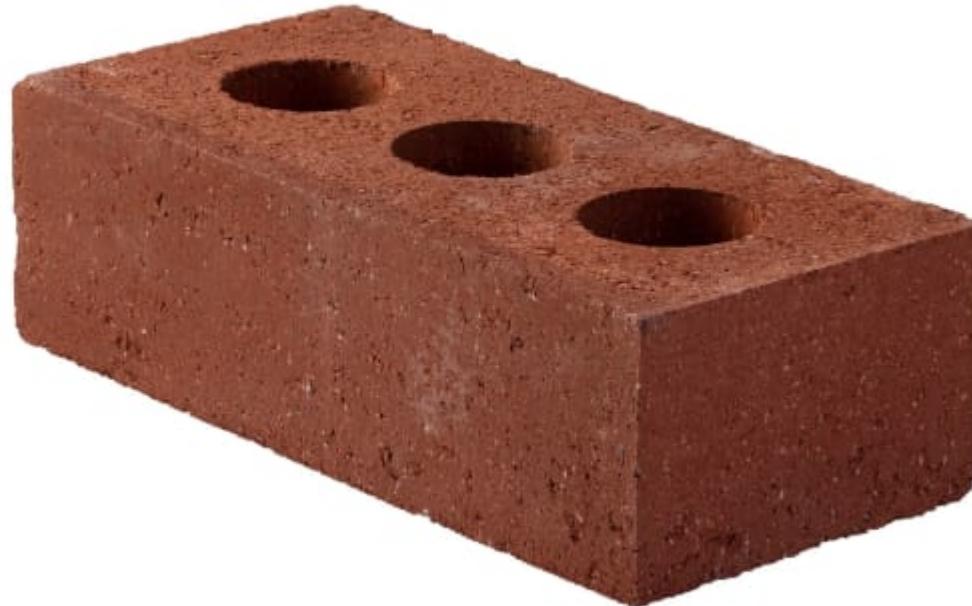


Some possibilities...

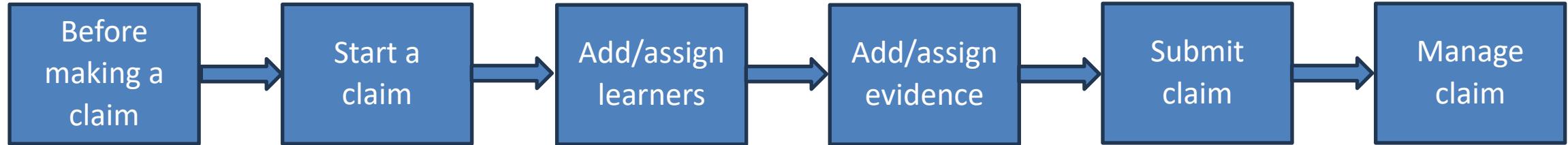


- **Hat for a Tea Party:** Use a large sieve as an avant-garde hat at a tea party.
- **Sandcastle Architect Tool:** Use the sieve to sift and scatter fine grains of sand for decorative patterns.
- **DIY Shower Head Filter:** Modify a sieve to act as a makeshift filter for a shower.
- **Bird Feeder:** Repurpose a sieve as a feeder for birds by filling it with birdseed.
- **Musical Instrument:** Play the sieve like a percussion instrument by tapping different parts with spoons or drumsticks.
- **Basketball Hoop:** Fix a sieve onto a pole or a wall and use it as a makeshift basketball hoop.
- **Pet Obstacle Course:** Incorporate sieves into a pet obstacle course where pets need to navigate around them for treats or toys.
- **Plant Pot:** Use a large sieve as a planter. Fill it with soil and plant small succulents or herbs.
- **Art Project:** Create an art installation using various sizes of sieves, arranging them in an abstract pattern.
- **Gardening Tool:** Use a sieve to sift soil, separating fine particles from debris or rocks when preparing soil for planting or potting.

Now your turn



Designs



Questions

1. What are your overall expectations around making a claim?
2. Are you likely to finish a claim in one go or would you start it and want to come back to it later?
3. Could there be multiple people involved in submitting claims?

Before you begin

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Scelerisque eu ultrices vitae auctor. Id diam vel quam elementum pulvinar etiam non quam lacus. In aliquam sem fringilla ut morbi tincidunt augue. In massa tempor nec feugiat nisl pretium.

What you'll need to submit a claim

- Learner Details

Who completed the L&D activity, this will determine what activities they are eligible for

- L&D Activity Details

Details of the L&D activity, details required will depend on the type of activity

- Evidence of payment

e.g. invoices, receipts etc.

- Evidence of enrolment

For certain courses you'll need to provide evidence of the learner enrolled

- Evidence of completion

For certain L&D activities you'll need to provide evidence that the learner completed the courses

How would you like to start your claim?

Learners

Start with learners when:

- Point 1
- Point 2
- Point 3

Start with learners →

L&D Activity

Start with L&D activity when:

- Point 1
- Point 2
- Point 3

Start with L&D activity →

Before you begin

Aim

To allow submitters to start a new claim and tell them what they'll need so they can be prepared.

Questions

1. Who do you think will be submitting claims in your organisation?
2. What do you think the triggers for starting a claim would be?
3. What would you want to know before you start?

Claim #132

[Overview](#)[Add learner](#)[Add L&D activity](#)[Add evidence](#)

Learners

Arrange by

Learner ▾

L&D Activity

Evidence	Evidence					
	Learner	L&D Activity	Payment	Enrollment	Completion	RAG
Learner 1	Course 1	Receipt 1	N/A	Cert 1		Ready
	Course 2	Assign Evidence	N/A	Cert 2		Missing evidence
	Course 3	Assign Evidence	List 1	Assign Evidence		Missing evidence
Learner 2	Course 1	Receipt 1	N/A	Cert 5		Ready
Learner 3	Course 1	Receipt 1	N/A	Cert 6		Ready
	Course 3	Assign Evidence	List 1	Assign Evidence		Missing evidence
Learner 4	Course 1	Receipt 1	N/A	Cert 7		Ready
	Course 3	Assign Evidence	List 1	Assign Evidence		Missing evidence
Learner 5	Course 1	Receipt 1	N/A	Cert 8		Ready
	Course 1	Receipt 1	N/A	Cert 9		Ready

[Submit ready learner activities](#)[Submit claim](#)

Adding detail to a claim

Aim

To allow submitters to create a reimbursement claim by bringing together learners, activities and evidence.

Questions

1. What is a 'claim' to you?
2. How would you expect to manage everything that needs to be added to a claim in an easy way (multiple learners, courses and pieces of evidence)?
3. How can we make it easy for you to re-use information from past claims?

Add evidence

Type of evidence

Payment

Upload File

I have a digital piece of evidence

I want to request evidence from a colleague

Evidence of payment checklist

To maximise the chances of getting your claim approved your evidence of payment should contain:

- Thing 1
- Thing 2
- Thing 3
- Thing 4

Add evidence

Add evidence

Aim

To allow submitters to upload evidence (for payment, enrollment or completion) in preparation for assigning it to a claim.

Questions

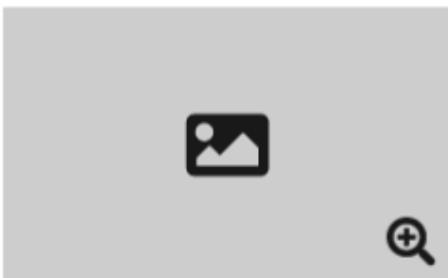
1. What types of evidence could there be?
2. Will they all be digital, or could some be in physical form?
3. Will the submitter have access to the evidence, or could it be that the learners would be best placed to provide it?

Assign evidence

Type of evidence:

Payment

File preview:



Learner L&D activity

Cell A Cell B

Assign evidence

Assign evidence

Aim

To allow submitters to assign evidence to a claim once it's been uploaded.

Questions

1. Is the evidence likely to be per learner or could it be per course?
2. How would you expect the process of assigning evidence to work?

Who is the claim for?

 Search for learner Filter

New Starters

Managers

<input checked="" type="checkbox"/> Learner	Role	Eligibility
<input checked="" type="checkbox"/> Name 1	Role 1	CPD
<input checked="" type="checkbox"/> Name 2	Role 2	CPD
<input checked="" type="checkbox"/> Name 3	Role 3	CPD
<input checked="" type="checkbox"/> Name 4	Role 4	CPD
<input checked="" type="checkbox"/> Name 5	Role 5	CPD

 Add new learner Assign learners to claim

Assign learners

Aim

To allow submitters to assign learners to a claim.

Questions

1. Would you expect to have to assign learners if the training cost was fixed price?
2. How would you like to assign learners if there are lots of them?

Org Name

[Edit Details](#)[Start a new claim](#)[Overview](#)[Notifications !\[\]\(eec44b55fcb53be17d8251e3a4971e0b_img.jpg\)](#)[Claims](#)[Learners](#)[Evidence](#)[Account Management](#)

Notifications

- ✓ Claim #12 Approved
- ! Claim #31 returned with errors
- ✓ Claim #46 payment processed

[View all notifications](#)

Claims in progress

Claim #45
4 missing items

[Continue claim](#)

Claim #09
12 missing items

[Continue claim](#)

Claim #87
7 missing items

[Continue claim](#)

Dashboard

Aim

To provide a single place for users to see an overview of claims for their organisation and any actions they have.

Questions

1. Who do you think would need access to the dashboard?
2. Would different types of users need to see different information?
3. How would you expect to resolve queries/errors in submissions?
4. Would you like to be able to track reimbursement by individual member of staff?
5. Would you value reminders about spending the full TFRS budget?

Summary

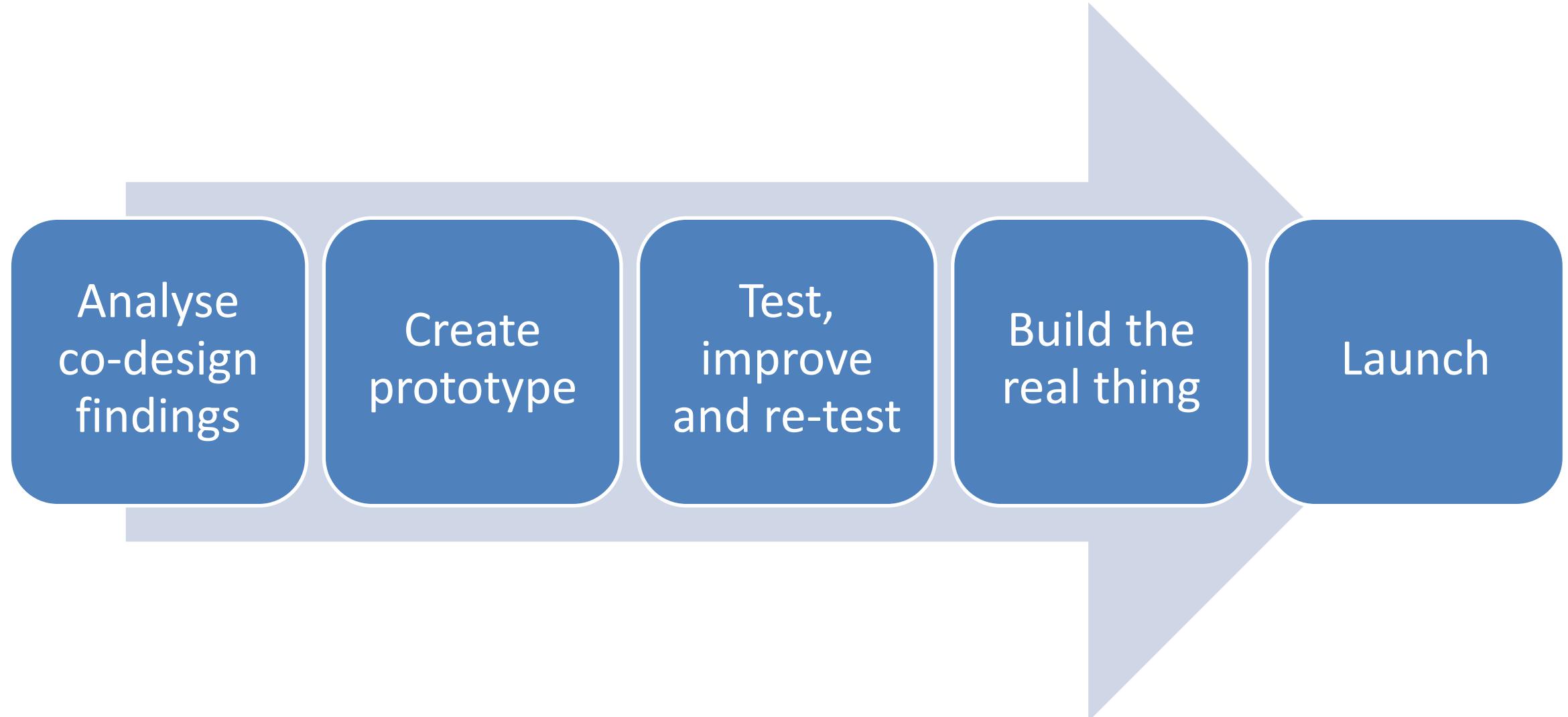
What we've heard from you today is...

The challenges seem to be...

The opportunities are...

Does that sound right?

Next steps





Business Services Authority

Thank you!