

User Research Playback #4

Training Fund Reimbursement Scheme

James Lubwama & Amelia Benson

January 2023

Background

Research aims

- This was our fourth round of user research, and our third round of usability testing. We'd made a number of revisions to the prototype and wanted to see whether users found the updated version more intuitive to use.
- In particular, we wanted to interrogate the new 'claim scaffold' approach, as well as the ability to add learners onto the system.
- We also wanted to get feedback on the service name. We had 4 contenders which we asked all of our participants to rank in order of preference.

What we did

- We spoke to 8 people as part of this round of user research. All of these sessions were conducted over MS Teams.
- The Teams calls were an hour long. After gathering some background information (device being used, digital literacy, organisation size) we shared the link to the prototype and asked participants to complete the 3 tasks.
- Tasks were shared in advance of the meeting. We deliberately kept assistance to a minimum, only offering help if they asked or it seemed unlikely they could resolve an issue by themselves.
- At the end of each session, we asked participants to rank 4 possible service names.

<p>d so</p> <ul style="list-style-type: none"> Two people expressed concerns around some of the language concerning "non-registered" staff. Echoing a few comments we heard during the mini-discovery, there is a sense for some that non-registered ASC staff are seen second-class citizens, and that the term "non-registered" elicits that feeling. Overall the reception to this page was very positive - it was described as clear, simple, easy to understand - although several people did later on ask follow-up questions which suggested that the pages perhaps lack a bit of detail. People may have been swayed slightly by the familiar GOV.UK style, which has become synonymous with ease and simplicity. People didn't make much of a point of there being 2 separate funding streams. We may need to reconsider whether it's important to make this distinction at this stage, and if it is, if there may be ways of making the distinction more prominent. People understood the eligibility criteria presented here, although we did receive a few follow-up questions (mentioned later) that suggest it's not sufficiently detailed. Not all users scrolled down, leading some to miss links to related content. Most did scroll though. 	<p>t re i s ht at ell</p> <ul style="list-style-type: none"> A couple of users suggested they might use this table to find suitable / high-quality courses, and not just for checking the eligibility of courses they'd already decided on / procured. This reflects wider issues in the industry with identifying high quality training, something many providers struggle with. The filters were seen as very important, and it seems likely that more will be needed to whittle down courses in the list. In terms of what else could be used: online v f2f; location; course level/qualification; duration are all possibilities. A few participants remarked on the lack of transparency in terms of where the eligible course data has come from. A few users mentioned the lack of a back button. 	<p>There was some uncertainty regarding which staff members are eligible. For example, international staff and non-care staff. We might need to be more explicit about this.</p>	<ul style="list-style-type: none"> Generally positive, people broadly understood what they were being shown. Claim items language - this caused considerable confusion for some. Some participants thought that the claim would be by individual (i.e. one person is one claim, with multiple instances being claim items). Others felt that it was based on the date of submission (i.e. a claim was a group of claim items submitted at the same time, regardless of who the learner was). Where people said that the claim was by learner, this may be based on how the information on page was presented - by learner. tabs / buckets were helpful, only one user seemed to struggle with this, not realising that the categories were mutually exclusive, i.e. a claim item could not have 2 or more of these statuses simultaneously. search bar evidence button 	<ul style="list-style-type: none"> People seemed to grasp pretty quickly what 'add claim by event' meant. One user questioned why it says 'by event' and not 'by L&D activity', the terminology we use elsewhere. Being able to add multiple learners to an activity/event was seen as critical by many, particularly those working for large providers with centralised L&D / admin teams. 	<p>Generally lacking, this page isn't well received, but there were a few issues raised:</p> <ul style="list-style-type: none"> Designers had originally intended that staff members had known more about their work than was suggested that adding EORL would raise another issue, and that this was a key reason for this. Payroll/HMRC: a couple of users suggested allowing people to input their payroll number directly into the system in order to avoid duplication, although this would bring with it its own challenges in terms of how to validate and spotcheck whether it would even be allowed, wondering whether HMRC restrictions might affect this. Very interesting suggestion about a personal number carrying like a passport number into another external system, perhaps links to a wider theme of GPPN, anyway. People did comment to understand that the ID numbers were created by one system, and that didn't really solve the duplication problem. 	<p>Not much to say here other than again the issue around TU terminology crops up and perhaps we need to question whether we need to present this distinction to the user at all.</p>	<p>Also a question around Personal Assistants, who are not mentioned in the eligibility screen.</p>	

Task 1

Task 1

The care provider you work for has booked 4 members of staff onto a training course to improve their knowledge around dementia.

Course code: A1B2C3

Course name: Introduction to dementia care

Course date: 12 December 2023

Cost: £600 in total (£150 each)

You will need to search for each learner to see if they already exist in the system. If you cannot find their record, you will need to add them to the system.

Learners:

Learner 1

National Insurance number: LE 09 5F 94 M

Full name: Roy Kub

Job title: Caregiver

Role type: Direct care

Learner 2

National Insurance number: OB 78 2F 15 O

Full name: Malinda Mayer

Job title: Caregiver

Role type: Direct care

Learner 3

National Insurance number: AG 22 5F 78 K

Full name: Parvinder Patel

Job title: Caregiver

Role type: Direct care

Learner 4

National Insurance number: KZ 79 0F 13 Z

Full name: Aron Effertz-Stroman

Job title: Caregiver

Role type: Direct care

Start page

- In general, there wasn't much attention paid to the Start page this time, in contrast to the previous two rounds of research.
- There was some confusion around terminology, particularly registered vs non-registered staff. It was seen as slightly odd, or counter-intuitive, that 'registered managers' would fall under the non-registered subheading.

 GOV.UK

ALPHA This is a new service – your [feedback](#) will help us to improve it.

Service name goes here

Care providers and local authorities in England can use this service to get reimbursed for the costs of learning and development for staff working in adult social care.

1. Find a relevant training course, qualification or revalidation activity using our [eligibility checker](#).
2. Book the course or qualification directly with the provider (you cannot book using this service).
3. Claim back the cost using this service.

There are 2 types of funding:

Non-registered professionals

You can claim the costs of training courses and qualifications for upskilling staff who provide direct care and are not registered with a professional body.

This funding also covers registered managers, including aspiring managers who are working towards registration.

Registered professionals

You can claim the costs of activities relating to professional revalidation (renewal of a registration) for:

- nurses registered with the Nursing and Midwifery Council (NMC)
- allied health professionals registered with the Health & Care Professions Council (HCP)

[Start now >](#)

Before you start

You must have an up to date [Adult Social Care Workforce Data Set](#) account for your organisation.

You'll also need to have an account to use this reimbursement service. You can [register for one](#) if you need to.

To make a claim you'll need to check that the course or activity and members of staff are [eligible](#).

You'll need to be able to enter:

- the details of the people who completed the activity
- what the activity was
- evidence relating to the activity

Evidence will be required of payment for the activity, for example an invoice. For training courses and qualifications, evidence of completing the course will be required. For qualifications, evidence of enrolment will also be needed.

You will not need to enter all the information in one go. You can start a claim and then return to complete missing information later.

If you need help using this service

Watch some [short videos](#) demonstrating different parts of the service. You can also get in touch with the NHS Business Services Authority contact centre:

Email: xxxx@bsa.nhs.uk
Phone: 01234 567890

 Clear data

 OGI All content is available under the [Open Government Licence v3.0](#), except where otherwise stated



Non-registered professionals

You can claim the costs of training courses and qualifications for upskilling staff who provide direct care and are not registered with a professional body.

This funding also covers registered managers, including aspiring managers who are working towards registration.

Registered professionals

You can claim the costs of activities relating to professional revalidation (renewal of a registration) for:

- nurses registered with the Nursing and Midwifery Council (NMC)
- allied health professionals registered with the Health & Care Professions Council (HCPC)

Start now >

Manage claims

- Overall, feedback for this page was largely positive. People generally understood what the tabs contained.
- There was some minor confusion about the difference between 'Incomplete' and 'Ready to Submit'.
- There was also some initial confusion around what the rows in the table were showing. Some thought it was a list of courses, which they could then go into to add learners, evidence etc. These users eventually realised that the rows represented unique claims.

GOV.UK

Organisation details Your account Sign out

ALPHA This is a new service – your [feedback](#) will help us to improve it.

Home > Manage claims (non-registered professionals)

Non-registered professionals

Manage claims

Start a new claim

Incomplete (26) Ready to submit (13) Submitted (76) Queried (26) Paid (60)

Incomplete (26)

Show filters

Claim reference number	Activity name	Start date	Learners	Created date
120263	Introduction to Dementia Care	23 Aug 2023	5 learners	13 Nov 2023
410763	Managing Challenging Behaviors	30 Aug 2023	9 learners	22 Sept 2023
273497	Preventing Elder Abuse	16 Jan 2023	1 learners	17 Sept 2023
427918	Understanding Autism Spectrum Disorders	4 May 2023	4 learners	13 Sept 2023
109594	Supporting LGBTQ+ Individuals in Care	7 Aug 2023	5 learners	13 Sept 2023
260932	Effective Conflict Resolution in Mental Health Care	29 Aug 2023	10 learners	6 Jul 2023
204647	Preventing Workplace Bullying in Care	10 Jul 2023	8 learners	9 Jun 2023
350530	Equality and Diversity in Care	29 Aug 2023	3 learners	26 Apr 2023
932641	Crisis Intervention in Mental Health	22 Jan 2023	7 learners	25 Apr 2023
461112	End-of-Life Care	11 Sept 2023	2 learners	18 Mar 2023
747468	Understanding Autism Spectrum Disorders	6 Nov 2023	3 learners	5 Mar 2023

1 2 3 ... Next >

Showing 1 to 10 of 26 claims

[Clear data](#)
OGL All content is available under the [Open Government Licence v3.0](#), except where otherwise stated



Manage claims (continued)

- There were also some struggles, upon loading the page, getting oriented and working out exactly what was going on. This may partly be a result of the dummy data, which didn't mean anything to our participants. However, people seemed comfortable with the layout once they understood what was being shown.
- A couple of the users struggled to see the 'Show filter' button. A couple of people also struggled to see the green 'Start a new claim' button.
- A few users wanted to look/search for learners first, prior to starting a claim (although this isn't possible in the current prototype). This may be because the task asked them to add some learners already in the system and add one who wasn't.

ALPHA This is a new service – your [feedback](#) will help us to improve it.

[Home](#) > Manage claims (non-registered professionals)

Non-registered professionals

Manage claims

[Start a new claim](#)

Incomplete (26)				
Show filters				
Claim reference number	Activity name	Start date	Learners	Created date
120263	Introduction to Dementia Care	23 Aug 2023	▶ 5 learners	13 Nov 2023
410763	Managing Challenging Behaviors	30 Aug 2023	▶ 9 learners	22 Sept 2023
273497	Preventing Elder Abuse	16 Jan 2023	▶ 1 learners	17 Sept 2023
427918	Understanding Autism Spectrum Disorders	4 May 2023	▶ 4 learners	13 Sept 2023
109594	Supporting LGBTQ+ Individuals in Care	7 Aug 2023	▶ 5 learners	13 Sept 2023
260932	Effective Conflict Resolution in Mental Health Care	29 Aug 2023	▶ 10 learners	6 Jul 2023
204647	Preventing Workplace Bullying in Care	10 Jul 2023	▶ 8 learners	9 Jun 2023
350530	Equality and Diversity in Care	29 Aug 2023	▶ 3 learners	26 Apr 2023
932641	Crisis Intervention in Mental Health	22 Jan 2023	▶ 7 learners	25 Apr 2023
461112	End-of-Life Care	11 Sept 2023	▶ 2 learners	18 Mar 2023
747468	Understanding Autism Spectrum Disorders	6 Nov 2023	▶ 3 learners	5 Mar 2023

1 2 3 ... [Next >](#)

Showing 1 to 10 of 26 claims

[Clear data](#)

OCL All content is available under the [Open Government Licence v3.0](#), except where otherwise stated



Claim overview

- This page represented the biggest departure from the previous iteration of the prototype, but the feedback was generally positive.
- One user was initially confused by the 'Incomplete' statuses. To them it suggested that this was a claim already started/in progress, which made them think this was not where they were supposed to be.

The screenshot shows a 'Claim overview' page on the GOV.UK website. The top navigation bar includes the GOV.UK logo, 'Organisation details', 'Your account', and 'Sign out'. A blue banner at the top right says 'ALPHA This is a new service – your [feedback](#) will help us to improve it.' The main content area starts with 'Claim: 963866'. Below it is a 'Claim Summary' section with fields for 'Status' (NEW), 'Created on' (9 January 2024), and 'Created by' (Test Participant). To the right, there are links to 'Get help with your claim' (with links to evidence requirements and eligibility requirements). The next section is 'Course', with fields for 'Name' (INCOMPLETE) and 'Start date' (INCOMPLETE), both with 'Select course' and 'Add start date' buttons. The 'Learners' section shows one learner with an INCOMPLETE status and a 'Add learner' button. The 'Cost' section shows cost per learner and evidence of payment, both with INCOMPLETE statuses and 'Add cost' and 'Add evidence' buttons. Below these is a 'Supporting notes' section with an 'Add note' button. The 'What happens next' section contains a note about submitting the claim if all information is correct. At the bottom are 'Submit claim' and 'Save and finish later' buttons, along with links to manage the prototype and clear data. The footer includes the OGL (Open Government Licence v3.0) and the Royal Coat of Arms.

Select course

- Users searched by a mix of course ID and course name. However, this may have been a quirk of the task itself and the details provided. It seems unlikely a user would actually have the course ID to hand when using the service.
- Otherwise, there were no issues on this page. This is quite an improvement on the previous iteration, where people would have to search for the claim, then view details, and then add to their claim. Now they can add a course to the claim directly from this page, which seems to have made things more straightforward.

GOV.UK

Organisation details Your account Sign out

ALPHA This is a new service – your [feedback](#) will help us to improve it.

< Back

Claim Reference Number: 202693

Select course

Select the training course or qualification you are claiming for.

Search for course

You can search by course name or code

dementia

Search

Search results

Course code	Course name	Awarding organisation	
A1B2C3	Introduction to Dementia Care	OCN London	Add to claim View details

[Clear data](#)

OGL All content is available under the [Open Government Licence v3.0](#), except where otherwise stated

© Crown copyright

Select learners

- Like adding courses, this page has also changed in as much as users are now able to add learners without viewing more in-depth learner details. As with the course options, this reduced confusion.
- Overall, users found it very straightforward adding learners. There were only a few minor issues encountered:
 - It is currently only possible to add new learners to the system after an unsuccessful search for a learner.
 - One or two participants did not initially see the option to add a new learner that appeared under the search field.

GOV.UK

Organisation details Your account Sign out

ALPHA This is a new service – your [feedback](#) will help us to improve it.

< Back

Claim Reference Number: 963866

Select learners

Select the members of staff who attended this training.

Search for a person

You can search by a person's name or national insurance number

Search results

No matches returned for your search: "Parvinder". This may mean they do not exist in the service. Do you want to [add new learner](#)?

[Manage your prototype](#) [Clear data](#)

OGL All content is available under the [Open Government Licence v3.0](#), except where otherwise stated

© Crown copyright

Select learners (continued)

- We still have a few open questions about how exactly users will interact with this service.
- For example, would an organisation add all their learners immediately to make subsequent claim-making easier, or would they do it on an ad-hoc basis, i.e. only add learners when a claim is being made on their behalf.
- It may depend on the size of the organisation, with larger providers preferring the latter approach to avoid entering many learners for whom a claim will never be made.

GOV.UK

Organisation details Your account Sign out

ALPHA This is a new service – your [feedback](#) will help us to improve it.

< Back

Claim Reference Number: 963866

Select learners

Select the members of staff who attended this training.

Search for a person

You can search by a person's name or national insurance number

Search

Search results

National Insurance number	Full name	Job title	Role	
OB 78 2F 15 O	Malinda Mayer	Caregiver	Direct care	<button>Add to claim</button>
LM 89 7F 48 J	Florencio Halvorson	Healthcare Assistant	Direct care	<button>Add to claim</button>
WU 23 OF 97 M	Allison Wolff	Occupational Therapist	Allied health professional	<button>Add to claim</button>
BF 74 OF 46 L	Salvador Weber	Personal Assistant	Non-regulated direct care	<button>Add to claim</button>
AL 82 2F 62 C	Amalia Rodriguez	Municipal Caregiver	Local authority direct care	<button>Add to claim</button>

[Manage your prototype](#) [Clear data](#)

OGL All content is available under the [Open Government Licence v3.0](#), except where otherwise stated


© Crown copyright

New learner details

- This page tested well, although it is important to take into account the testing scenarios we provided. In the tasks we provided job title and role groups, which meant users didn't engage with these categories as they might when using the live service.
- We had several conversations about the role groups in particular, and it seems there may still be work to do here. The categories are not mutually exclusive, and it is not always clear which option is the correct one.
- With job title, one issue cropped up, albeit infrequently: what to enter when a learner fulfils multiple roles for the provider? By and large the solution to this was seen as straightforward: enter the learner's 'main' role, the one they do most of the time.

GOV.UK
Organisation details Your account Sign out

ALPHA This is a new service – your [feedback](#) will help us to improve it.
[Back](#)

Claim: 963866
New learner details

Full name
Their full name as it would appear on a completion certificate.

National Insurance number
For example, 'QQ 12 34 56 C'.

[Why do we need this?](#)

Job title

Role group
Select one option

Permanent nurse
Nurses in a long-term position that is secured by a contract.

Temporary nurse
Nurses employed on temporary/short-term fixed contracts.

Bank registered nurse
Nurses who provide cover to cover planned or unplanned workforce shortfalls (e.g. sickness absence, vacancies, annual or maternity leave).

Allied health professional
Allied health professionals supporting health social care/mental health care in settings such as hospitals, schools, care homes, prisons etc.

Agency staff
Care employees brought in by care providers on short-term contracts to help with periods of short staffing. Require qualifications and competencies to deliver specific roles.

Non-regulated managerial
Manager in a non-regulated setting.

Non-regulated direct care
e.g. Personal Assistant

Personal assistants
Someone employed to provide personal and domestic everyday support needed to help people to lead an independent personal and social life at home.

Direct care
Someone who delivers direct intimate care in any care setting.

Local authority direct care
Someone who delivers direct intimate care in a local authority setting.

What happens next
The new learner will be added to the claim. They will also be available to add to future claims.

[Save and add to claim](#)

Manage your prototype Clear data
© Crown copyright

Add cost (per learner)

- No major issues here, although it did become apparent that cost per learner may not always be the ideal way of entering the total cost of the course.
- This is because there are times when a course is procured for a fixed fee but the number of people who will attend is (within a range) fluid. For example, a course may be £700, but it could be attended by 6, 7, or 8 people. The cost per learner would change with every learner added or removed.

The screenshot shows a GOV.UK page with a black header containing the GOV.UK logo, 'GOV.UK', 'Organisation details', 'Your account', and 'Sign out'. A blue banner at the top says 'ALPHA This is a new service – your [feedback](#) will help us to improve it.' Below this is a back navigation link '[Back](#)'. The main content area has a claim reference number '202693' and a section titled 'Add cost'. It asks for the 'Cost per learner' and shows a field with the value '£ 150'. A green button labeled 'Add to claim' is below the field. At the bottom, there is a 'Clear data' link and a note from 'OGL' stating 'All content is available under the [Open Government Licence v3.0](#), except where otherwise stated'.

Add evidence of payment

- There were no real problems on this page, although it wasn't our main focus.
- One participant did say that they would struggle to obtain certificates as they don't store them centrally. This runs slightly counter to most people we've spoken to so far, where getting hold of certificates has never been mentioned as a barrier.
- Going on previous rounds, there is probably still more work required here to understand:
 - what evidence people think they'll need to upload
 - how they intend to keep track of what's been submitted
 - what is still required when they've only partially submitted evidence
 - how the BSA will assess that evidence

ALPHA This is a new service – your [feedback](#) will help us to improve it.

⟨ Back

Claim Reference Number: 202693

Add evidence of payment

You need to upload a file containing the evidence of payment . This could be a PDF or image file.

If you need to add an email as evidence, save the email as a PDF file and then upload that.

Upload a file

No file chosen

[Clear data](#)

 All content is available under the [Open Government Licence v3.0](#), except where otherwise stated

Partially complete claim overview

- By this stage people had figured out how to interact with the service and had successfully added all the necessary claim details (except for evidence).
- However, not everyone was clear at this point what the next stage was. Were they now ready to submit? Was there an extra step they didn't know about? Could they save their progress and return later?
- Nobody seemed to notice the ability to add supporting notes, nor were they sure what sort of information would need to be captured there.

GOV.UK Organisation details Your account Sign out

ALPHA This is a new service – your feedback will help us to improve it.

< Back

Claim: 130195

Claim Summary

Status	INCOMPLETE
Number of learners	5
Total cost	£3600
Total reimbursement	£4000
Created on	22 October 2023
Created by	Mara Monahan

Get help with your claim

[Find out more about evidence requirements](#)

[Find out more about eligibility requirements](#)

Course

Name	H214K6 Person-Centred Support for Autism	View	Change
Start date	6 January 2024	Change	

Learners

Matilde Hill BU 26 7F 00 Y	View learner details	Remove
Evidence of completion	INCOMPLETE	Add evidence

Casper Medhurst HE 5B 1F 8D U	View learner details	Remove
Evidence of completion	INCOMPLETE	Add evidence

Tania Macejkovic AJ 54 4F 011	View learner details	Remove
Evidence of completion	INCOMPLETE	Add evidence

Dilan Frami EB 06 4F 17Y	View learner details	Remove
Evidence of completion	INCOMPLETE	Add evidence

Jaylan Dooley FB 88 2F 39 Z	View learner details	Remove
Evidence of completion	INCOMPLETE	Add evidence

[Add another learner](#)

Cost

Cost per learner	£720	Change
Evidence of payment	INCOMPLETE	Add evidence

Supporting notes

[Add note](#)

What happens next

When you have added all the necessary information to this claim you can submit it for processing. Check that nothing is showing as 'Incomplete' and that you have added all the learners you need to.

If there is still information to add, you can save and finish the claim later.

By submitting this claim you are confirming that, to the best of your knowledge, the details you are providing are correct and that the learners were employed by your organisation when the course started.

[Submit claim](#) [Save and finish later](#)

Task 2

Task 2

The care provider you work for sent 4 members of staff onto a training course to improve their time management. You have previously started a claim for reimbursement for 3 of the members of staff but did not add the fourth person. You would now like to complete and submit the claim.

Claim ID: 542552

Learners already added: Aron Effertz-Stroman, Roy Kub, Malinda Mayer

Add the following learner and add their evidence of completion:

National Insurance number: ZX 51 9F 87 P

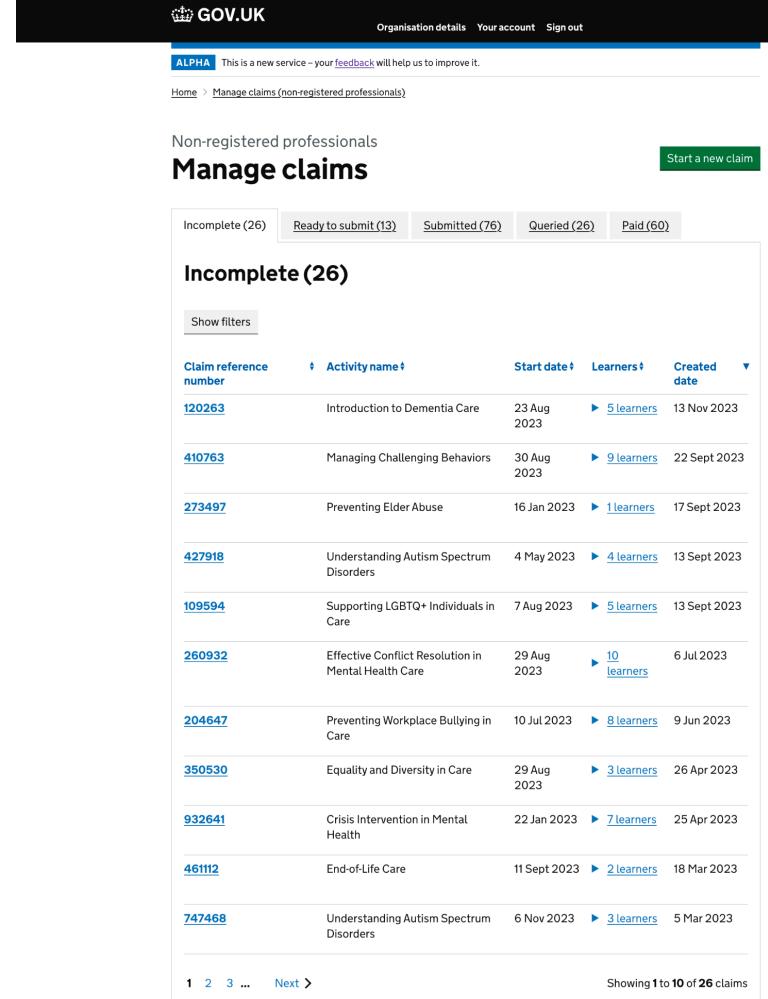
Full name: Casey Simonis

Job title: Caregiver

Role type: Direct care

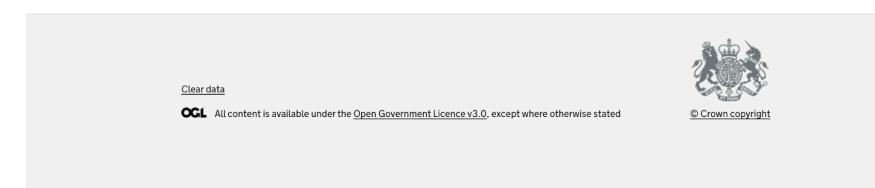
Task 2

- Several users opened status tabs to manually look for the claim in the tables.
- Some users looked in the "incomplete" tab first, as they believed that, as the claim had been started but not submitted, it would be "incomplete". These users checked the "ready to submit" tab only after confirming it was not in the "incomplete" tab.
- One user said: "*It's incomplete in my head because I've got to add someone. If it was ready to submit it would have everything there*".
- This suggests a lack of clarity around the "Ready to submit" status label.



The screenshot shows a web page titled 'GOV.UK' with a 'Non-registered professionals' header. A banner at the top says 'ALPHA This is a new service – your feedback will help us to improve it.' Below the header, a breadcrumb navigation shows 'Home > Manage claims (non-registered professionals)'. A 'Manage claims' button is visible. On the right, a 'Start a new claim' button is highlighted in green. Below the header, a navigation bar includes 'Incomplete (26)', 'Ready to submit (13)', 'Submitted (76)', 'Queried (26)', and 'Paid (60)'. The main content area is titled 'Incomplete (26)' and contains a table with 13 rows of data. The columns are 'Claim reference number', 'Activity name', 'Start date', 'Learners', and 'Created date'. Each row includes a link to the claim details and a 'learners' count. At the bottom of the table, there are pagination links '1 2 3 ... Next >' and a note 'Showing 1 to 10 of 26 claims'.

Claim reference number	Activity name	Start date	Learners	Created date
120263	Introduction to Dementia Care	23 Aug 2023	5 learners	13 Nov 2023
410763	Managing Challenging Behaviors	30 Aug 2023	9 learners	22 Sept 2023
273497	Preventing Elder Abuse	16 Jan 2023	1 learners	17 Sept 2023
427918	Understanding Autism Spectrum Disorders	4 May 2023	4 learners	13 Sept 2023
109594	Supporting LGBTQ+ Individuals in Care	7 Aug 2023	5 learners	13 Sept 2023
260932	Effective Conflict Resolution in Mental Health Care	29 Aug 2023	10 learners	6 Jul 2023
204647	Preventing Workplace Bullying in Care	10 Jul 2023	8 learners	9 Jun 2023
350530	Equality and Diversity in Care	29 Aug 2023	3 learners	26 Apr 2023
932641	Crisis Intervention in Mental Health	22 Jan 2023	7 learners	25 Apr 2023
461112	End-of-Life Care	11 Sept 2023	2 learners	18 Mar 2023
747468	Understanding Autism Spectrum Disorders	6 Nov 2023	3 learners	5 Mar 2023



Task 2

- In the status tabs, users had the option to click "Show filters". This would show them a search bar ("Keywords") and a selection of checkboxes, which they could use to filter the claims on the page.
- Users did not always immediately see the "Show filters" button and so were confused by the apparent lack of options to search and/or filter.
- The term "keywords" meant that some users were unsure if they could search by name or claim ID in this field.

The screenshot shows the GOV.UK website for managing claims for non-registered professionals. At the top right, there are links for 'GOV.UK', 'Organisation details', 'Your account', and 'Sign out'. A blue banner at the top says 'ALPHA This is a new service – your [feedback](#) will help us to improve it.' Below this, the page title is 'Manage claims (non-registered professionals)' with a 'Start a new claim' button. The main area shows a table of claims under the 'Incomplete' tab, with 26 items listed. To the left of the table is a 'Filter' sidebar with sections for 'Keywords' (a search bar), 'Start date' (checkboxes for months from March 2022 to January 2024), and 'Created date' (checkboxes for months from January 2023 to August 2023). The table columns include 'Claim reference number', 'Activity name', 'Start date', 'Learners', and 'Created date'. Each row in the table provides a link to the claim details, showing the activity name, start date, learner count, and creation date.

Claim reference number	Activity name	Start date	Learners	Created date
120263	Introduction to Dementia Care	23 Aug 2023	5 learners	13 Nov 2023
410763	Managing Challenging Behaviors	30 Aug 2023	9 learners	22 Sept 2023
273497	Preventing Elder Abuse	16 Jan 2023	1 learners	17 Sept 2023
427918	Understanding Autism Spectrum Disorders	4 May 2023	4 learners	13 Sept 2023
109594	Supporting LGBTQ+ Individuals in Care	7 Aug 2023	5 learners	13 Sept 2023
260932	Effective Conflict Resolution in Mental Health Care	29 Aug 2023	10 learners	6 Jul 2023
204647	Preventing Workplace Bullying in Care	10 Jul 2023	8 learners	9 Jun 2023
350530	Equality and Diversity in Care	29 Aug 2023	3 learners	26 Apr 2023
932641	Crisis Intervention in Mental Health	22 Jan 2023	7 learners	25 Apr 2023
461112	End-of-Life Care	11 Sept 2023	2 learners	18 Mar 2023
747468	Understanding Autism Spectrum Disorders	6 Nov 2023	3 learners	5 Mar 2023

1 2 3 ... Next > Showing 1 to 10 of 26 claims

Task 2

- The lack of a global search (i.e. across all tabs) also confused users, who expected to find a "search magnifying glass" icon to be able to search. When they could not find one immediately, they assumed they wouldn't be able to search at all.
- Users understood the pagination and tried to use this to find claims.
- Once the users had found the claim, they found it straightforward to add a new learner and submit, as this was the same as their earlier task.

The screenshot shows the GOV.UK website interface for managing claims. At the top, there's a banner for the 'ALPHA' service, stating it's a new service and encouraging user feedback. Below the banner, the page title is 'Non-registered professionals' and the section title is 'Manage claims'. A green button on the right says 'Start a new claim'. The main area displays a table of incomplete claims, with a total of 26 items. The table has columns for 'Claim reference number', 'Activity name', 'Start date', 'Learners', and 'Created date'. Each row contains a link to the claim details. On the left side of the table, there's a sidebar with filtering options: 'Keywords' (with an input field), 'Start date' (with checkboxes for months from March 2022 to January 2024), and 'Created date' (with checkboxes for months from January 2023 to August 2023). At the bottom of the table, there are navigation links for page numbers (1, 2, 3, ..., Next >) and a note indicating 'Showing 1 to 10 of 26 claims'.

Claim reference number	Activity name	Start date	Learners	Created date
120263	Introduction to Dementia Care	23 Aug 2023	5 learners	13 Nov 2023
410763	Managing Challenging Behaviors	30 Aug 2023	9 learners	22 Sept 2023
273497	Preventing Elder Abuse	16 Jan 2023	1 learners	17 Sept 2023
427918	Understanding Autism Spectrum Disorders	4 May 2023	4 learners	13 Sept 2023
109594	Supporting LGBTQ+ Individuals in Care	7 Aug 2023	5 learners	13 Sept 2023
260932	Effective Conflict Resolution in Mental Health Care	29 Aug 2023	10 learners	6 Jul 2023
204647	Preventing Workplace Bullying in Care	10 Jul 2023	8 learners	9 Jun 2023
350530	Equality and Diversity in Care	29 Aug 2023	3 learners	26 Apr 2023
932641	Crisis Intervention in Mental Health	22 Jan 2023	7 learners	25 Apr 2023
461112	End-of-Life Care	11 Sept 2023	2 learners	18 Mar 2023
747468	Understanding Autism Spectrum Disorders	6 Nov 2023	3 learners	5 Mar 2023

Task 3

Task 3

As part of your role, it's important for you to keep track of all claims made by the care provider you work for. You submitted 2 claims for training that took place in October 2023 and now want to find out if they've been paid.

Claim 1 was for a course relating to geriatric care.

Claim 2 was for a course attended by both Roy Kub and Malinda Mayer.

Task 3

- Like before, there were continuing issues with the lack of global search, with the majority of users identifying this as a challenge in finding these claims.
- Users found the filters useful once they were confident in how to use them. However, there was some confusion as to whether learner name could be searched for in "keywords". No users expected to be able to search by both names in the keyword search; once prompted, some felt that this could be useful.
- Interestingly, users did not seem to use the 'Queried' tab to search for claims. Users tended to search in 'Submitted' then 'Paid', or vice versa, without looking in the 'Queried' tab. When asked, users assumed that this was queried by the user, rather than by the BSA.

The screenshot shows the GOV.UK 'Manage claims' interface for non-registered professionals. At the top, there are links for 'Organisation details', 'Your account', and 'Sign out'. A notice says 'ALPHA This is a new service – your [feedback](#) will help us to improve it.' Below that, a breadcrumb navigation shows 'Home > Manage claims (non-registered professionals)'. The main area is titled 'Manage claims' with a 'Start a new claim' button. A navigation bar at the top right includes tabs for 'Incomplete (33)', 'Ready to submit (7)', 'Submitted (79)', 'Queried (25)', and 'Paid (59)' (which is highlighted). The 'Paid' section is titled 'Paid (59)' and contains a 'Hide Filter' button. On the left is a 'Filter' sidebar with 'Apply filters' and 'Keywords' input field containing '706486'. Below are two columns of filters: 'Start date' (checkboxes from January 1970 to January 2024) and 'Paid date' (checkboxes from January 1970 to January 2024). The main table lists one claim: 706486 for Advanced Geriatric Care, starting on 16 Dec 2023 and paid on 28 Nov 2023 for 4 learners. Navigation links 1, 2, 3, ..., Next > are shown, along with a note 'Showing 1 to 10 of 59 claims'.



Business Services Authority

Thank you!