

User Research Playback #2

Training Fund Reimbursement Scheme

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Background

Research aims

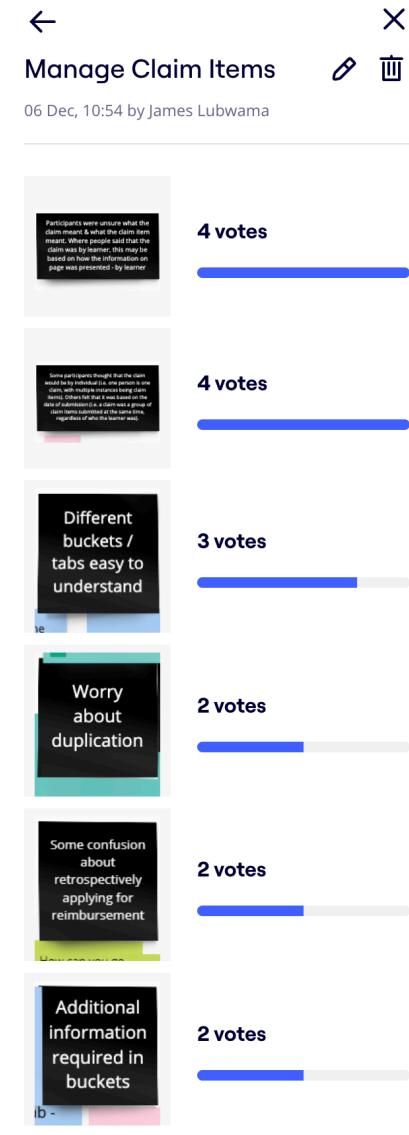
- Having completed our mini-discovery ([slidedeck here](#)) we now wanted to test the first iteration of our prototype, which would allow users to get an overview of their 'claim items' as well as submit a new claim item.
- We were keen to test some of the terminology we've adopted, such as 'claim items', 'learners' and 'L&D activity'.
- We also wanted to validate some of our findings from the mini-discovery, particularly around our users' mental models and how they would expect a service like this to operate.

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 45 minutes to an hour long and included a small introduction to the participant and their role, after which we showed participants the prototype and asked them for feedback.
- Recordings and transcripts for all the sessions (bar one) are available on [SharePoint](#).

Analysis

- Notes were taken on Miro by various team members. These notes later formed the basis of our analysis.
- Initially the team took part in a joint analysis session, after which Amelia and James continued to cluster sticky-notes by theme. Later the team took part in a dot-voting session to decide on the most important themes.
- Findings have been divided into two parts: those which are more general, and those which are specific to certain pages.



		Link to prototype Password: bsaasct123													
row 1	col 1														
row 2	col 2														
row 3	col 3														
row 4	col 4														
row 5	col 5														
row 6	col 6														
row 7	col 7														
row 8	col 8														
row 9	col 9														
row 10	col 10														
row 11	col 11														
row 12	col 12														
row 13	col 13														
row 14	col 14														
row 15	col 15														
row 16	col 16														

<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"> Design of the table makes it unclear that each row represents an individual learner. It was suggested that adding COID, inside name and other identifiers would help to clarify this. Payroll/HM scenario: 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 data protection and spending whether it would even be allowed, wondering whether HM scenario could affect the payroll number. Personal Assistants: People did seem to understand that the ID numbers listed are created by user systems, and that doesn'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>	

General insights

Overall the reception was very positive

- All in all, participants seemed to like the system and appreciate its simplicity.
- The system was viewed positively in comparison to existing systems such as the WDF and Skills for Care.
- People may have been swayed slightly by the familiar GOV.UK style, which has become synonymous with ease and simplicity.

"Most people would find it ... user friendly." P22

"Viewing the information is really straight forward." P25

"Even though I am not very confident with these kinds of systems, I could go into this system and do what I need to do." P20

Users' expectations are informed by their WDF experience

- For several participants, their expectations around how this service would work was informed by their experience of using the WDF. So, for the most part they quickly grasped that this was a reimbursement fund, and that they would have to pay for the course first.
- One user had questions around eligibility, as the WDF is only open to employees who have been resident in the UK for at least 3 years. This in turn impacted what evidence they thought they would need – one user thought they would need to provide evidence of residential status.
- One participant also asked if non-care staff were eligible. With the WDF they are so long as the course they attend is eligible.

Concerns around non-registered staff

- Two people expressed concerns around some of the language concerning "non-registered" staff.
- This echoes a few comments we heard during the mini-discovery from people who said that there is a sense for some that non-registered ASC staff are seen as second-class citizens, and that the term "non-registered" elicits that feeling.

"In adult social care we feel like we're perceived as less important than NHS staff [...] It might be me because I'm really passionate about ASC staff getting the respect they deserve [...] The wording, 'non-registered', sounds unprofessional." P22

Concerns around duplication and GDPR / data security

- Several people were concerned with the possibility of creating duplicate learners in the system, and wondered if there were ways to make this less likely. This becomes more of a problem the larger the organisation, partly because there are more employees, but also because there are often more administrators.
- One suggestion for resolving this issue was adding learners' payroll / HR numbers, although there was some concern that this might not be permissible.
- Some users also had data security concerns around uploading evidence, specifically if evidence contained the names of people not on the claim.
- **More broadly these comments led us to believe that some of our user group have low confidence when it comes to data security and GDPR.**

Usability testing

Things to bear in mind

- While these sessions did technically ask people to perform a task - to log in and make and submit a new claim item - it did not feel particularly realistic. Only so much can be read into how participants behaved.
- We are also aware that participants came to these sessions cold, completely unaware of Targeted Upskilling and what it was. When live this may not always be the case, as people may arrive at the service already possessing some background knowledge.

Start page

- Overall, the feedback for this page was very positive. It was described as clear, simple, and easy to understand - although several people did later ask questions which suggest that the page perhaps lacks a bit of detail.
- People didn't make much of a point of there being two 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.

 GOV.UK Training Fund Reimbursement Service

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

Get reimbursed for adult social care CPD or training

Use this service if you're a provider of adult social care in England to claim for the costs of:

- continuing professional development (CPD) relating to professional registration requirements for nurses and allied health professionals
- targeted upskilling (TU) - training and qualifications for non-registered staff and agency staff

Eligible providers are Care Quality Commission (CQC) registered employers and Local Authorities.

Use this service to:

- claim the costs of CPD and targeted upskilling
- check the status of claims and whether payments have been made
- review your use of the adult social care training fund and how much money you can still claim for

[Start now >](#)

Before you start

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

To claim for CPD or training costs you'll need to check that the [activity](#) and [members of staff](#) are within scope of the training reimbursement fund.

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 starting and completing the course will also be required.

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

Contact the NHS Business Services Authority contact centre:

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



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Start page (continued)

- 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.

 GOV.UK

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Activities in scope

- A couple of users suggested they might use this table to find high-quality courses, and not just for checking the eligibility of courses they'd already decided to procure. 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.

GOV.UK Training Fund Reimbursement Service

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

Activities in scope for adult social care CPD or training

CPD

For staff registered with a professional body such as the Nursing and Midwifery Council (NMC), reimbursement claims can be made for any CPD activities that meet the requirements for re-registration. The NMC has [examples of relevant CPD activities](#). A maximum of £1000 can be claimed per eligible person per year.

Targeted Upskilling

For other staff, training courses and qualifications can be claimed for if they're on the approved list. There is no maximum amount that can be claimed per eligible person each year.

Search the list below.

Contact the NHS Business Services Authority contact centre if you have any questions about eligible activities.

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

Search for a course

Course	Category
► Becoming a manager	Leadership
► Dementia Basics	Dementia
► Intro to autism	Neurodivergence & complex needs

Selected filters

[Clear filters](#)

Type

<input checked="" type="checkbox"/> Leadership	<input type="checkbox"/> Dementia
<small>Neurodivergence & complex needs</small>	

[Apply filters](#)

Keywords

Type

<input checked="" type="checkbox"/> Dementia (18)
<input type="checkbox"/> Digital (5)
<input checked="" type="checkbox"/> Leadership (2)
<input type="checkbox"/> Delegated healthcare tasks (22)
<input checked="" type="checkbox"/> Neurodivergence & complex needs (6)
<input type="checkbox"/> Other (13)

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Eligibility

- There was some uncertainty regarding which staff members are eligible.
- For example, international staff, non-care staff and Personal Assistants are not mentioned. We might need to be more explicit about this.

How Might We... ensure that users know exactly who is and isn't eligible for the scheme?

Get reimbursed for adult social care CPD or training

CPD

Eligible employees are:

- permanent nurses
- temporary nurses
- allied health professionals: art therapists, drama therapists, music therapists, dieticians, occupational therapists, orthoptists, osteopaths, physiotherapists, and speech and language therapists

They must be employed by a CQC registered care provider or Local Authority.

Related content

[Get reimbursed for adult social care CPD or training](#)

[Activities in scope for adult social care COD or training](#)

Targeted Upskilling

Eligible employees are:

- bank registered nurses
- agency staff
- non-regulated managerial staff
- staff providing direct care

Contact the NHS Business Services Authority contact centre if you have any questions about eligibility.

Email: xxxx@bsa.nhs.uk

Phone: 01234 567890

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

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Manage claim items

- People broadly understood what they we're being shown here.
- 'Claim items'. This term 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 the page was presented.

GOV.UK Training Fund Reimbursement Service
Organisation details Your account Sign out

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

Manage claim items

Incomplete (21) Ready to submit (0) Submitted (0) Insufficient evidence (3) Paid (22)

Incomplete (21)

Search for a learner or activity You can search by a person's name or by a course name

Item ID	L&D Activity	Start date	Actions
#03894	Dementia Basics	23 November 2023	Add evidence
#05235	Becoming a better manager	16 November 2023	Add evidence
#06134	Intro to autism	25 October 2023	Add evidence

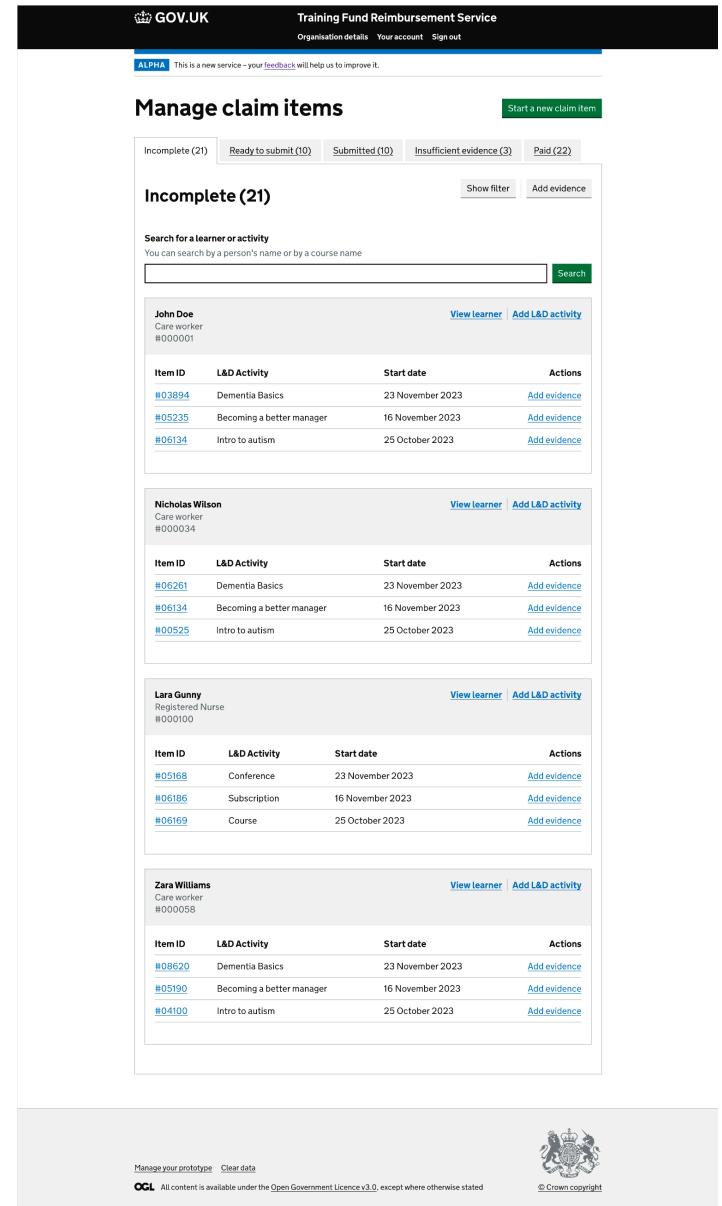
John Doe Care worker #000001

Nicholas Wilson Care worker #0300034

Lara Gunn Registered Nurse #000100

Zara Williams Care worker #000058

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Manage claim items (continued)

- The tabs / buckets at the top were helpful, with only one user struggling with this.
- That particular user did not realise that the categories were mutually exclusive, i.e. a claim item could not have 2 or more of these statuses simultaneously.

How Might We... make it clearer what is meant by a claim item and how it is different from a claim?

The screenshot shows the 'Manage claim items' page of the GOV.UK Training Fund Reimbursement Service. The page has a header with the GOV.UK logo, a sign-in link, and a feedback link. Below the header, there's a blue bar with the text 'ALPHA This is a new service - your feedback will help us to improve it.' The main content area is titled 'Manage claim items' and has a sub-section titled 'Incomplete (21)'. There are four collapsed sections for learners: John Doe, Nicholas Wilson, Lara Gunn, and Zara Williams. Each section contains a table with columns for Item ID, L&D Activity, Start date, and Actions (Add evidence). The 'Incomplete' status is shown in red in the first section for John Doe.

Item ID	L&D Activity	Start date	Actions
#03894	Dementia Basics	23 November 2023	Add evidence
#05235	Becoming a better manager	16 November 2023	Add evidence
#06134	Intro to autism	25 October 2023	Add evidence

Item ID	L&D Activity	Start date	Actions
#06261	Dementia Basics	23 November 2023	Add evidence
#06134	Becoming a better manager	16 November 2023	Add evidence
#00525	Intro to autism	25 October 2023	Add evidence

Item ID	L&D Activity	Start date	Actions
#05168	Conference	23 November 2023	Add evidence
#06186	Subscription	16 November 2023	Add evidence
#06169	Course	25 October 2023	Add evidence

Item ID	L&D Activity	Start date	Actions
#08620	Dementia Basics	23 November 2023	Add evidence
#05190	Becoming a better manager	16 November 2023	Add evidence
#04100	Intro to autism	25 October 2023	Add evidence

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Start a new claim item

- People seemed to grasp quite 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 was seen as critical by many, particularly those working for large providers with centralised L&D / admin teams.

The screenshot shows a web page titled 'Start a new claim item'. At the top, there's a navigation bar with the GOV.UK logo, the service name 'Training Fund Reimbursement Service', and links for 'Organisation details', 'Your account', and 'Sign out'. A blue banner at the top indicates it's an 'ALPHA' service and encourages user feedback. The main content area has a heading 'Start a new claim item' and a question 'Do you want to add a claim item by learner or by event?'. It then branches into two options: 'By learner' (described as best for adding activities to specific staff) and 'By event' (described as allowing quick addition of multiple staff to the same activity). Each option has a radio button next to it. A 'Continue' button is located below the radio buttons. At the bottom of the page, there are links for 'Manage your prototype' and 'Clear data', along with a note about OGL (Open Government Licence v3.0) and the Royal Coat of Arms logo.

Select the course or qualification

- There was mostly positive feedback regarding this page. For most users it was seen as "user friendly" and "easy to read", although other users found it confusing, believing that care providers would need to add their own courses, rather than search for existing ones.
- Another confusion was around recommending trainers or courses, which this page is not intended to do.

The screenshot shows a web interface for selecting a course or qualification. At the top, there's a GOV.UK header with links for '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.' Below this, the main title 'Select the course or qualification' is displayed. A sub-instruction 'Add claim item by learner' is shown above the table. A note below the table states 'You are adding a claim item for Sameer Khan (OT). They are eligible for targeted upskilling.' On the left, there's a sidebar with a 'Filter' section containing a 'Keywords' input field and a 'Course Category' section with several checkboxes for categories like Dementia, Digital, Leadership, etc. The main content area displays a table of courses:

Course	Category	Provider	Cost	Reimbursable cost
Becoming a better manager	Leadership	Training 101	£200	£180
Dementia basics	Dementia	Training 101	£120	£110
Intro to autism	Neurodivergence	Training 101	£95	£70

Each row in the table has a green 'Select' button on the far right. At the bottom of the page, there are links for 'Manage your prototype' and 'Clear data', and a copyright notice: '© Crown copyright' with the Royal Coat of Arms logo.

Select the course or qualification (continued)

- It was noted that having multiple courses with similar names may be challenging for users, who may have a long list to choose from. Users said additional filters would be helpful. The table could include course duration, course content and whether it was face-to-face or online. Course codes, which are used by the WDF to identify courses at present, were also suggested.
- Several users suggested that they would use the table as a catalogue to identify eligible courses. In this context, having a list of accredited courses would be useful.

The screenshot shows a user interface for selecting a course or qualification. At the top, there's a GOV.UK logo and navigation links for 'Training Fund Reimbursement Service', 'Organisation details', 'Your account', and 'Sign out'. A blue 'ALPHA' banner indicates this is a new service. Below, a heading says 'Add claim item by learner' and 'Select the course or qualification'. A note states: 'You are adding a claim item for Sameer Khan (OT). They are eligible for targeted upskilling.' On the left, there's a sidebar with 'Filter' and 'Keywords' sections, and a 'Course Category' section with checkboxes for Dementia (18), Digital (5), Leadership (2), Delegated healthcare tasks (5), Neurodivergence & complex needs (7), and Other (7). The main area displays a table of courses:

Course	Category	Provider	Cost	Reimbursable cost	Action
Becoming a better manager	Leadership	Training 101	£200	£180	Select
Dementia basics	Dementia	Training 101	£120	£110	Select
Intro to autism	Neurodivergence	Training 101	£95	£70	Select

At the bottom, there are links for 'Manage your prototype' and 'Clear data', and a note about the Open Government Licence v3.0. The Royal Coat of Arms is in the bottom right corner.

Who attended the training?

- Most users found this page straightforward to use, although one believed that this page could be used for booking training courses directly.
- There was some confusion about adding a new learner. One user believed that our example learner "John Smith" had been added already, but correctly identified that he had not been by checking the list underneath. Users assumed that finding someone in the search bar meant they were eligible for the reimbursement, and if they were not in the list, they were ineligible (which is not the case).
- Some users asked what would happen if an employee moved organisations, and how they might be identified.

The screenshot shows a GOV.UK header with the title 'Training Fund Reimbursement Service' and links for '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.' The main heading is 'Who attended the training?'. Below it, a note says 'You are adding a claim item for the Becoming a better manager course on 23 November 2023. Select the members of staff who attended this training.' A search bar is labeled 'Search for a person' with the placeholder 'You can search by a person's name'. A link 'Add a new learner' is provided for those not in the list. The 'Search results' table has columns: ID, Surname, First name, Role, Location, and Eligible for. One row is shown: ID 0001, Surname Smith, First name John, Role Nurse, Location Old Trafford Care Home, and Eligible for TU. An 'Add learner' button is next to the location column. Below the table, a message says 'You have now added these learners to this L&D event:' followed by a list: '• Angie Smith ([remove](#))' and '• James Jones ([remove](#))'. A 'Continue' button is at the bottom. At the bottom of the page are links 'Manage your prototype', 'Clear data', and 'OGL All content is available under the Open Government Licence v3.0, except where otherwise stated'. The Royal Coat of Arms is in the bottom right corner.

Adding evidence

- It was unclear to some users that evidence relates to the course or activity being claimed for, and instead believed that the evidence related to the user. This seemed to stem from the requirements of the WDF, where carers need to have been resident in the UK for three years prior to making a claim.
- Users were mostly able to identify what each of the three radio buttons referred to...
- **Evidence of payment** is most likely to be in the form of an invoice. Users reported that invoices were often applicable to multiple learners. It was suggested that "Payment" could be renamed as "Invoice" as most payment evidence is in the form of invoices.

GOV.UK Training Fund Reimbursement Service
Organisation details Your account Sign out
ALPHA This is a new service – your [feedback](#) will help us to improve it.

Add claim item by learner
Do you have evidence to add?
If not, you can add this later.

Yes
 No

Save and continue

Manage your prototype Clear data
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GOV.UK Training Fund Reimbursement Service
Organisation details Your account Sign out
ALPHA This is a new service – your [feedback](#) will help us to improve it.

Add claim item by event
Type of evidence

What type of evidence is this?
 Payment
 Enrollment
 Completion

Upload a file
 Choose file No file chosen

Does this evidence apply to all learners for this event?
 Yes
 No

Save and continue [Save and add another piece of evidence](#)

Adding evidence (continued)

- **Evidence of enrollment** was seen as the most difficult to obtain, with some participants being unsure what this might include. Suggestions from users included letters of acceptance from colleges or providers, or a confirmation email after booking a training course. This was seen as most likely to be provided for an individual, not a group.
- **Evidence of completion** was suggested to be certificates of course completion. Users reported that certificates are most likely to be produced for individuals, rather than groups, so this evidence would not usually apply to a group. One user reported that they would upload multiple certificates using a .Zip file, rather than one-by-one.

GOV.UK Training Fund Reimbursement Service
Organisation details Your account Sign out
ALPHA This is a new service – your [feedback](#) will help us to improve it.
Add claim item by learner
Do you have evidence to add?
If not, you can add this later.
 Yes
 No
[Save and continue](#)
[Manage your prototype](#) [Clear data](#)
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GOV.UK Training Fund Reimbursement Service
Organisation details Your account Sign out
ALPHA This is a new service – your [feedback](#) will help us to improve it.
Add claim item by event
Type of evidence
What type of evidence is this?
 Payment
 Enrollment
 Completion
Upload a file
 Choose file No file chosen
Does this evidence apply to all learners for this event?
 Yes
 No
[Save and continue](#) [Save and add another piece of evidence](#)

Check your answers

- The main feedback on this page was related to the "Add claim item" button. The phrase "Add claim item" was interpreted by some as meaning begin a *new* claim, and numerous participants did not realise that this button would actually finish creating the claim they'd just been entering data for.
- It was also suggested that the button would add a new person to the claim.
- Others thought that it would add the claim to a 'basket', similar to an online shopping checkout, which the user could review before submitting.

The screenshot shows a web page with a dark header bar containing the GOV.UK logo, the service name 'Training Fund Reimbursement Service', and links for 'Organisation details', 'Your account', and 'Sign out'. Below the header, a blue 'ALPHA' badge with the text 'This is a new service – your [feedback](#) will help us to improve it.' is displayed. The main content area has a light grey background and features a heading 'Add claim item by learner' followed by a bold sub-heading 'Check your answers before adding the claim item'. Below this, there is a table with four rows of data:

Learner	Sameer Khan	Change
Activity	Becoming a better manager	Change
State date	23 November 2023	Change
Evidence of payment	invoice.png	Change

At the bottom of the table is a green 'Add claim item' button. At the very bottom of the page, there are links for 'Manage your prototype', 'Clear data', and the 'OGL' logo with the text 'All content is available under the [Open Government Licence v3.0](#), except where otherwise stated'. To the right of the OGL logo is the Royal Coat of Arms and the text '© Crown copyright'.



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Thank you!