**Technical Detail Form**

**Introduction**

This form has been designed to assist in gathering the relevant technical information relating to projects undertaken for the purpose of the R&D Tax Relief, it is entirely your choice how you use this form. It may be useful to have it to hand on our next call, to use as a reference, or you can forward a copy across to us via email prior to the call.

The questions outlined below are intended to help you in gathering the necessary technical detail. Completing as much information as possible will speed up the claim process and lead you to a robust and successful claim.

It is our priority to ensure that every claim that is submitted satisfies all the necessary criteria and has all the detail HMRC expect to see. We kindly ask you, that when answering the questions, you focus on the technical aspects of the projects that you have undertaken.

**Here to help**

The tax legislation can be complex and convoluted so we have done our best to avoid tax jargon, simplifying the questions to make the process of claiming R&D Tax Relief a more pleasant experience for our clients.

If at any point you require assistance with this document or any information requested, please feel free to get in touch as we are always here to help.

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| **Project 1** |
| **Project 1 Name** | **Summit EPA** |
| **Project Start Date** |  | **Project End Date** |  |
| **Project Overview and Objectives*** What was the general premise of the project?
* What were specific aims and objectives?
* What were the criteria that you were trying to achieve?
 | Conducts the final assessment of the apprentice and determines the final gradeOrganization admin add their assessors, standards, content and manage various other functionality, can view and download reports.Training Providers add their employers, learners, tutors and can schedule component booking /reschedule booking for their learners, can view assessment reports. Learners and Training Providers add their gateway evidences, and then organization validate and move to EPA Started as per dates mentioned. Assessor and learner take part in component assessments and assessor grade components, once it is graded an IV assigned by organization who validate assessor feedback and approve/amend feedback. And then learner, training provider etc can view feedbacks. Assessor & organization decide resist/retake for component if fails.System auto provide final grade once all components are IV graded. |
| ***Keywords****: functionality; technical parameters; Cost targets, Technical application* |
| **Pre-existing Technology and Methods*** What were the closest alternatives/products available with similar characteristics?
* What would have been a standard method of achieving the goals of the project?
* How were the existing methods limited or why they were not suitable?
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| ***Keywords:*** *alternative products; Adjacent industries; Competitor’s technology; Past experiences* |
| **Technical Challenges and Complexities**- What did you not know how to do?- What did you need to work out to achieve the objectives?- What complications did you encounter?- What did not work and why?  | Automation of complex process e.g. Complex algorithms to handle automatic assessor booking with learners and process assessor review with IV/Moderator on bases of sampling data.Complex algorithms to handle automatic grading of components and overall grades, when standards have different criteria, different grade types etc. Initially, we tried to admin/moderator review each feedback, which later could not work due to large number of learners in system, so then we designed best suited algorithms to automate process.Management of assessors, Moderators, training providers, employers, mentors, tutors, learners – we have set up a clear communication flowchart for each role with transparency. Security threats example - Cross-Site Scripting, Phishing, Cross-Site Request Forgery, Shell Injection, Session Hijacking, SQL Injection, Buffer Overflow.XSS - configured Apache and write more secure PHP scripts (validating all user input) to avoid XSS attacks.SQL Injection - configured Apache and written library to validate all user inputs to avoid SQL injection.Cross-Site Request Forgery – Added CSRF tokens to handle to avoid to execute unwanted actions  |
| ***Keywords****: Components and materials, integration, compatibility, application environment* |
| **Activities undertaken and Solution found*** What steps did you undertake and what work you did to find a solution?
* What did you try and experiment with and what were the learnings?
* What was the final solution and how did it work?
 | One Major problem was to create a UI which is easy to understand for learners, assessors, moderators, tutors, training providers.So we had implemented many UI views, tested, modified and then finalized one which is easy to understand, and handle various activities required.Summit EPA is a large system where challenges was data complexity and security. We have done a lot of research to solve data complexity and used AI technique to handle it.We have used different encryption method to secure user data like Hashing, Secret Key Encryption etc. |
| ***Keywords:*** *Design, trial, testing, modifications, data collection, new capability.* |

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| **Project 2** |
| **Project 2 Name** |  |
| **Project Start Date** |  | **Project End Date** |  |
| **Project Overview and Objectives*** What was the general premise of the project?
* What were specific aims and objectives?
* What were the criteria that you were trying to achieve?
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| ***Keywords****: functionality; technical parameters; Cost targets, Technical application* |
| **Pre-existing Technology and Methods*** What were the closest alternatives/products available with similar characteristics?
* What would have been a standard method of achieving the goals of the project?
* How were the existing methods limited or why they were not suitable?
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| ***Keywords:*** *alternative products; Adjacent industries; Competitor’s technology; Past experiences* |
| **Technical Challenges and Complexities**- What did you not know how to do?- What did you need to work out to achieve the objectives?- What complications did you encounter?- What did not work and why?  |  |
| ***Keywords****: Components and materials, integration, compatibility, application environment* |
| **Activities undertaken and Solution found*** What steps did you undertake and what work you did to find a solution?
* What did you try and experiment with and what were the learnings?
* What was the final solution and how did it work?
 |  |
| ***Keywords:*** *Design, trial, testing, modifications, data collection, new capability.* |

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| **Project 3** |
| **Project 3 Name** |  |
| **Project Start Date** |  | **Project End Date** |  |
| **Project Overview and Objectives*** What was the general premise of the project?
* What were specific aims and objectives?
* What were the criteria that you were trying to achieve?
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| ***Keywords****: functionality; technical parameters; Cost targets, Technical application* |
| **Pre-existing Technology and Methods*** What were the closest alternatives/products available with similar characteristics?
* What would have been a standard method of achieving the goals of the project?
* How were the existing methods limited or why they were not suitable?
 |  |
| ***Keywords:*** *alternative products; Adjacent industries; Competitor’s technology; Past experiences* |
| **Technical Challenges and Complexities**- What did you not know how to do?- What did you need to work out to achieve the objectives?- What complications did you encounter?- What did not work and why?  |  |
| ***Keywords****: Components and materials, integration, compatibility, application environment* |
| **Activities undertaken and Solution found*** What steps did you undertake and what work you did to find a solution?
* What did you try and experiment with and what were the learnings?
* What was the final solution and how did it work?
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| ***Keywords:*** *Design, trial, testing, modifications, data collection, new capability.* |