

Editorial Review Form

Part A: General Details

Reviewer name	Rachael Halliwell
Date of review	2.8.22
Curriculum track[s] Select up to three from the curriculum taxonomy	N/A (as requested)
Syllabi topic[s] (choose a curriculum track from this page to view the associated syllabi topics)	N/A (as requested)
SRA competences (delete as necessary)	A: Ethics, professionalism & judgement B: Technical legal practice C: Working with other people D: Managing themselves & their own work
Course name	Redacted
Delivery methodology	Redacted
Author	Redacted
Level	<input type="checkbox"/> Foundation <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Mastery
Is the level appropriate?	<input type="checkbox"/> Yes <input type="checkbox"/> No (please suggest another one)
Decision	<input type="checkbox"/> No changes required <input type="checkbox"/> Minor revisions <input type="checkbox"/> Significant revisions <input type="checkbox"/> Do not deliver
Synopsis of review decision (250 words max)	Add info here

Part B: Recommended revisions

Please use this section to provide detailed feedback on any slides or pages you are recommending revisions to.

File name	Slide / page number / heading	Issue	Recommended change[s]
Not Applicable	Global	Generic font	Consider changing to something which isn't default. Ensure 'sans serif' style for easy readability on the web
	Global	Brand colours	
	Global	Missing graphics throughout	Ideally, we would see this content in situ during editorial review – particularly if there are text elements to the assets
	Global	The Law Society logo positioning (too small/high up on the slides)	Consider a review by Graphics to alter the .PPT layout template
	Global	Progress bar and 'hamburger' icon at top right of each slide aren't indicating correct progress and may confuse the learner	Assuming these would update and work in live version, but making a note just in case a doc like this would be forwarded on to the learner in addition
	Global	[Suggestion] Headings in title case	Depending on house style/any other style guide followed, consider changing headings to sentence case instead, for better style and visual flow
	WIQS Estate Administration	Comma needed in 'In this module you will cover'	Change to 'In this module, you will cover'
	WIQS Estate Administration	Will the learner understand the 'WIQS' acronym?	If the learner not likely to be familiar with the terminology, add in the full term either in heading, or have an explainer intro sentence
	WIQS Estate Administration	Will the learner understand the 'CGT' acronym?	If the learner not likely to be familiar with the terminology, add in the full term and an explainer, if necessary

	WIQS Estate Administration	Will the learner understand the 'PR' acronym?	If the learner not likely to be familiar with the terminology, add in the full term and an explainer, if necessary
	WIQS Estate Administration	Comma needed in 'After completing this module you will be able to'	Change to 'After completing this module, you will be able to'
	WIQS Estate Administration	Full stop at the end of bullet point: 'Represent the patient effectively in Court of Protection proceedings and maximise their participation.'	Remove the full stop
	An Estates Liability for Income Tax and CGT	'Box menu' activity type description present at top of screen	Ensure this is removed in any learner-facing content
	An Estates Liability for Income Tax and CGT	Colons at the end of text in each box	Either remove this or make sure the boxes are flipped so the graphics are situated at the bottom
	An Estates Liability for Income Tax and CGT	Spacing of text in each box	Add spacing between 'Chapter', body, and 'Duration' in each box to make better use of white space.
	Chapter 1 Simple and Complex Estates	Text in white box/consider realigning text	Depending on final graphic used, consider aligning the text to the centre. Also suggest removing the white background on graphic is added in, to make it look more professional
	Overview [1] Overview [2] Overview [3]	The headings here look a little clunky	Suggest changing to 'Overview' and 'Overview (continued)', or even to something more relevant for each slide (to be discussed with SME or Learning Designer)
	Overview [1] Overview [2] Overview [3]	Intro paragraphs for these slides look small in font and too high up	Depending if layout changes in learner view, shift everything down
	Overview [1] Overview [2] Overview [3]	Bullet point formatting inconsistent between these three sections	Will need making consistent depending on which style guide to follow (capitalise beginning words, remove full stops, etc.)

	Overview [1] Overview [2] Overview [3]	Use of double speech marks in repeated text	Depending on style guide, consider replacing with single quotes, as sometimes doubles are frowned upon for web formats. In any case, the first slide has both single and double quotes, which will need making consistent
	Overview [1]	Commas/dashes need adding to 'Instead' paragraph	Update to something like: 'Instead, they make a calculation at the end of the administration period of the total income tax and CGT due, and – provided HMRC agree the calculation – make a one-off payment.'
	Overview [1]	Line break needed for 'Estate details' sentence	Add a line break
	Overview [2]	Reference (second to last sentence)	Check the formatting of this reference, as it looks messy in its current form
	Overview [2]	Add comma to last sentence	Update to 'In all other cases, the estate is simple.'
	Overview [3]	Commas/dashes need adding to 'Usually' paragraph	Update to something like: 'Usually – but not always – it will be obvious. Inland Revenue made the following points in the Trusts and Estates Newsletter (August 2018):'
	All slides from 'Simple estates' to 'Complex estates'	'Estates' needs capitalising	Capitalise 'Estates' in each heading, in line with the rest of the content
	All slides from 'Simple estates' to 'Complex estates'	Bullet point formatting inconsistent between these sections	Will need making consistent depending on which style guide to follow (capitalise beginning words, remove full stops, etc.)
	Simple estates: Procedure for paying tax [1]	'35 October' error in text	Assuming this should be replaced with '31 October', but SME/Learning Designer to check the correct deadline date, just in case!
	Simple estates: Procedure for paying tax [1]	'Information required' box very text-heavy	Consider breaking this text up/reformatting
	Complex estates: Procedure for paying tax [2]	Missed html tag in left box	Remove additional tags
	Complex estates: Procedure for paying tax [2]	Right box acronym 'TSEM' – will learners know what this is?	If the learner not likely to be familiar with the terminology/works, add in the full term

	Complex estates: Procedure for paying tax [3]	Are single quotes around 'close' needed?	SME/Learning Designer to confirm this
	Complex estates: Procedure for paying tax [3]	White space	Consider stretching text box or adding a relevant graphic
	Complex estates: Procedure for paying tax [3]	Text edit needed for better flow	<p>Change to something like:</p> <p>'In the August 2020 Trust and Estates Newsletter, HMRC asked PRs to notify the closure of the estate via the Trust Register. This would have meant reporting closure twice over.</p> <p>Following objections from professionals dealing with estate administration, HMRC confirmed that it accepts the following:</p> <p>Where a closure notification has already been made by letter or in a self assessment return, PRs or agents do not need to update the Register; HMRC staff will do it on their behalf.'</p>
	Complex estates: Procedure for paying tax [3]	Link at bottom of text	Do we want this link in, or should it be listed as a reference instead so as not to change the learner's focus?
	Knowledge check	'Box menu' activity type description present at top of screen	Ensure this is removed in any learner-facing content
	Knowledge check	Answer text misaligned	Ensure all text aligned
	Knowledge check	Final answer length much longer than other two	Sometimes this can give away the correct answer! SME/LD to reconsider answers

General comments:

Please see the 'global comments' in the table above for these.

In addition, if resources would allow, I'd suggest adding in more interactive elements for the text heavy slide, or even consider some video content to break the learning up and keep the audience engaged.