**Equality Screening Form**

**INTRODUCTION**

The information contained in this Equality Screening Form has been extracted from the Equality Commission for Northern Ireland’s Guide for Public Authorities (2010). Additional information about the 5 parts of the form and a flowchart to demonstrate the process of completion is detailed in [**Appendix 1**](#Appendix1) of the form.

This template document and further guidance can be found by clicking the following link - [www.equalityni.org/S75duties](https://www.equalityni.org/S75duties)

**PART 1- POLICY SCOPING**

The first stage of the screening process involves scoping the policy under consideration. The purpose of policy scoping is to help prepare the background and context and set out the aims and objectives for the policy, being screened. At this stage, scoping the policy will help identify potential constraints as well as opportunities and will help the policy maker work through the screening process on a step-by-step basis.

Public authorities should remember that the Section 75 statutory duties apply to internal policies (relating to people who work for the authority), as well as external policies (relating to those who are, or could be, served by the authority).

**Information about the policy**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Name of Policy** | Translink Future Ticketing System Project | | | | | |
| **Is it existing, revised or a new policy?** | Existing |  | New |  | Revised |  |
| **If revised, please outline main updates:** | Updated to reflect current status of the TFTS Project, some minor additions with updated signees. | | | | | |
| **What is it trying to achieve?**  **(Intended aims/outcomes)** | Replace current Ticketing System with new system offering some enhanced functionality | | | | | |
| **Are there any Section 75 categories which might be expected to benefit from the intended policy? If so, explain how.** | a) Age: by facilitating ease of travel by older and younger people plus b) Disability: by making purchase of tickets and travel cards easier plus top-up of smartcard via more convenient manner e.g. online top-ups c) by making the process more automated, the process could potentially enable those where English is not their first language to more easily purchase tickets and use public transport without need for passenger / staff interaction d) Dependents: by making ticket purchase and use more convenient thereby enabling those with dependents to more easily travel via public transport. | | | | | |
| **Who initiated or wrote the policy?** | Andrew Muir (TFTS) | | | | | |
| **Who owns and who implements the policy?** | G Watson (TFTS) / G Mawhinney (Bus Ops) | | | | | |

**Implementation Factors**

|  |  |  |  |
| --- | --- | --- | --- |
| Yes |  | No |  |

Are there any factors which could contribute to/detract from the intended aim/outcome of the policy/decision?

If yes, are they: (Select all applicable)

|  |  |
| --- | --- |
|  | Financial |
|  | Legislative |
|  | Other – please specify: |  |

**Main stakeholders affected**

Who are the internal and external stakeholders (actual or potential) that the policy will impact upon?

|  |  |
| --- | --- |
|  | Staff |
|  | Service Users |
|  | Other Public Sector Organisations |
|  | Voluntary/ Community/ Trade Unions |
|  | Other – please specify: | Other Transport operators |

##### [Other policies with a bearing on this policy](#Onefour) (please list):

|  |
| --- |
| * **What are they?**   1. Regional Development Strategy 2035 – Building a Better Future  2. Ensuring a Sustainable Transport Future – A New Approach to Regional Transportation.  3. Translink’s Corporate Vision, Values and Objectives  4. Translink’s Sustainability Strategy.   * **Who owns them?**   1. Department for Infrastructure  2. Department for Infrastructure  3. Translink  4. Translink |

**Available Evidence**

Evidence to help inform the screening process may take many forms. Public authorities should ensure that their screening decision is informed by relevant data. The following document should help you source data - [Section 75 - Evidence Signposting Guide](https://www.equalityni.org/ECNI/media/ECNI/Publications/Employers%20and%20Service%20Providers/Public%20Authorities/S75DataSignpostingGuide.pdf)

What evidence/information (both qualitative and quantitative) have you gathered to inform this policy? Specify details for each of the Section 75 categories.

|  |  |
| --- | --- |
| **Section 75 category** | **Details of evidence/information** |
| Religious belief | * NISRA Continuous Household Survey * 2011 Census |
| Political opinion | * Previous election results at Council, Assembly and Westminster levels |
| Racial group | * NISRA Continuous Household Survey * 2011 Census * Recent attitudinal surveys via Life and Times Surveys |
| Age | * 2011 Census plus NI Travel Survey * Overall general age breakdown of passengers e.g. School Pupil Passengers, Concessionary Travellers * Quantitative and qualitative research undertaken with older and younger people to inform Feasibility Study by Translink’s Future Ticketing System Project External Technical Advisors (Systra) plus consultation via IMTAC * (Qualitative research) after appointment of supplier. |
| Marital status | * NISRA Married and Civil Partnership statistics from 2011 Census plus NISRA Continuous Household Survey |
| Sexual orientation | * NISRA Continuous Household Survey * Recent attitudinal surveys via Life and Times Surveys |
| Men and women generally | * NI Travel Survey * NISRA Continuous Household Survey * 2011 Census |
| Disability | * NISRA Continuous Household Survey * 2011 Census * NI Travel Survey * SmartPass User Database re Blind, War Disabled and Half Fare SmartPass users * Translink Access Guide plus Disability Action Plan * Department for Transport (GB) Inclusive Mobility 2005 Guidelines * Consultation via IMTAC (qualitative research) subsequent to appointment of supplier. |
| Dependants | * NISRA Continuous Household Survey * 2011 Census |

**Needs, Experiences and Priorities**

Taking into account the information referred to above, what are the different needs, experiences and priorities of each of the following categories, in relation to the particular policy/decision?

Specify details for each of the Section 75 categories

|  |  |
| --- | --- |
| **Section 75 category** | **Details of needs/experiences/priorities** |
| Religious belief | It is difficult to ascertain specific religion of customers using Translink’s Ticketing Systems and passengers travelling on Translink’s Bus and Rail services but considered acceptable to work on the basis that these correlate to wider statistics in relation to religious belief from 2011Census and NISRA Continuous Household Survey.  It is however not considered that the needs, experiences and priorities of people of a different religious belief are significantly different nor specifically affected with regards to Translink’s Future Ticketing System Project apart from Muslim women who require a slightly adapted application procedure to access certain travel products e.g. Concessionary SmartPass and yLink. Such a procedure has already been implemented without any issues arising. |
| Political opinion | It is difficult to ascertain specific political opinion of customers using Translink’s Ticketing Systems and passengers travelling on Translink’s Bus and Rail services but considered acceptable to work on the basis that these  correlate to wider statistics in relation to political opinion from previous election results.  It is however not considered that the needs, experiences and priorities of people of a different political opinion are significantly different nor specifically affected with regards to Translink’s Future Ticketing System Project. |
| Racial group | Key issues arising for people of different racial group is for people where English is not their first language.  Information in relation to such is illustrated in, for example,2011 Census which identified that for 96.86% of people English is their first language but for 1.02% it was Polish,0.36% Lithuanian, 0.24% Irish (Gaelic), 0.13% Portuguese, 0.13% Slovak, 0.13% Chinese and 0.11% Tagalog/ Filipino alongside geographic focus for relevant nationalities e.g. Local towns with higher-than-average focus of people whom English is not their first language.  The attitudes previously expressed in Life and Times Surveys help to better understand challenges faced by people of different race such as potential social isolation. |
| Age | 2011 Census illustrates demography of Northern Ireland population (as per below) alongside NI Travel Survey which provides detailed breakdown of age ranges and methods of travel used.    NI Travel Survey    This information, coupled with quantitative and qualitative research previously undertaken and passenger statistics such as School Pupil and Concessionary SmartPass Passenger numbers has been useful to help us plan how to meet the needs of different age ranges, particularly older and younger people, via a range of actions, as detailed later with younger people seeking more flexible technically advanced solutions whereas older people seeking more intuitive solutions which minimise requirement for interaction with electronic technology and machines. |
| Marital status | 2011 Census plus NISRA Continuous Household Survey provides information on those who are married or in civil partnerships, or not but it is not considered that the needs, experiences and priorities of people who are married, in a  civil partnership and those who are not are significantly different nor specifically affected with regards to Translink’s Future Ticketing System Project. |
| Sexual orientation | NISRA Continuous Household Survey collates information with regards to sexual orientation. It is not considered that the needs, experiences and priorities of people who are heterosexual (straight), lesbian, gay or bisexual are significantly different nor specifically affected with regards to Translink’s Future Ticketing System Project. |
| Men and women generally | 2011 Census plus NISRA Continuous Household Survey and NI Travel Survey (see below) collates information in relation to gender but it is not considered that the needs, experiences and priorities of men and women are significantly different nor specifically affected with regards to Translink’s Future Ticketing System Project.  **NI Travel Survey Gender information** |
| Disability | A range of information is captured concerning people with a disability such as 2011 Census and also the NISRA Continuous Household Survey but the most useful is the Concessionary SmartPass User Database detailing people with a disability who have applied for and obtained a Blind Persons SmartPass, War Disabled SmartPass and Half Fare SmartPass for a range of reasons e.g., Learning Disability, Visually Impaired. The NI Travel Survey is also useful in terms of understanding more about people with a disability alongside Department for Transport (GB)Inclusive Mobility 2005 Guidelines.  The guidelines, combined with consultation undertaken with people with a disability (via IMTAC) has helped create a fuller understanding of the needs of people with a disability in relation to Translink’s Future Ticketing System alongside statistical evidence via, for example, NI Travel survey (relevant extract below).  This information has helped us take a range of actions to meet the needs, experiences, and priorities of people with a disability, as outlined later. |
| Dependants | Whilst the NISRA Continuous Household Survey and 2011 Census provides information on those with caring responsibilities it is not considered that the needs, experiences and priorities of people with dependents and those without are significantly different nor specifically affected with regards to Translink’s Future Ticketing System Project. |

**PART 2 - SCREENING QUESTIONS**

**Introduction**

In making a decision as to whether or not there is a need to carry out an equality impact assessment, the public authority should consider its answers to the questions 1-4 which are given on pages 66-68 of the Guide: [Guide for Public Authorities April 2010](https://www.equalityni.org/ECNI/media/ECNI/Publications/Employers%20and%20Service%20Providers/S75GuideforPublicAuthoritiesApril2010.pdf)

Taking into account the evidence presented above, consider and comment on the likely impact on equality of opportunity and good relations for those affected by this policy, in any way, for each of the equality and good relations categories, by applying the screening questions given overleaf and indicate the level of impact on the group i.e. minor, major or none.

**Impact: Major / Minor / None**

If the public authority’s conclusion is **major** in respect of one or more of the Section 75 equality of opportunity and/or good relations categories, then consideration should be given to subjecting the policy to the equality impact assessment procedure.

**In favour of ‘MAJOR’ impact**

|  |  |
| --- | --- |
| **A** | The policy is significant in terms of its strategic importance; |
| **B** | Potential equality impacts are unknown, because, for example, there is insufficient data upon which to make an assessment or because they are complex, and it would be appropriate to conduct an equality impact assessment in order to better assess them; |
| **C** | Potential equality and/or good relations impacts are likely to be adverse or are likely to be experienced disproportionately by groups of people including those who are marginalised or disadvantaged; |
| **D** | Further assessment offers a valuable way to examine the evidence and develop recommendations in respect of a policy about which there are concerns amongst affected individuals and representative groups, for example in respect of multiple identities; |
| **E** | The policy is likely to be challenged by way of judicial review; |
| **F** | The policy is significant in terms of expenditure. |

If the public authority’s conclusion is **minor** in respect of one or more of the Section 75 equality categories and/or good relations categories, then consideration should still be given to proceeding with an equality impact assessment, or to:

* Measures to mitigate the adverse impact; or
* The introduction of an alternative policy to better promote equality of opportunity and/or good relations.

**In favour of ‘MINOR’ impact**

|  |  |
| --- | --- |
| **A** | The policy is not unlawfully discriminatory and any residual potential impacts on people are judged to be negligible; |
| **B** | The policy, or certain proposals within it, are potentially unlawfully discriminatory, but this possibility can readily and easily be eliminated by making appropriate changes to the policy or by adopting appropriate mitigating measures; |
| **C** | Any asymmetrical equality impacts caused by the policy are intentional because they are specifically designed to promote equality of opportunity for particular groups of disadvantaged people; |
| **D** | By amending the policy there are better opportunities to better promote equality of opportunity and/or good relations. |

If the public authority’s conclusion is **none** in respect of all of the Section 75 equality of opportunity and/or good relations categories, then the public authority may decide to screen the policy out. If a policy is ‘screened out’ as having no relevance to equality of opportunity or good relations, a public authority should give details of the reasons for the decision taken.

**In favour of ‘NONE’**

|  |  |
| --- | --- |
| **A** | The policy has no relevance to equality of opportunity or good relations. |
| **B** | The policy is purely technical in nature and will have no bearing in terms of its likely impact on equality of opportunity or good relations for people within the equality and good relations categories. |

**Screening Questions 1 - 4**

|  |  |  |
| --- | --- | --- |
| **Screening Question 1** | | |
| What is the likely impact on equality of opportunity for those affected by this policy, for each of the Section 75 equality categories? Minor/ Major/ None | | |
| Section 75 category | Details of policy impact | Level of impact? Minor/Major/None |
| Religious belief | No impact – current service provision continues, project focused on enabling ease of ticket purchase. | None |
| Political opinion | No impact – current service provision continues, project focused on enabling ease of ticket purchase. | None |
| Racial group | More opportunities for automated ticket purchase could potentially enable those where English is not their first language to more easily purchase tickets and use public transport without need for passenger/ staff interaction. Additional languages will be available when using Ticket Vending Machines whilst ability will exist to translate online information and transaction data when purchasing tickets and topping-up smartcards via commonly used tools. | Minor |
| Age | Whilst current products will remain unaltered and additional products /improvements will be largely focused upon commuters the project will have a minor positive impact upon both older and younger people as a result of changes envisaged which will make travel easier.  For example, in relation to younger people, ways to make obtaining yLink cards easier have been implemented whilst ticket purchase opportunities will be modernised in line with expectations of younger people generally, e.g. online purchases etc.  With regards to older people, ticket purchase arrangements will remain largely unaltered e.g., Concessionary Smart Passes will not need replaced to work with the new ticketing system, ability to present to driver upon boarding a bus will remain but to enable ease of travel on BRT services no requirement will exist to obtain ticket from a Ticket Vending Machine but rather all that will be required is for 60+ and Senior SmartPass holders to present their Smartcard to a validator at the halt prior to boarding. | Minor |
| Marital status | No impact with current products that will be retained and/or removed plus additional products/improvements having no impact. | None |
| Sexual orientation | No impact with current products that will be retained and/or removed plus additional products/improvements having no impact. | None |
| Men and women generally | No impact with current products that will be retained and/or removed plus additional products/improvements having no impact. | None |
| Disability | Since the point where Translink’s Future Ticketing System was initially conceived, a strong desire has existed to deliver a modern and fully accessible system which meets the diverse needs of our customers, especially people with a disability and older people.  Requirement to achieve a system which meets needs of people with a disability plus older people was mainstreamed within the first three stages of the project and reflected within procurement tender documentation. This will deliver a modern ticketing system better equipped to meet needs of people with a disability e.g. online purchase tools which can be adapted to meet current accessibility requirements, height of equipment in line with DDA requirements.  Throughout the lifetime of the project, engagement with stakeholders has continued especially with key customer groups to ensure the finalised detailed system specifications meets their needs.  Previously TFTS carried out a Half Day Seminar in conjunction with Imtac in February 2017 with a range of people with a disability and older people attending.  This event was well attended (over 60 people in attendance) and extremely useful, helping to identify several issues especially in relation to problems that SmartPass holders could encounter using a BRT TVM, specifically those who are Blind, Partially Sighted or have a Learning Disability.  Considering these concerns, it was agreed that Blind and War Disabled SmartPass users will not need to use a TVM to purchase a ticket for a BRT service but will only need to validate their SmartPass prior to boarding.  In order to give full effect to the Disability Discrimination Act 1995 work has been undertaken to confirm that the new Ticketing System will be compliant with the 2005 Inclusive Mobility Guidelines from the Department of Transport (GB). This document specifically relates accessibility requirements within the environment of a modern public transport network so that it is focused on best practice in this targeted area. The 2005 Inclusive Mobility Guidelines have been considered in detail with full responses provided concerning compliance with each requirement– see attached document. The supplier (Flowbird) has also been given sight of this document to ensure they deliver required functionality as part of their obligations to which they committed during the procurement process.  As a result of discussions relating to how Half Fare SmartPass users obtain a ticket or permission to travel on BRT Services, it was agreed that these users will travel free of charge by validating their pass prior to boarding BRT services.  Furthermore, a specialist and experienced company known as User Vision was commissioned by Translink to undertake testing of draft Ticket Vending Machine screens by a range of people including those with a disability. | Minor |
| Dependants | Will have a minor positive impact, similar to disability by making travel easier via more accessible ticketing  system, combined with current initiatives e.g. Buddy Scheme. | Minor |

|  |  |  |
| --- | --- | --- |
| **Screening Question** **2** | | |
| Are there opportunities to better promote equality of opportunity for people within the Section 75 equalities categories? | | |
| Section 75 category | If **Yes**, provide details | If **No**, provide reasons |
| Religious belief |  | Current service provision continues, project focused on enabling ease  of ticket purchase. |
| Political opinion |  | Current service provision continues, project focused on enabling ease  of ticket purchase. |
| Racial group | More automated processes could potentially enable those where English is not their first language to more easily purchase tickets and use public transport without need for  passenger / staff interaction. |  |
| Age | Project will ensure ways older and younger people travel remains largely unaltered with some positive improvements e.g. ease of use for  young people via new technology, ability to just tap-on for older people  when boarding BRT vehicles. |  |
| Marital status |  | No impact with current products that will be retained and or removed plus additional products / improvements having no impact. |
| Sexual orientation |  | No impact with current products that will be retained and or removed plus additional products / improvements having no impact. |
| Men and women generally |  | No impact with current products that will be retained and or removed plus additional products / improvements having no impact. |
| Disability | By making purchase of tickets and travel cards easier plus top-up of smartcard via more convenient manner e.g. online top-ups, TVMs, will enable people with a disability to more easily access public transport. |  |
| Dependants | New functionality will make ticket purchase and use more convenient and thereby could help enable those with dependents to more easily travel via public transport. |  |

|  |  |  |
| --- | --- | --- |
| **Screening Question** **3** | | |
| To what extent is the policy likely to impact on good relations between people of different religious belief, political opinion or racial group? Minor/ Major/ None | | |
| Good relations category | Details of policy impact | Level of impact Minor/Major/None |
| Religious belief | No impact, project focused on ticket sales rather than a direct impact upon direct service delivery and other  significant service areas which impact upon communities | None |
| Political opinion | No impact, project focused on ticket sales rather than a direct impact upon direct service delivery and other  significant service areas which impact upon communities | None |
| Racial group | No impact, but has potential to make public transport more attractive for people of different racial  backgrounds due to new simpler more automated set-up. | None |

|  |  |  |
| --- | --- | --- |
| **Screening Question 4** | | |
| Are there opportunities to better promote good relations between people of different religious belief, political opinion or racial group? | | |
| Good relations category | If **Yes**, provide details | If **No**, provide reasons |
| Religious belief |  | Project focused on ticket sales rather than a direct impact upon direct service delivery and other significant service areas which impact upon communities |
| Political opinion |  | See above |
| Racial group |  | See above |

**Additional Considerations**

**Multiple Identity**

Generally speaking, people can fall into more than one Section 75 category. Taking this into consideration, are there any potential impacts of the policy/decision on people with multiple identities?  (For example: disabled minority ethnic people; disabled women; young Protestant men; and young lesbians, gay and bisexual people).

|  |
| --- |
| **Potentially for people of different races and people with a disability plus those with dependents.** |

Provide details of data on the impact of the policy on people with multiple identities. Specify relevant Section 75 categories concerned.

|  |
| --- |
| **No specific data available, general positive impact, as outlined earlier, which will naturally be stronger if person has one of the multiple identities outlined above.** |

**PART 3 - SCREENING DECISION**

If the decision is **not** to conduct an **equality impact assessment**, please provide details of the reasons.

|  |
| --- |
| **No major impact but a formal Consultation was conducted in 2015 to ascertain views on general Project proposals and offer people opportunity to highlight if any major Equality, Human Rights or Rural Impact concerns exist. Consultation was issued on 19 March 2015 with closure date 15 May 2015 eliciting eight responses plus request to meet with Education Authority Transport Officers which was facilitated on Thursday 4 June 2015. Responses received highlighted issues already elicited during informal consultation exercise in 2014 as part of the Feasibility Study involving both Qualitative and Quantitative Research. No significant change was therefore required.** |

If the decision is not to conduct an equality impact assessment the public authority should consider if the policy should be **mitigated, or an alternative policy be introduced**.

|  |
| --- |
| **No major impacts so mitigation not required though formal consultation did take place.** |

If the decision **is to** subject the policy to an **equality impact assessment**, please provide details of the reasons.

|  |
| --- |
| **Not applicable** |

All public authorities’ equality schemes must state the authority’s arrangements for assessing and consulting on the likely impact of policies adopted or proposed to be adopted by the authority on the promotion of equality of opportunity. The Commission recommends screening and equality impact assessment as the tools to be utilised for such assessments. Further advice on equality impact assessment may be found in a separate Commission publication: Practical Guidance on Equality Impact Assessment.

**Mitigation**

When the public authority concludes that the likely impact is ‘minor’ and an equality impact assessment is not to be conducted, the public authority may consider mitigation to lessen the severity of any equality impact, or the introduction of an alternative policy to better promote equality of opportunity or good relations.

Can the policy/decision be amended or changed, or an alternative policy introduced to better promote equality of opportunity and/or good relations?

If so, give the **reasons** to support your decision, together with the proposed changes/amendments or alternative policy.

|  |
| --- |
| **Minor impacts are all positive** |

**Timetabling and Prioritising**

Factors to be considered in timetabling and prioritising policies for equality impact assessment.

If the policy has been **‘screened in’** for equality impact assessment, then please answer the following questions to determine its priority for timetabling the equality impact assessment.

On a scale of 1-3, with 1 being the lowest priority and 3 being the highest, assess the policy in terms of its priority for equality impact assessment.

|  |  |
| --- | --- |
| **Priority Criterion** | **Rating (1-3)** |
| Effect on equality of opportunity and good relations | 1 - Lowest Priority |
| Social need | 1 - Lowest Priority |
| Effect on people’s daily lives | 2 - Medium Priority |
| Relevance to a public authority’s functions | 2 - Medium Priority |

Note: The Total Rating Score should be used to prioritise the policy in rank order with other policies screened in for equality impact assessment. This list of priorities will assist the public authority in timetabling. Details of the Public Authority’s Equality Impact Assessment Timetable should be included in the quarterly Screening Report.

Is the policy affected by timetables established by other relevant public authorities?

If yes, please provide details:

|  |
| --- |
| **General spending priorities plus Department for Infrastructure Belfast Rapid Transit project.** |

**PART 4 - MONITORING**

Public authorities should consider the guidance contained in the Commission’s Monitoring Guidance for Use by Public Authorities (July 2007).

The Commission recommends that where the policy has been amended or an alternative policy introduced, the public authority should monitor more broadly than for adverse impact (See Benefits, P.9-10, paras 2.13 – 2.20 of the Monitoring Guidance).

Effective monitoring will help the public authority identify any future adverse impact arising from the policy which may lead the public authority to conduct an equality impact assessment, as well as help with future planning and policy development.

|  |
| --- |
| **As part of on-going work in relation to Translink’s Future Ticketing System, there is ongoing engagement and consultation with people from key groups such as those with a disability, older people, younger people etc.**  **Both IMTAC and Translink’s Future Ticketing System Project team have identified continued engagement as a priority over the time ahead and as the need arises to consult and ascertain views before finalising various aspects of Translink’s Future Ticketing System set-up.**  **Full reports are furnished to the Project Board concerning key matters relating to this document e.g., Accessibility Requirements compliance, engagement with Young People and will continue to be authored and circulated.** |

**PART 5 - APPROVAL AND AUTHORISATION**

|  |  |  |  |
| --- | --- | --- | --- |
| **Policy Title:** | **Translink Future Ticketing System Project** | **Version No:** | **2** |
| **Print Name** | **Position/Job Title** | **Signature** | **Date** |
| **Screened By:** | | | |
| Gareth Watson  Gary Mawhinney | TFTS Project Manager  Business Change Manager - ABT |  | 13/12/2022  13/12/2022 |
| **Approved by:** | | | |
| William McGookin | Head of Ticketing Technology |  | 19/12/2022 |

Note: A copy of the Screening Template, for each policy screened should be ‘signed off’ and approved by a senior manager responsible for the policy, made easily accessible on the public authority’s website as soon as possible following completion and made available on request.

**APPENDIX 1**

|  |  |  |
| --- | --- | --- |
| **Part** | **Part Title** | **Description** |
| **1** | [**Policy Scoping**](#Part1) | Asks public authorities to provide details about the policy, procedure, practice and/or decision being screened and what available evidence you have gathered to help make an assessment of the likely impact on equality of opportunity and good relations |
| **2** | [**Screening Questions**](#Part2) | Asks about the extent of the likely impact of the policy on groups of people within each of the Section 75 categories. Details of the groups consulted and the level of assessment of the likely impact. This includes consideration of multiple identity and good relations issues. |
| **3** | [**Screening Decision**](#Part3) | Guides the public authority to reach a screening decision as to whether or not there is a need to carry out an equality impact assessment (EQIA), or tointroducemeasures to mitigate the likely impact, or the introduction of an alternative policy to better promote equality of opportunity and/or good relations. |
| **4** | [**Monitoring**](#Part4) | Provides guidance to public authorities on monitoring for adverse impact and broader monitoring. |
| **5** | [**Approval and Authorisation**](#Part5) | Verifies the public authority’s approval of a screening decision by a senior manager responsible for the policy. |

Policy Scoping

* Policy
* Available data

Screening Questions

* Apply screening questions
* Consider multiple identities

Screening Decision None/Minor/Major

Mitigate

Publish Template

Re-consider screening

Publish Template for information

Publish Template

EQIA

Monitor

**‘None’**

Screened out

**‘Major’**

Screened in for EQIA

**‘Minor’**

Screened out with mitigation

Concerns raised with evidence

Concerns raised with evidence re: screening decision