

Simplified CTR Application Processing

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**Victoria
Forms**

Welcome

- **Rob Manser**
- Revenues & Benefits Manager

Basildon Council
BASILDON • BILLERICAY • WICKFORD

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Agenda

- Introductions
- About Victoria Forms
- Background to System Development
- Further Developments of the System
- eForm Demonstration
- Coming Soon...
- Why Victoria Forms?
- Summary
- Benefits
- Q&A

About Victoria Forms

- Leading provider of **specialist** Local Authority eForms
- Serving UK Local Authorities **since 2003**
- Supply and support **90+** Local Authorities
- Now supplying **US** Local Government
- In-house Design and Technical Team
- In-house Research & Development
- Crown
Commercial
Service
Supplier

The logo for Victoria Forms, featuring the company name in white text inside a dark blue oval. The background of the slide features abstract blue and white wavy lines at the bottom.

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Background to System Development

- In 2018, Basildon, an existing customer, contacted us for help in developing a simplified way of processing their CTR claims
- Their existing scheme was loosely based on the Council Tax Benefit Scheme
 - 32 Page form
 - Every change had to be notified, with evidence
 - 22 day wait for processing
 - Lots of printed letters and modified bills
- A great deal of administration for frequent small changes



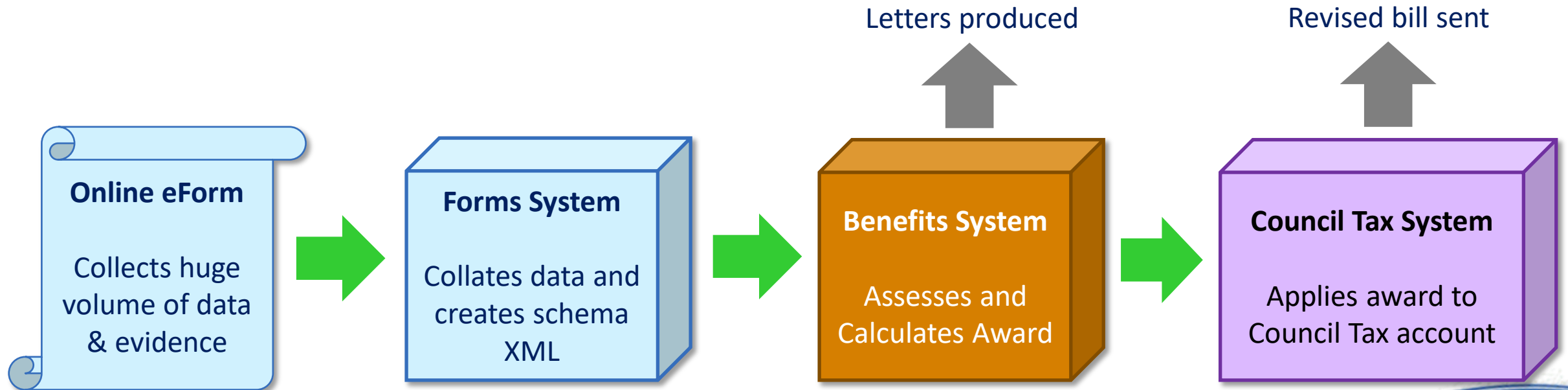
Background to System Development

- Their drivers were:
 - Reduce Admin costs, but not Expenditure
 - Improve the customer journey
 - An increase in UC notifications
 - Due to a reducing benefits caseload, a shift of focus and skilled staff from administering Benefits to Revenues billing & collection

Background to System Development

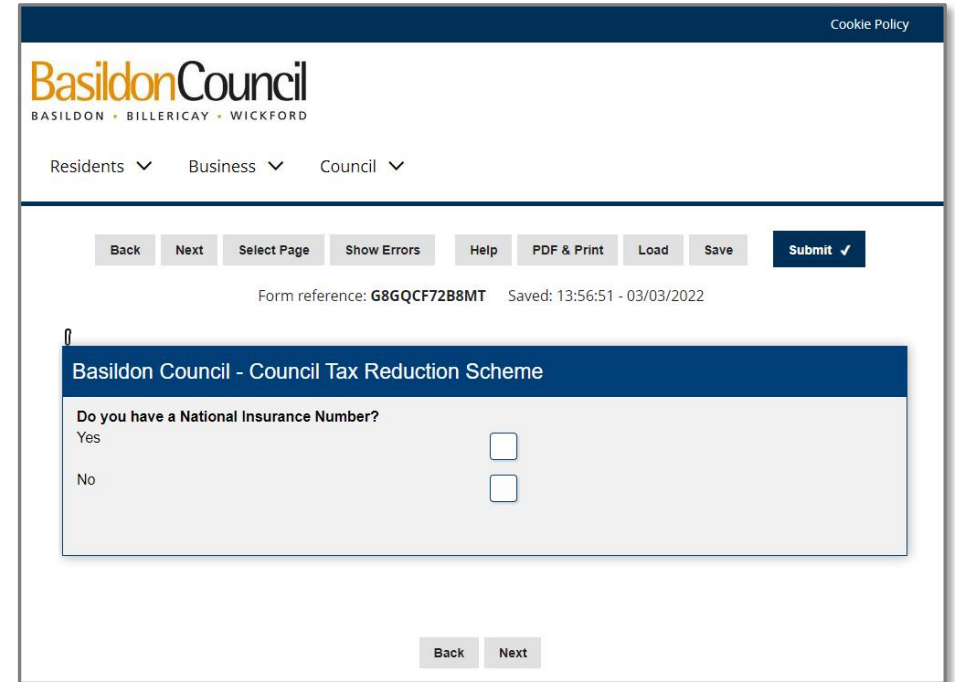
- They looked at CTR as a discount, rather than a benefit
 - CTS stood at **£11.1m**
 - £5.3m of which was for working age applicants, *using the 32 page form etc.....*
 - SPD Expenditure stood at **£10.5m**
 - Only required a *very simple declaration form*
- They wanted to make *radical* changes....
 - To Make CTR as easy as possible for the applicant
 - As easy for staff as SPD.
 - Achieving their four drivers/objectives

Traditional Processing Steps



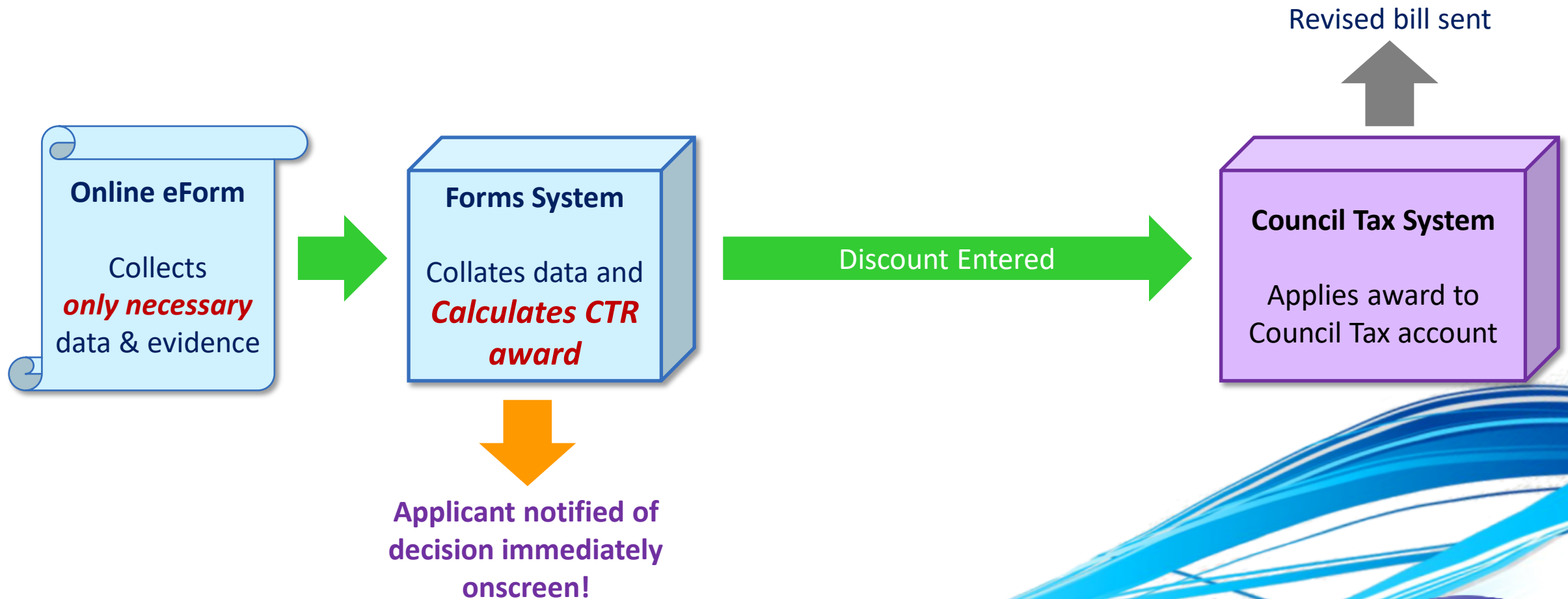
The Outcome for Basildon

- **A Banded Scheme**
 - 6 household types and 5 income bands
- **A 2 Page eForm**
 - Intelligently asking only the relevant questions needed to meet the scheme criteria
- **The eForm includes the scheme algorithm**
 - At submission the award is calculated automatically and communicated to the applicant.
- **The system advises the 2 Character Discount Code**
 - Which non-specialist staff can then apply to the Council Tax account with minimal checking of evidence
- **48 Hour Processing time**
 - Until a new bill is sent, no need for confusing and expensive letters



The screenshot shows the Basildon Council website interface for the Council Tax Reduction Scheme. At the top, the Basildon Council logo is displayed with the text 'BASILDON • BILLERICAY • WICKFORD'. Below the logo, there are navigation links for 'Residents', 'Business', and 'Council'. A 'Cookie Policy' link is in the top right corner. The main content area features a navigation bar with buttons: 'Back', 'Next', 'Select Page', 'Show Errors', 'Help', 'PDF & Print', 'Load', 'Save', and a 'Submit' button with a checkmark. Below this bar, the form reference 'G8GQCF72B8MT' and the save time '13:56:51 - 03/03/2022' are shown. The form title is 'Basildon Council - Council Tax Reduction Scheme'. The first question is 'Do you have a National Insurance Number?' with 'Yes' and 'No' options, each accompanied by a checkbox. At the bottom of the form, there are 'Back' and 'Next' buttons.

Simplified Processing Steps



The Successes for Basildon

- **48 Hour** Processing maintained, even through Covid
- Greatly **reduced printing** Costs
- **Customer Acceptance**
 - Positive survey results
 - Reduced contact
 - No complaints
- **Staff re-trained** and re-skilled
 - Focusing on welfare support, compliance, collection & recovery
- **IRRV Shortlisted** finalists for innovation
- **Scheme supported** through change in leadership
- **Improved collection** rates

Further Development of the Solution

- Custom **eForm** Design
 - To meet the needs of ***any scheme*** rules (Current customers range from 2 pages to 16)
 - Filter questions, to ensure the correct eForm is being filled, or guide applicant elsewhere
- Custom **Algorithm**
 - Again meeting the needs of ***any scheme***, tied to the questions within the eForm
- Custom **Messaging**
 - Onscreen
 - emails
- Custom **Advice**
 - As well as the discount percentage and/or Discount code, the eForm can generate advice, such as:
 - Distance up/down to next band
(*No need to notify changes within these parameters*)
 - Applicants reaching retirement age within the next year
 - Children reaching 18 within the next year

Further Development of the Solution

- **Compatible** with other VF Features & Functions


- Branding to match an Authority's web presence
- Attachments Module
- Advanced DMS Integration
- Address LookUp validation
- Bank Details validation (for Direct Debit)
- Localised Verification Framework
- Statistics Module
- Portal / CRM Integration

- **Stand Alone** or part of a **wider system**

- HB/CTR Claim / Advanced CIC
- Benefits Library
- Revenues Library
- Licensing Libraries
- Back Office Integrations
 - Northgate, Capita, Civica, idox
- VF Creator eForms designer

The screenshot displays a web form for the EPSOM & EWELL BOROUGH COUNCIL. At the top, the council's logo is visible. Below the logo is a navigation bar with buttons: Next, Select Page, Show Errors, Help, PDF, Print, Load, and Save. A section for attachments includes an 'Upload & Attach File' button, a status '0 file(s) attached', and a 'Show / Hide Attachments List' button. The main heading of the form is 'Council Tax Income Discount'. The first section is titled '1. Introductory questions'. It contains two questions, each with 'Yes' and 'No' radio button options. The first question is 'Are you completing this form on behalf of someone else?'. The second question is 'Do you have a National Insurance number?'. A 'Next' button is located at the bottom right of the form.

Demonstration eForm



Next

Select Page

Save

Load

PDF / Print

Help

Show Errors

Upload & Attach File

0 file(s) attached

Show / Hide Attachments List

Drop files here or click to upload.

Council Tax Reduction Scheme

Introductory Questions

Do you have a National Insurance Number?

Yes
☒

No
☐

National Insurance Number

You will need to upload proof of your National Insurance Number before you can submit this form.
This can be a photograph from your smartphone or tablet.
There is a space to upload proof of your National Insurance Number on page 6.

Are you a British Citizen?

Yes
☐

No
☐

Demonstration Form

VF Council Tax Reduction Scheme

Summary

The below information is a summary of the information provided on this form.

Claimant's full name

Mr Eric Young

Claimant's date of birth

16/3/1978

Date claimant becomes pension age

On their 66th birthday (2019 rules): 16/3/2044

Claimant's NI number

NE123456A

Date reduction starts

1/3/2022

Claimant's earnings for Council Tax purposes

£86.77

Partner's full name

Partner's date of birth

Date partner becomes pension age

Partner's s NI number

Children

Number of children you receive Child Benefit for

1

	Name	Date they turn 18
Child One	Emily Young	24/3/2022
Child Two		
Child Three		
Child Four		
Child Five		
Child Six		
Child Seven		
Child Eight		

Important notes for review

CTR Code

3B

Amount from bottom of this band

£11.76

Amount from top of this band

£63.23

One or more of the children in this case is over 17 years old and will be turning 18 soon -

Emily is due to turn 18 years old on 24/3/2022.

PDF

Coming Soon...

- **CTR Management System**

- Store eForm Data
- Record which applications have been applied to the Back Office CT System
- Outstanding Task List
- Review planning, based on scheduled events
 - Birthdays
 - Retirements
 - Reaching 18
- Forecasting / Modelling
 - Sliding scales for system parameters
 - Sample or whole data

The screenshot displays the CTR System interface. On the left is a sidebar menu with options: Home, Manage Accounts, People, Addresses, Employers, Pending Imports, Manage Users, Manage System (expanded), User Groups, Data Export, and Profile. The main content area is divided into two sections. The top section, titled 'HOUSEHOLD MEMBERS', contains a table with columns: First Name, Surname, Role, Start Date, End Date, D.O.B., and National Insurance Number. It lists two members: Barry Young (Claimant, 6 December 1964, NI:123456A) and Eric Jones (Dependant, 17 May 2018). Below the table are buttons for 'Add existing Household Member' and 'Create new Household Member'. The bottom section, titled 'SCHEMES', shows a 'Demo CTR Scheme' for the year '2020-21'. It includes a table with columns: Period, Partner, Income Support, Over £6k, Total Earnings, Children < 18, Band, Reduction, and Status. The table lists monthly periods from April 2020 to March 2021, with consistent values for most columns and a 'Nothing applied' status. At the bottom left of the interface is the 'Victoria Forms' logo, and at the bottom right is a 'Victoria Forms' logo in a blue oval.

First Name	Surname	Role	Start Date	End Date	D.O.B.	National Insurance Number
Barry	Young	Claimant			6 December 1964	NI:123456A
Eric	Jones	Dependant			17 May 2018	

Period	Partner	Income Support	Over £6k	Total Earnings	Children < 18	Band	Reduction	Status
April 2020 (01/04/2020 - 30/04/2020)	x	x	x	£0.00	1	3A	75%	Nothing applied
May 2020 (01/05/2020 - 31/05/2020)	x	x	x	£0.00	1	3A	75%	Nothing applied
June 2020 (01/06/2020 - 30/06/2020)	x	x	x	£0.00	1	3A	75%	Nothing applied
July and August 2020 (01/07/2020 - 31/08/2020)	x	x	x	£0.00	1	3A	75%	Nothing applied
August 2020 (01/08/2020 - 31/08/2020)	x	x	x	£0.00	1	3A	75%	Nothing applied
September 2020 (01/09/2020 - 30/09/2020)	x	x	x	£0.00	1	3A	75%	Nothing applied
October 2020 (01/10/2020 - 31/10/2020)	x	x	x	£0.00	1	3A	75%	Nothing applied
November 2020 (01/11/2020 - 30/11/2020)	x	x	x	£0.00	1	3A	75%	Nothing applied
December 2020 (01/12/2020 - 31/12/2020)	x	x	x	£0.00	1	3A	75%	Nothing applied
January 2021 (01/01/2021 - 31/01/2021)	x	x	x	£0.00	1	3A	75%	Nothing applied
February 2021 (01/02/2021 - 28/02/2021)	x	x	x	£0.00	1	3A	75%	Nothing applied
March 2021 (01/03/2021 - 31/03/2021)	x	x	x	£0.00	1	3A	75%	Nothing applied

Why Victoria Forms?

- **19 Years experience** of Local Authority eForms
- Built on **proven technology**
- **Proven delivery** of projects
- **In-house** development & Forms Design Teams
- **Rapid development** of Custom solutions
- **Personal Service**
- Customers as **Partners**

Summary

- Custom **eForm** designed to ask only the necessary questions
- Custom **Algorithm** built into the eForm
- **Instant decision** indicated to the applicant, and ready to enter into Council Tax back office
- Custom **Advice** on potential review items
- **CTR Management system** coming soon, to aid reviews, forecasting & modelling

Benefits

- Greatly **improved customer journey**
 - Significantly shorter eForm
 - Reduced evidence collection
 - Instant decision
- Little or **no assessment** required, output is a data-entry task
 - Directly into CT system, as code or percentage
- **Refocus skilled staff**
 - Improve welfare support and collections
- **Balance** admin costs to expenditure levels
- **Reduced printing & postage costs**

Q & A?



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Thank you for your time!



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