Simplified CTR Application Processing

Barry Young
Business Development Manager

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Victoria Forms

Welcome

- **Rob Manser**

- Revenues & Benefits Manager

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

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About Victoria Forms

o Leading provider of **specialist** Local Authority eForms

o Serving UK Local Authorities **since 2003**

o Supply and support **90+** Local Authorities

o Now supplying **US** Local Government

o In-house Design and Technical Team

o In-house Research & Development

o Crown
  Commercial
  Service
  Supplier

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Background to System Development

o In 2018, Basildon, an existing customer, contacted us for help in developing a simplified way of processing their CTR claims

o Their existing scheme was loosely based on the Council Tax Benefit Scheme
  - o 32 Page form
  - o Every change had to be notified, with evidence
  - o 22 day wait for processing
  - o Lots of printed letters and modified bills

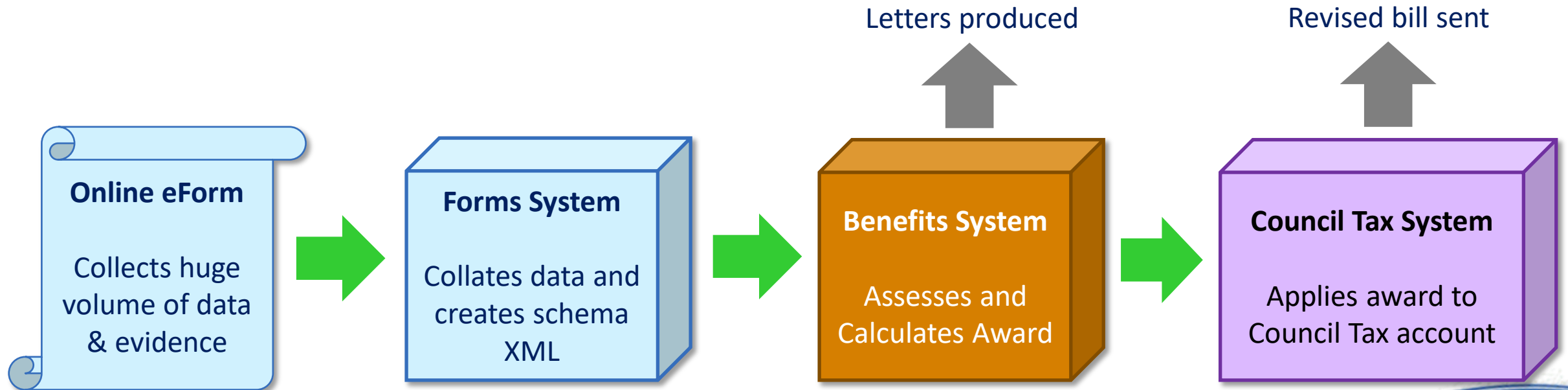o A great deal of administration for frequent small changes

Background to System Development

o Their drivers were:

  o Reduce Admin costs, but not Expenditure

  o Improve the customer journey

  o An increase in UC notifications

  o Due to a reducing benefits caseload, a shift of focus and skilled staff from administering Benefits to Revenues billing & collection

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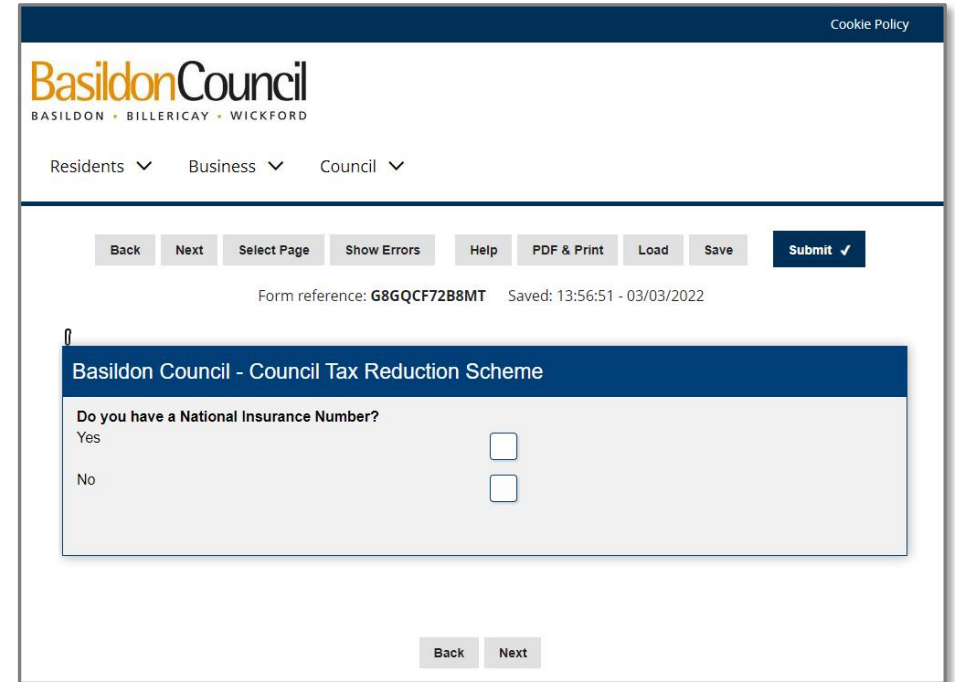
Background to System Development

o They looked at CTR as a discount, rather than a benefit

    o CTS stood at **£11.1m**

        o £5.3m of which was for working age applicants, ***using the 32 page form etc……***

    o SPD Expenditure stood at **£10.5m**

        o Only required a ***very simple declaration form***

o They wanted to make ***radical*** changes….

    o To Make CTR as easy as possible for the applicant

    o As easy for staff as SPD.

    o Achieving their four drivers/objectives
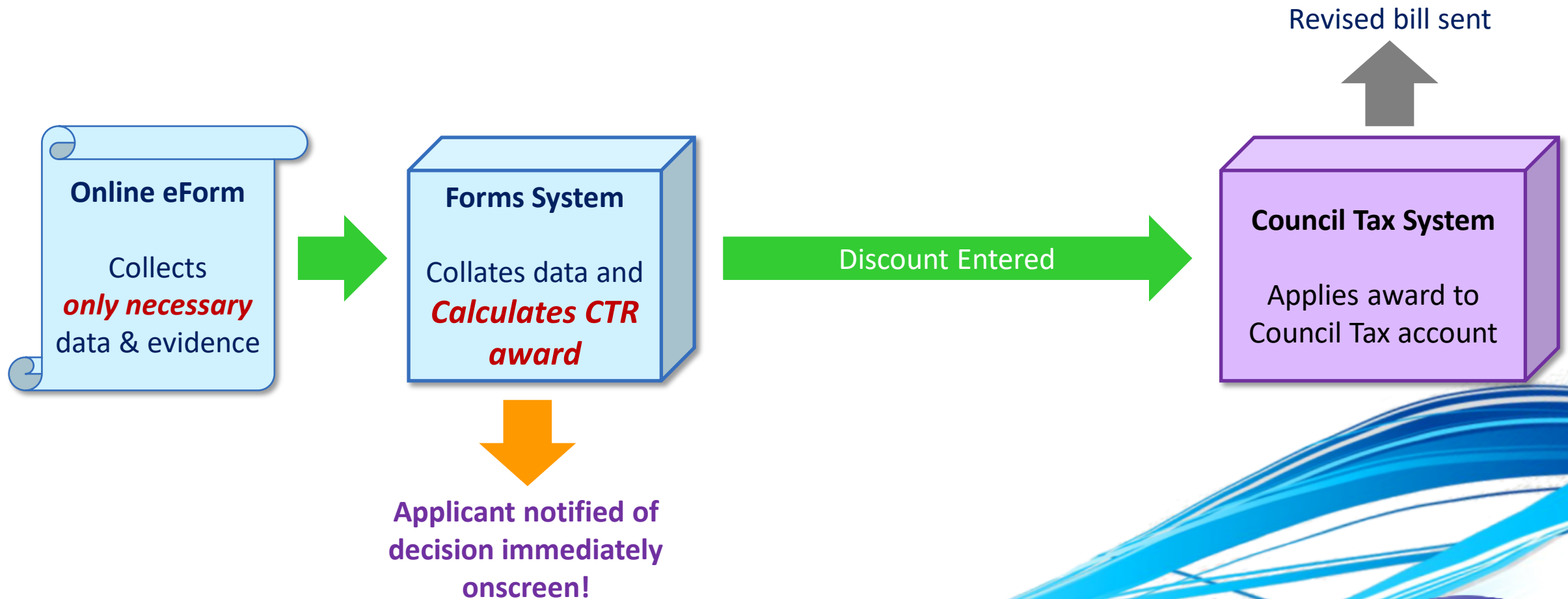
Traditional Processing Steps

Letters produced

Revised bill sent

Online eForm

Collects huge volume of data & evidence

→

Forms System

Collates data and creates schema XML

→

Benefits System

Assesses and Calculates Award

→

Council Tax System

Applies award to Council Tax account

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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

Simplified Processing Steps

Online eForm

Collects *only necessary* data & evidence

Forms System

Collates data and *Calculates CTR award*

Discount Entered

Council Tax System

Applies award to Council Tax account

Revised bill sent

Applicant notified of decision immediately onscreen!

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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

o Custom **eForm** Design

- o To meet the needs of *any scheme* rules (Current customers range from 2 pages to 16)
- o Filter questions, to ensure the correct eForm is being filled, or guide applicant elsewhere

o Custom **Algorithm**

- o Again meeting the needs of *any scheme*, tied to the questions within the eForm

o Custom **Messaging**

- o Onscreen
- o emails

o Custom **Advice**

- o As well as the discount percentage and/or Discount code,
  the eForm can generate advice, such as:
  - o Distance up/down to next band
    (*No need to notify changes within these parameters*)
  - o Applicants reaching retirement age within the next year
  - o Children reaching 18 within the next year

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Further Development of the Solution

o **Compatible** with other VF Features & Functions
- o Branding to match an Authority's web presence
- o Attachments Module
- o Advanced DMS Integration
- o Address LookUp validation
- o Bank Details validation (for Direct Debit)
- o Localised Verification Framework
- o Statistics Module
- o Portal / CRM Integration

o **Stand Alone** or part of a **wider system**
- o HB/CTR Claim / Advanced CIC
- o Benefits Library
- o Revenues Library
- o Licensing Libraries
- o Back Office Integrations
  - o Northgate, Capita, Civica, idox
- o VF Creator eForms designer

Demonstration eForm

Demonstration Form

VF Council Tax Reduction Scheme

Summary

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

Claimant

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

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.

Coming Soon…

o **CTR Management System**
  - o Store eForm Data

  - o Record which applications have been applied to the Back Office CT System

  - o Outstanding Task List

  - o Review planning,
    based on scheduled events
    - o Birthdays
    - o Retirements
    - o Reaching 18

  - o Forecasting / Modelling
    - o Sliding scales
      for system parameters
    - o Sample or whole data

Why Victoria Forms?

o **19 Years experience** of Local Authority eForms

o Built on **proven technology**

o **Proven delivery** of projects

o **In-house** development & Forms Design Teams

o **Rapid development** of Custom solutions

o **Personal** Service

o Customers as **Partners**

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Summary

o Custom **eForm** designed to ask only the necessary questions

o Custom **Algorithm** built into the eForm

o **Instant decision** indicated to the applicant,
  and ready to enter into Council Tax back office

o Custom **Advice** on potential review items

o **CTR Management system** coming soon,
  to aid reviews, forecasting & modelling

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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

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Q & A?

Thank you for your time!