

## **eRevenues**

eRevenues is a rules based system that can be used to process changes in circumstance for Council Tax.

It can be used by members of the public directly or by a trusted third party (e.g. call centre, neighbourhood office, or landlord) who can conduct an interview on their behalf.

The data that is captured can be securely transported to the back office and used to directly update the citizen's account.

eRevenues can be run in 2 modes; Public & Authenticated

### **Public (Self Serve)**

The Public version of eRevenues guides the customer through an interview to obtain all the required information regarding a change in circumstances relating to their Council Tax. Information relating to changes of address can be provided by an owner, tenant, landlord, or agent and the questions in the interview are tailored accordingly. The citizen is taken through a series of 'intelligent' questions, where the next page of questions is determined by the answer provided to the previous set of questions. This ensures that interviewee is only asked relevant questions and the interview is completed as quickly as possible.

This is a fully web based system. eRevenues can be accessed through a link on the website of the Local Authority, and allows the citizen to choose when they communicate with the Local Authority.

The screens are designed in a citizen friendly way with help available at any given point. The Local Authority can also create their own help text to reflect local circumstances.

The information collected is validated and passed through to the Northgate Revenues application removing the need to manually re-key in the data.

The types of notifications that a citizen can carry out are:

- A move into the Local Authority Area
- A move out of the Local Authority Area
- A move within the Local Authority Area
- An application for Single Person Discount
- An request to cancel an entitlement to Single Person Discount
- A change of Name
- An application for Direct Debit.

The citizen is not required to authenticate themselves to use eRevenues, the citizen merely completes a notification which is submitted to the back office for automatic update of the revenues system, provided validation rules have been met. If validation is not met, the automated processing of the notification will fail, and a member of staff can process the changes once the necessary checks have been carried out. Throughout the notification, no personal details will be exposed to the citizen.

eRevenues provides documents to confirm the changes which will be submitted. This is in the form of a known facts document and / or Direct Debit Instruction. These can both be saved or printed by the citizen and exported to the Local Authority's Document Management System or similar for reference.

### **Authenticated**

The Authenticated version of eRevenues will allow a member of staff at the Local Authority to log into the eRevenues and process changes in Council Tax liability.

The login details will be recorded against the notification so that an audit trail is set showing that the notification was submitted by a member of staff.

In addition, the user name details from the login will be set in the back office to provide an audit trail in the Northgate Council Tax.

**Key messages**

- The transactions available through eRevenues gives clients and the public the flexibility to both self-serve and get the help they require. This in turn improves customer service by making individuals more empowered.
- Improved the quality of the service – No queuing or lengthy phone calls.
- Channel Shift transactions from back to front office, resulting in:
  - reduced telephone calls,
  - reduced paper & scanning from correspondence
- Cost Savings from reduced back office processing and customer intervention.
- Proactively encourages & promotes take up of Direct Debit applications which will ultimately improve cash collection.
- Improved information collection, questions asked that would not normally be provided in telephone calls or correspondence, as eRevenues will never forget a question.
- Access to Local Authority services 24/7
- Speed of Billing – Accurate information is used to produce bills that are right first time resulting in improved cash flow and fewer queries.
- Public option encourages take up – Citizens might be discouraged in using the service if they had to authenticate themselves.
- eRevenues is accountable as all information taken in the notification is stored and can be retrieved at any time.
- Flexible and comprehensive and will only ask questions that are relevant, but also have inbuilt intelligence to ask for enough information to establish liability for occupied and unoccupied periods.

 <p>Moves in, out &amp; within an LA, applications for Single Person Discount and Direct Debit.</p>	 <p>Rules Based, Expert System for Non Expert Users</p>	 <p>Sister product to eBenefits</p>	 <p>Can be deployed in Self Service and / or Assisted modes</p>
 <p>Developed in partnership with London Borough of Sutton</p>	 <p>Integrated with R+B &amp; DMS through standard API's</p>	 <p>Competition</p>	<p>Merge with eBenefits</p> <p>Integrate eServices</p> <p>Futures</p>

Figure 1: eRevenues in a nutshell

## eBenefits

eBenefits is a rules based system that can be used to process new claims and changes in circumstance for Housing Benefit and Council Tax Benefit.

It can be used by members of the public directly or by a trusted third party (e.g. call centre, neighbourhood office, or landlord) who can conduct an interview on their behalf.

The data that is captured can be securely transported to the back office and used to directly create or update the citizen's benefit claim.

In March 2013, eBenefits will be modified to allow applications and changes in circumstance for Council Tax Support (mapped onto an authorities' local schemes and retrospective applications for CTB)

eBenefits can be run in 2 modes; Public & Assisted.

### Public (Self Serve)

eBenefits Self Serve allows citizens to check eligibility to HB / CTB on line, register an intention to claim benefit, submit a benefit claim to the Local Authority or use it just for information/what if calculations. Citizens can also inform the authority of any changes in circumstance.

A citizen can access the eBenefits Self Serve module via the Council's web site to undertake a new benefit calculation or retrieve a saved calculation, as shown below.

The screenshot shows the 'Online Benefits Calculator' interface. At the top, it says 'Welcome' and provides instructions on who can claim benefits. Below this, there are two main options: 'New Benefit Calculation' and 'Retrieve Saved Calculation'. The 'New Benefit Calculation' option is selected, showing a dropdown menu with 'Housing Benefit & Council Tax Benefit' and a 'Start' button. The 'Retrieve Saved Calculation' option has a 'Retrieve' button. The footer of the page includes '© Northgate Public Services'.

**Figure 2:** eBenefits Self Serve initial screen for starting a benefit claim.

eBenefits Self Serve is an intelligent, rule-based application, which dynamically displays questions based on data already entered. In this way the citizen only has to answer questions relevant to the claim. For example, the citizen will not be required to enter a partner's income if a partner has not been indicated within the household. The citizen will complete questions regarding their circumstances including household/income/housing costs and so on as shown in the various screenshots below.

**Online Benefits Calculator**

Step 1 Step 2 Step 3 Step 4 Step 5

**Questions screen**

**Name details**

Title  ⓘ

Forename  ⓘ

Surname  ⓘ

Gender  ⓘ

Date of birth  ⓘ

National insurance number  ⓘ

Key | \*required field | ⓘhelp information

**Enter/Continue**  
Click 'Enter/Continue' to enter your information and progress through the questions.

**View Answers**  
Click 'View Answers' for a list of all the questions you have answered so far.

**Exit/Save**  
Click 'Exit/Save' to leave the calculation and save if required.

Figure 3: Citizen's personal details.

**Online Benefits Calculator**

Step 1 Step 2 Step 3 Step 4 Step 5

**Questions screen**

**Address details**

Please enter the address you are claiming benefit for

Address line 1  ⓘ

Address line 2  ⓘ

Address line 3  ⓘ

Address line 4  ⓘ

Address line 5  ⓘ

Address postcode  ⓘ

Key | \*required field | ⓘhelp information

**Enter/Continue**  
Click 'Enter/Continue' to enter your information and progress through the questions.

**View Answers**  
Click 'View Answers' for a list of all the questions you have answered so far.

**Exit/Save**  
Click 'Exit/Save' to leave the calculation and save if required.

Figure 4: Citizen's address details.

**Online Benefits Calculator**

Step 1 Step 2 Step 3 Step 4 Step 5

**Questions screen**

**General questions**

Have you lived continuously in the United Kingdom for at least five years?  Yes  No ⓘ

Do you live at this address as your normal home?  Yes  No ⓘ

Do you make payments for another home somewhere else?  Yes  No ⓘ

Are you currently absent from home?  Yes  No ⓘ

Key | \*required field | ⓘhelp information

**Enter/Continue**  
Click 'Enter/Continue' to enter your information and progress through the questions.

**View Answers**  
Click 'View Answers' for a list of all the questions you have answered so far.

**Exit/Save**  
Click 'Exit/Save' to leave the calculation and save if required.

Figure 5: General questions for the citizen to complete.

Figure 6: Details of the citizen’s income/savings etc.

At the end of the application process, a summary screen will displayed, as shown below, of the citizens potential entitlement to benefit.

Figure 7: Summary screen displaying potential benefit entitlement.

At this point, the citizen can submit the claim to the Council which will result in the production of two documents:

- ‘Your Answers’ provides details of all the questions asked and responses given in the assessment.
- The declaration document which can be used to capture the claimant’s signature to return to the LA if required to support their claim.

The citizen is also provided with details of the evidence that will be required to support their claim along with any other further guidance and advice that the Council may chose to give to its citizens.

Claims submitted through eBenefits Self Serve can be exported directly into the back office and the documents produced as part of the application process will also be exported into the DMS.



Once the export is undertaken Northgate Benefits will automatically create a claim and set it to pending, to prevent the automatic calculation of the claim until all supporting evidence is received. This automatic creation of the claim reduces the need to rekey the data collected from the citizen.

### **Assisted**

The Council may also wish to consider the optional assisted eBenefits module, which provides for an assisted interview to capture data from the citizen and then pre-populate the answers into a standard claim form.

As with the Self Serve module, assisted eBenefits utilises the rule base which simplifies the claim process by guiding the user and customer through an interview where only relevant questions are asked. Once the form is complete, the details can be immediately exported to the Benefits solution and a claim created. Again, the claim will be set to pending to prevent the automatic calculation of the claim until all supporting evidence is received. This removes the need to use a trained assessor to input case details and also increases accuracy as the case details are directly taken from the claim form.

Assisted eBenefits also includes a High-Level Eligibility module. The functionality provided includes calculating potential entitlement to around 60 + state benefits such as child benefit, child tax credits, carer's allowance, incapacity benefit, and so on using the same information captured for the Housing/Council Tax benefit application.

### **Key messages**

- The transactions available through eBenefits gives clients and the public the flexibility to both self-serve and get the help they require. This in turn improves customer service by making individuals more empowered.
- Improved the quality of the service – No queuing or lengthy phone calls.
- Channel Shift transactions from back to front office, resulting in:
  - reduced telephone calls,
  - reduced paper & scanning from correspondence
- Cost Savings from reduced back office processing and customer intervention.
- Improved information collection, questions asked that would not normally be provided in telephone calls or correspondence, as eBenefits will never forget a question.
- Access to Local Authority services 24/7
- Speed of Processing – eBenefits can be adopted to deliver a fast, streamlined service consistent with 'lean' thinking principles.
- Public option encourages take up – Citizens might be discouraged in using the service if they had to authenticate themselves.
- eBenefits is accountable as all information taken in the notification is stored and can be retrieved at any time.
- Flexible and comprehensive and will only ask questions that are relevant, but also have inbuilt intelligence to ask for enough information to fully gather, validate and verify a new claim or change in circumstances

 <p>On Line form, initially part of the National Benefits Project</p>	 <p>Handles claims for HB &amp; CTB (New Claims &amp; Changes in Circumstances)</p>	 <p>Rules Based, Expert System for Non Expert Users</p>	 <p>Can be deployed in Self Service and / or Assisted modes</p>
 <p>Integrated with R+B &amp; DMS through National Benefits Schema</p>	 <p>Deployed by 60 customers using a variety of business models</p>	 <p>Competitive Market</p>	<ul style="list-style-type: none"> <li>■ Enhance to calculate CTS</li> <li>■ Merge with eRevenues</li> </ul> <p>Futures</p>

Figure 8: eBenefits in a nutshell

**eServices**

The eServices module has been successfully implemented by a number of customers including Torfaen County Borough Council.

The solution includes the Citizen Services module which provides for citizens to access on-line services through a configurable front end. Real time integration with the back office provides information on Revenues and Benefits and the ability to update that information through the standard forms provided. The standard services provided are:

- Council Tax band enquiries including gross charge.
- Council Tax & NNDR account enquiries.
- Council Tax & NNDR eBilling.
- Benefit entitlement enquiries.
- Benefit Change of Circumstances.
- Direct Debit applications.
- Single Person Discount applications.
- Contact us.
- Registration & authentication through the Council’s preferred option such as Government Connect, or Northgate’s Self Service Module.





 <p>Authenticated citizen view of R+B information (eBilling, Statements of Account etc)</p>	 <p>Customisable Web Pages built using Front Office Workbench</p>	 <p>Secure access through registration / authentication component</p>	 <p>Full history of all billing &amp; recovery notices and transactions</p>
 <p>Combination of authenticated &amp; unauthenticated services with audit trail</p>	 <p>Integrated with R+B through standard API's</p>	 <p>Competition</p>	<p>Subsume into eRevenues</p> <p>Futures</p>

Figure 8: eServices in a nutshell

**Landlord & Bailiff Portals**

As an extension to Citizen Services, Northgate have developed a number of portals that allow trusted third parties to integrate with Northgate Revenues and Benefits.

- The Landlord Portal to allow landlords access to information via the Internet using a secure logon.

The Bailiff Portal allows bailiffs to view real time information relevant to them and cut down on duplication by allowing them some update privileges (e.g. notepads, bailiff returns)