Integrated Digital Forms for Revenues & Benefits

Service Definition

Crown
Commercial
Service
Supplier

Contents

Introduction

IEG4 is a UK-based digital transformation specialist with a long history of delivering cloud-based solutions to local authorities and the wider public sector. Our focus is on simplifying complex processes, improving citizen engagement, and reducing administrative overheads through intuitive online services and intelligent workflow automation.

For more than two decades, councils across the UK have relied on IEG4 to deliver scalable, secure, and user-friendly platforms that support day-to-day service delivery. Our experience spans Revenues & Benefits, finance, social care, and planning, with solutions designed to integrate cleanly with existing back-office systems. This approach ensures compatibility, predictable implementation, and measurable improvements in both operational efficiency and customer experience.

IEG4 provides strong integration capabilities with leading Revenues & Benefits and line-of-business systems used by councils. Using open standards and well-established APIs, digital services can securely exchange data in real time with back-office applications. This supports faster processing, reduces manual handling, and helps councils deliver a more joined-up experience for residents.

At the centre of the solution is IEG4's extensive library of Revenues & Benefits digital forms and workflows. These are designed around legislative requirements and real council processes, enabling high levels of automation while maintaining data quality and control. Intelligent validation, routing, and status tracking reduce avoidable contact and support consistent outcomes for both citizens and staff.

By adopting IEG4 as part of their digital service delivery approach, councils gain a proven platform that connects online services directly to operational systems. This ensures transactions flow smoothly into the applications teams rely on every day, supporting efficient service delivery and a more coherent digital experience for residents.

Revenues & Benefits forms

Benefits/Welfare forms

IEG4's Benefits services are among the most advanced and intelligent solutions available to councils. They combine full legislative compliance with deep technical expertise, enabling citizens to apply for or report changes quickly and easily. All data, content, and supporting documentation are seamlessly integrated into back-office applications, reducing manual effort and improving accuracy.

eClaim - Housing Benefit & Council Tax Support

IEG4's eClaim solution allows citizens to apply for:

- Housing Benefit
- Local Council Tax Support/Reduction/Discount
- Free School Meals/School Clothing Allowance

With an intuitive and dynamic design, eClaim automatically scales to reflect the citizen's circumstances. This ensures the number of pages is kept to a minimum where cases are simple, while automatically expanding to capture the necessary information for more complex claims.

Key features include:

- Dynamic validation – errors such as an incorrect National Insurance number are clearly highlighted to ensure accurate data submission.
- Contextual help – guidance can be edited and accessed easily, with help buttons available against every question.
- Contextual questioning – where a child is added, the form intelligently expands to capture relevant expenses such as childcare costs and, if criteria are met, allows the citizen to apply simultaneously for Free School Meals.

Local Council Tax Support (LCTS)

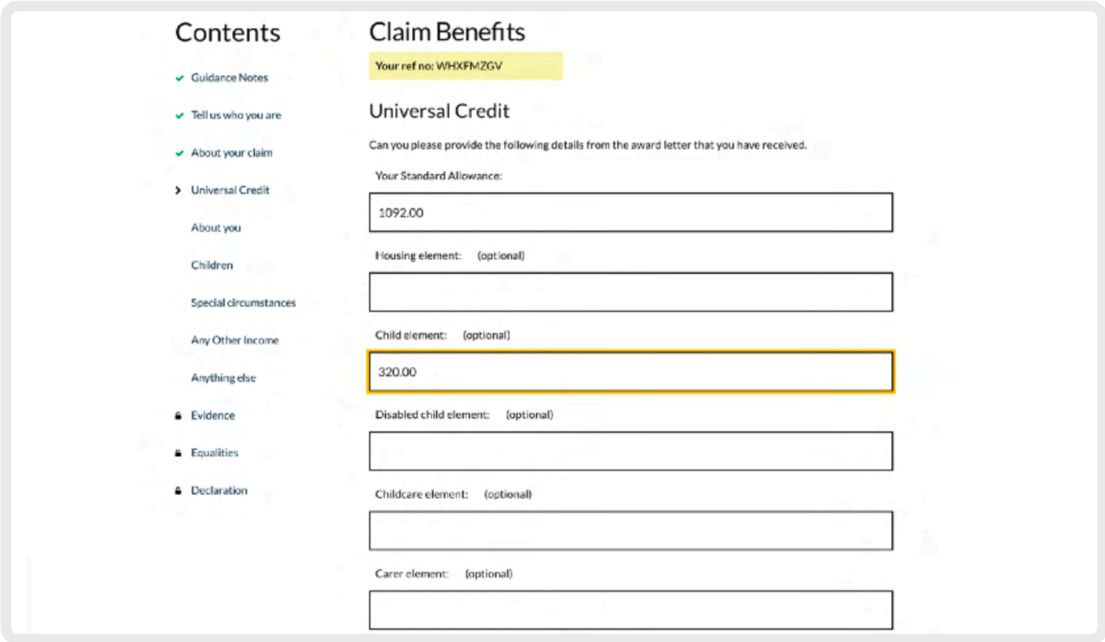
The eClaim solution adapts to the unique requirements of each council's LCTS scheme through configurable settings, allowing you to:

- Request proof of capital, even where a person is 'passported', if local capital thresholds are below the standard £16,000 level.
- Identify whether the applicant is in a 'vulnerable' group (e.g. receiving Personal Independence Payment or caring for a child under five), ensuring correct exemptions are applied.
- Define different maximum periods for backdating claims.

The form also automatically detects pension age using the applicant's date of birth and pension equalisation rules, ensuring working-age-specific LCTS regulations are applied correctly.

Universal Credit

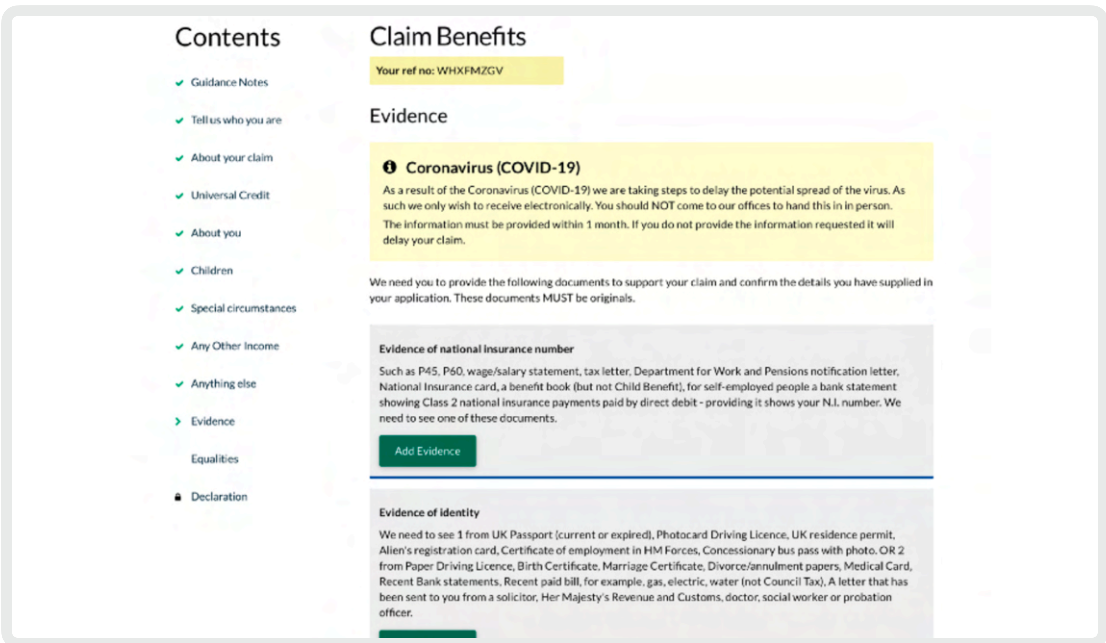
To provide councils with the fullest possible information, eClaim includes a dedicated Universal Credit page. Designed to mirror the exact layout of the UC award letter, it captures all relevant UC award details, giving assessment officers a clear and accurate view of the claimant's circumstances and enabling more informed decision-making.



The form also incorporates dynamic behaviour to ensure citizens are only asked relevant questions. For example, if an applicant confirms they have applied for or are in receipt of Universal Credit, questions relating to tenancy, landlord details, or housing benefit payment are automatically bypassed unless the claimant falls within an exempt group (e.g. those in Supported Accommodation).

Additionally, configurable settings allow councils to request proof of Universal Credit on the evidence page where required, ensuring flexibility to meet local policy and verification needs.

Dynamic Evidence



Evidence Management

Applicants are able to provide supporting information online, with the form intelligently tracking what has and has not been supplied. Upon submission, the system automatically informs the applicant of any outstanding items.

For example, if five pieces of evidence were requested and four uploaded, the system will flag the remaining item as still required. The applicant can then return within a defined timeframe (typically one month) to upload the outstanding evidence, which is then passed directly into the EDMS.

To provide maximum flexibility, a 'catch-all' upload option is also available, allowing citizens to submit additional or replacement documents, for example, where earlier evidence was deemed insufficient. This ensures the process remains fully digital and avoids unnecessary delays.

Calculator

IEG4's benefit calculator is built directly into the eClaim and can be used either as a standalone tool or as an optional precursor to a full application. It enables citizens to quickly establish whether they may be eligible for:

- Housing Benefit
- Local Council Tax Support (LCTS)
- Council Tax Discount under a banded scheme (LCTD)

Unlike generic calculators, IEG4's solution is fully configurable to reflect each council's specific scheme rules. Key features include:

- **Universal Credit awareness** – calculates LCTS only, unless the claimant lives in exempt accommodation.
- **Pension equalisation rules** – ensures applicable amounts are calculated in real time.
- **Social Sector Size criteria (Bedroom Tax)** – applies the correct 14% or 25% reductions automatically.

At the end of the calculation, the citizen receives a clear breakdown of their potential eligibility and is presented with three options:

1. **Start an online application** using the data already provided.
2. **Run another calculation** with the existing details to test "what if" scenarios.
3. **Begin a new calculation** from scratch.

This approach not only improves accuracy but also gives citizens confidence in their potential entitlement before committing to a full application—reducing abandoned claims and ensuring better informed submissions.

Self-employed Functionality

Self-employed claims are often the most challenging to administer, owing to the complexity of benefit calculations, the variability of income, and the need to assess earnings on a weekly basis. To address this, the eClaim includes a dedicated self-employed module that enables councils to process even the most complex claims with speed and accuracy.

Key capabilities include:

- Earnings calculation across multiple income categories and payment frequencies.
- Expenditure assessment based on configurable council-defined rules, covering both allowable and disallowed expenses.
- Forecasting tools for newly established businesses, allowing projected income and expenditure to be captured.
- Minimum wage validation to determine where income falls below statutory thresholds, ensuring accurate entitlement decisions.

At the end of the process, the citizen is returned seamlessly to the main online form and provided with a PDF copy of their self-employed assessment, which is automatically appended as supporting evidence. This ensures complex claims can be administered with the same efficiency as standard ones, reducing delays and manual intervention.

Fast Track Functionality

The Fast Track feature within eClaim empowers citizens to provide all supporting evidence at the point of submission, enabling their claim to be processed significantly faster than through standard service-level agreements (SLAs).

- Citizens can choose between standard processing or the Fast Track route.
- Where Fast Track is selected, councils can inform citizens of the expected accelerated turnaround time.
- From day one, councils receive all the evidence needed to process the claim, eliminating the back-and-forth that typically slows down applications.

This dual benefit means citizens experience quicker decisions, while councils gain operational efficiencies and improved first-time-right processing.

Enhanced EDMS integration for Fast Track

To ensure seamless workflow, Fast Track claims are deeply integrated with the council's EDMS. Upon submission, the system automatically flags:

1. Whether the application/change is Fast Track or standard.
2. The specific type of evidence submitted, with an indicator showing whether it is linked to a Fast Track claim/change.

This enhanced integration ensures council officers can instantly identify and prioritise Fast Track submissions, reducing manual sorting and ensuring claims are actioned with maximum efficiency.

Back-office Integration

The eClaim is capable of integrating to the following back-office applications using national benefit schema (which IEG4 is the custodian of) driven APIs:

- NEC (Northgate)
- Capita (MRI)
- Civica

EDMS Integration

The eClaim is capable of and has proven integration to the following widely used back-office EDM applications:

- NEC Document Management (previously Information@Work)
- Civica W2/360/Comino
- Civica Workflow
- IDOX
- OpenText
- ICLipse
- IEG4 Workflow

Reporting Functionality

eClaim comes with rich Power BI enabled reports.

The reports available are:

Summary

This report provides a dashboard with:

- Numbers or completed forms vs incomplete
- % where integration was successful
- Forms by gender
- By Channel
- % breakdown by risk category

Owing to the interrelationships in place within the dashboard, it is possible to filter the dashboard by clicking on segments of the donut charts.

Year-on-year analysis

To enable Benefit managers to measure the transformation of their services and of impacts of legislative changes (such as the introduction of Universal Credit) there is a year-on-year analysis report.

Again, this provides the means to click on a given month and filter the results, as well as see trends on numbers. The data can be viewed in a table and exported to CSV for interpretation in Microsoft Excel etc.

General analysis

The general analysis report enables Benefit managers to see the breakdown of:

- Age groups
- Session duration i.e. from when they started the form to when they submitted it
- The number of pages visited during the completion of the eClaim
- The ethnic groups
- The operating system in use, which aids understanding of devices in use e.g. iPhone

- Browser in use, which again helps with understanding those in use to understand device types
- Who completed the claim - such that an understanding of genuine channel shift can be understood
- The different genders (Unknown will be present where gender is optional in your form)

Geographical analysis

Being able to understand the areas (Council wards) where you are receiving the greatest volumes of claims ensures that relevant councillors are aware and that communications can be targeted most effectively.

Risk analysis summary

With this report Benefit Managers can see at a glance, how their risk profiling has changed over time.

Risk analysis breakdown

With this set of visuals, the Council is able to see how risk is portrayed across different metrics like age groups, gender, who completed it.

Incomplete Forms analysis

With this report the council is able to see which pages claimants are abandoning the form on. The overwhelming number of people are only looking at the guidance notes and not proceeding. This illustrates that the bulk of people that started but did not complete it did not actually intend to progress with their claim but provide focus on those that have.

Integration Error analysis

This report allows one to see the numbers by form access method and the specific reasons for failures over time.

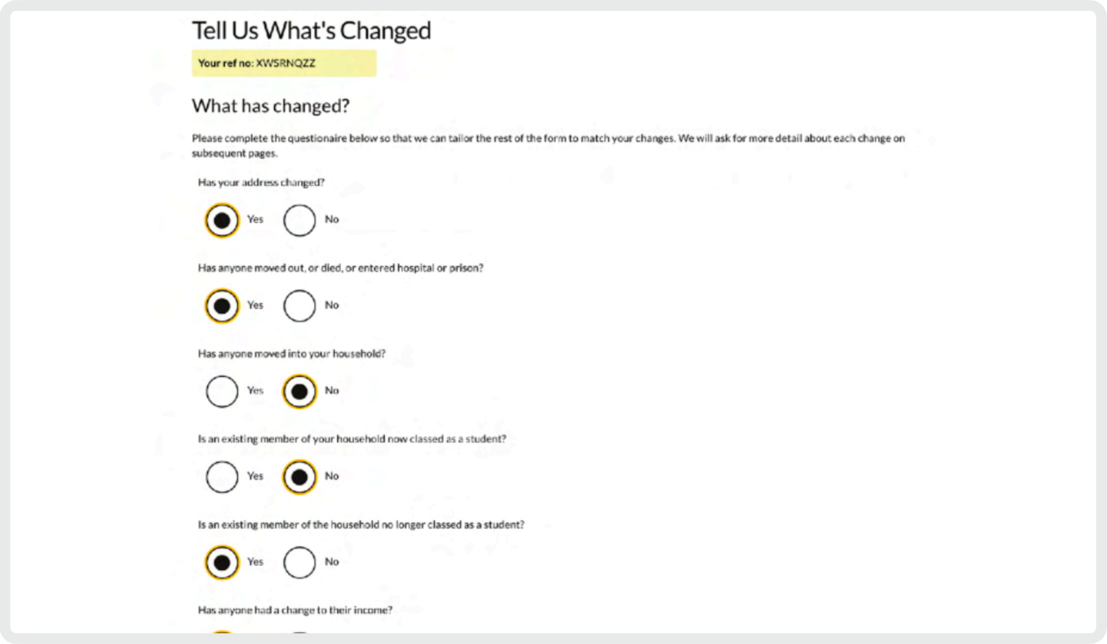
Average page duration analysis

This report provides the council with the means to see which pages are taking longest to complete and therefore provide the basis for reviewing the content of these and potentially updating them using the built-in edit mode features of eClaim.

eChanges - Housing Benefit & Council Tax Support

IEG4's eChanges service was designed in 2012 and still provides an unrivalled user experience for citizens wishing to report a change in circumstances to their benefit claim. Unparalleled in terms of its functionality, the eChanges solution:

- Authenticates the citizen with the back-office application in real-time based upon their:
  - Name
  - Date of Birth
  - National Insurance Number
  - Post Code
- Retrieves their claim information
- Personalises the questions the citizen is asked about based upon the details held in the back-office system at that specific moment in time



- Pushes the details of the change(s) directly into Northgate (NEC), Capita, Civica systems and all major document management solutions.

In terms of some examples of personalisation, the eChanges form will dynamically:

- not ask a claimant 'Have you had a change in rent' where no housing benefit is present on the claim
- ask "Do you still work for ASDA?" where the employment information in the back-office shows they currently work for ASDA
- list the household members present on the claim where someone is being moved out
- show rent service charges where these are included in the calculation of their rent
- ask if someone is no longer a student where a full-time student is present on the claim
- show the children where a change in childcare costs is being reported

The following are the change types catered for:

- Change of address
- Changes in household
- Changes in income
- Changes in capital
- Changes in pension (paid into and received)
- Changes in childcare costs
- Changes in rent

In essence, the eChanges form only asks questions contextual to the citizen's circumstances which means the form is inherently shorter and error is minimised - because they cannot report a change that doesn't match their circumstances.

Intelligent Change Processing

Benefit rules mean that the effective date of a change is one of the most important values passed to the back-office application. In practice this means dealing with multiple changes. This can be complex for a user as they are required to ensure that the changes are placed in chronological order prior to being processed.

As you wouldn't want to mandate to the citizen that they provide things chronologically rather than by type, the eChanges form handles all of the logic to derive the correct order for changes to be passed to and updated in the back-office. For example, a citizen reports:

- Partner moved in on 21/11/2023
- New earnings from 01/11/2023
- A change in rent from 01/09/2023

The change in circumstances form will extrapolate out what needs to happen and will push XMLs to the back-office as follows:

XML 1	01/09/2023	Change in rent
XML2	01/11/2023	Change in rent & New earnings
XML3	21/11/2023	Change in rent, New earnings & New partner

This intelligence ensures that the back-office benefit periods are updated in the exact same manner they would have been updated were the changes done manually.

Universal Credit

Citizens can report that they, their partner or non-dependent are now in receipt of Universal Credit and, where relevant, the user is presented with a page designed in the exact layout of the UC Award letter. Like the eClaim, this page captures all of the details of the person's UC award. This means that the officer can make a better-informed decision on assessment.

When enabled the following will be present on the online form in the 'Continue a form' section.

Dynamic Evidence

Based upon the circumstances the claimant is reporting a change about, the eChanges form will dynamically tailor the evidence requested to complement the changes. The user is able to provide this information online and the form will ‘track’ what has and has not been provided so that, upon submission, the user is told what they still need to provide if anything is outstanding.

So, if a person was told five items were required and they uploaded evidence for four, upon submission the remaining item would be shown as outstanding. The citizen can then come back and upload these within a month with this information then being passed to the EDMS.

Self-employed Functionality

Self-employed income is notoriously difficult to administer owing to the way benefit is calculated i.e. on weekly income and the very nature of self-employed people - that is they can have highly changeable income. Reflective of this, eChanges has an inbuilt self-employed function, which is able to:

- calculate a person’s earnings based upon many different categories of income in different payment frequencies
- calculate allowable/disallowed expenditure amounts based upon your own council’s settings
- forecast earnings and expenditure for those who have only recently set up a business.
- calculate their income for housing benefit/local council support purposes including
- establishing where the person’s income will be below minimum wage

At the end of this process, the citizen will be taken back to the online form with a copy of the Self-employed form in PDF format to append as evidence.

This is designed to ensure that even the most complex benefit claims can be administered quickly and easily.

Fast Track Functionality

The fast track functionality provided within the eChanges form ensures that citizens are provided with the ability to choose to provide all of their evidence prior to submission in order to have their claim processed quicker.

If a citizen does not choose the fast track method, they will have their application processed in the standard SLA for that council. Where the citizen opts into Fast Track the council is able to let the citizen know how long it will be before it is processed; but this will be significantly quicker than the standard SLA.

The beauty of this service being embedded into a digital service is that the council gets all of the evidence it needs to process the claim on day one and the citizen is ensuring their claim is processed much faster than it otherwise would have.

Enhanced EDMS integration for Fast Track

When citizens submit a change(s) using Fast Track, the service is able to dynamically inform the EDMS application:

1. That the change is fast track or not
2. Separately identify the specific type of evidence as well as indicate whether it is linked to a fast track change or not

Back-office Integration

The eChanges form is capable of integrating to the following back-office applications using national benefit schema (which IEG4 is the custodian of) driven APIs:

- Northgate (NEC)
- Capita
- Civica

EDMS Integration

The eChanges is capable of and has proven integration to the following widely used back-office EDM applications:

- NEC Document Management (previously Information@Work)
- Civica W2/360/Comino
- Civica Workflow
- IDOX
- OpenText
- ICLipse
- IEG4 Workflow

Reporting Functionality

eChanges comes with rich Power BI enabled reports. The reports available are:

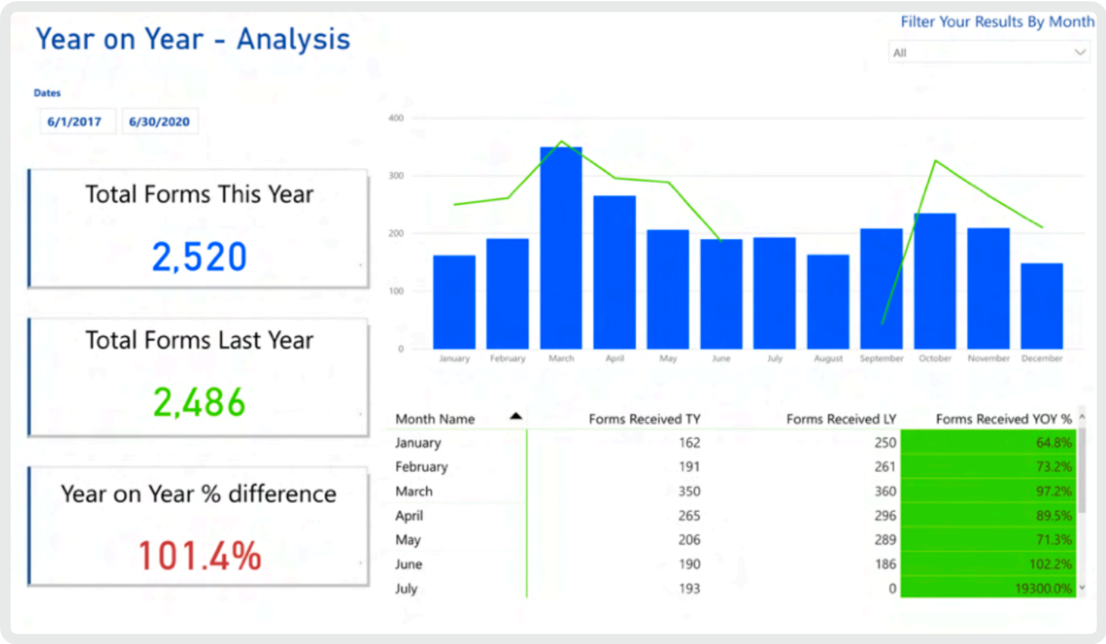
eChanges - Overview

The overview report for eChanges allows Benefit managers to see at a glance:

- Numbers of complete/incomplete forms
- % of successful integration
- Total number of changes reported
- Average number of changes reported per form
- The number and proportion of change types reported
- The channel where the report was made

eChanges - Year-on-Year Analysis

This report allows Benefit managers to see the trend of forms completed both for the current year and versus last year. Each of the months can be clicked upon to filter the data where necessary.



eChanges - General Analysis

This report allows one to see the breakdown of completed forms across a variety of metrics and demographical categories. For example, we can see the overwhelming majority of users were able to authenticate, report their changes and submit it in less than one hour.

eChanges - Geographical Analysis

This report allows managers to be able to understand which Council Wards are reporting the most changes and to be able to also understand black spots for changes being reported. All of the data can be filtered and exported into Microsoft Excel.

eChanges - Incomplete Forms Analysis

This report allows managers to see which pages users are abandoning the form on. We can see the bulk of users only view the guidance notes page.

HBAA – Full Case Review

In August 2020, the DWP issued Housing Benefit Circular A9 2020, which is a special ‘bulletin’ to councils notifying them of a change to policy or process. This specific circular sets out the details of a Housing Benefit Award Accuracy (HBAA) Initiative and the funding LAs will receive to undertake activities to identify unreported changes of circumstances. The funding, from the DWP, is designed to support LAs undertaking specific activities to proactively identify unreported changes and make sure that the right amount of benefit is paid to the right person at the right time. This funding is awarded for councils carrying out Full Case Reviews (FCR).

A FCR requires a council to consider and look at all the current claim details and evidence associated with the claim, as well as any other fresher information or evidence they can source, in order for the weekly HB amount to be reviewed. The key elements are that:

- the Council reviews and validates whether the current information associated with the claim remains correct
- the Council seeks evidence from the claimant where it is possible to do so, in accordance with their review processes

All of this in order to identify any changes of circumstances and recalculate a claimant’s HB award accordingly. In line with this, IEG4 has built a new form that leverages multiple elements from eChanges, which enables a citizen to:

- review all of the detail currently held on their claim about them
- proactively identify areas that have AND have NOT changed

Intelligent Change Processing

Details of any changes reported in the Full Case Review will be passed in real-time to your back-office benefit processing system.

Benefit rules mean that the effective date of a change is one of the most important values passed to the back-office application. In practice this means dealing with multiple changes. This can be complex for a user as they are required to ensure that the changes are placed in chronological order prior to being processed.

As you wouldn’t want to mandate to the citizen that they provide things chronologically rather than by type, the eChanges form handles all of the logic to derive the correct order for changes to be passed to and updated in the back-office. For example, a citizen reports:

- Partner moved in on 21/11/2017
- New earnings from 01/11/2017
- A change in rent from 01/09/2017

The change in circumstances form will extrapolate out what needs to happen and will push XMLs to the back-office as follows:

XML 1	01/09/2023	Change in rent
XML2	01/11/2023	Change in rent & New earnings
XML3	21/11/2023	Change in rent, New earnings & New partner

This intelligence ensures that the back-office benefit periods are updated in the exact same manner they would have been updated were the changes done manually.

Universal Credit

Citizens can report that they, their partner or non-dependent are now in receipt of Universal Credit and, where relevant, the user is presented with a page designed in the exact layout of the UC Award letter. Like the eClaim, this page captures all of the details of the person's UC award. This means that the officer can make a better-informed decision on assessment.

When enabled the following will be present on the online form in the 'Continue a form' section.

Review your claim

The HBAA - Full Case Review form comes with the ability for benefit claimants to review their current circumstances and then indicate what:

- has changed
- has not changed

Dynamic Evidence

Based upon the circumstances the claimant is reporting a change about, the eChanges form will dynamically tailor the evidence requested to complement the changes. The user is able to provide this information online and the form will 'track' what has and has not been provided so that, upon submission, the user is told what they still need to provide if anything is outstanding.

So, if a person was told five items were required and they uploaded evidence for four, upon submission the remaining item would be shown as outstanding. The citizen can then come back and upload these within a month with this information then being passed to the EDMS.

Back-office Integration

The HBAA form is capable of integrating to the following back-office applications using national benefit schema (which IEG4 is the custodian of) driven APIs:

- Northgate (NEC)
- Capita
- Civica

The integration we have is:

- Bi-directional (we pull and push data from and to the back-office application)
- Secure (we provide you with a Azure Service Bus, which sits on your council network and provides a secure outbound connection to council's own Microsoft Azure instance)

For HBAA, we search the back office to see if there is an existing claim already held and as long as it is live, we also retrieve all of the details of the claim to provide a personalised form to complete. As finding an existing claim is a prerequisite to proceeding to completion in the HBAA form the data sent is always linked to the appropriate claim upon submission.

Plus, the form's PDF and any associated evidence will also be indexed with the existing claim reference authenticated against.

EDMS Integration

The eChanges form is capable of and has proven integration to the following widely used back-office EDM applications:

- NEC Document Management (previously Information@Work)
- Civica W2/360/Comino
- Civica Workflow
- IDOX
- OpenText
- ICLipse
- IEG4 Workflow

Additional Benefits Forms

These online forms are provided as a part of being licensed for Digital Benefits:

- Landlord/ Letting agent/ managing agent form
- Change bank details for payments
- Overpayments - Make a payment arrangement
- Backdated Benefit Application
- Benefits - Two Homes Payments
- Benefits - Send us evidence
- Benefits - Appeal
- Benefits - Direct payment to landlord
- Benefits - Apply for HB or CTB where one already in payment

Council Tax forms

With online forms for Council Tax comprising a huge proportion of the work councils receive, IEG4's Council Tax forms have been designed with ease of completion, intuitiveness and automation in mind.

Revenues Process Orchestration (RPO)* is the engine that powers the integration with back-office applications and the functionality it provides ensures the councils using these services are consistently achieving 90% to 100% automation levels without any human involvement.

*RPO and thus integration to the back-office is currently only available for Northgate and Capita back-office Council Tax applications.

Direct Debit

The Council Tax Direct Debit service is designed to capture information to enable the creation of a new Direct Debit based instalment plan on a council tax account.

General Functionality

The form has the following high-level key functions:

- Capture of the citizen's
  - name, address, contact details, and
  - council tax account no.
- Capture the citizen's bank details
  - Including a real-time bank validation check
- Capture the frequency/payment day they'd like
- Generate a digital direct debit mandate pre-filled with the content provided
- Submit the data into the back-office
- Submit a copy of the form PDF into the document management/workflow application

Localisation

The form has settings which enable the council to:

- Add in the different payment frequencies the council supports and the payment days available within those. For example, a council might support monthly (1st, 10th, 25th), weekly (Monday, Friday), Annually (1st of April).
- Enter the format in which council tax numbers need to be entered in
- Add the Direct Debit Service User Number for the purposes of the mandate
- Add the Council Tax address for the council for the purposes of the mandate

Real-time checks

The power of the IEG4 solution and reason for the high automation levels its customers achieve are in the real-time checks that are built in. These are designed to prevent exceptions and forms being submitted in circumstances where you would not want this to happen.

Prior to submission the Direct Debit form will:

1. check if the council tax account number entered and the surname/organisation name of the account holder match
2. retrieve the current recovery stage for the financial year and:
    a. compare it with a set of recovery stages where direct debits are not permitted
    b. for each recovery stage where it is not permitted it will show a custom, user-defined message/ call to action. E.g. if the account is with an enforcement agent, it could provide their details and how to get in touch with them.
3. check whether the citizen has a history of not paying direct debits once they've been set up
4. and where this happens a custom, user-defined message/call to action is presented that informs the citizen of what to do next
5. check for a marker added during this financial year that indicates a citizen has made an arrangement and can bypass checks 3 and 4
6. check in real-time, using the industry-leading online bank verification service from Loqate (GBG Group) that the bank account details are valid prior to form submission. If they are invalid, the citizen is told to check and try again. If they are valid, the details of their bank are retrieved and automatically populated into the Direct Debit Mandate page.

Council Tax System Automation

Once a form is submitted, it kicks off a dedicated workflow. In terms of back-office updates*, the Direct Debit form:

1. Sets up the actual Direct Debit Payment Method and Instalment Plan
2. Adds any contact details for email/phone number to the party completing the form
3. Adds a notepad entry to explain the updates made E.g.

"Council tax account 12345034 has liable party with surname McMahon Account is active

No notes found to indicate bounced Direct Debits on account 20000527654 for current financial year

Direct debit setup on account 12345034

Contact details updated for person reference 983474"

* The number of steps involved in the automation is dictated by the APIs available in the back-office application. E.g. Northgate has more APIs than Capita, and the ability to transfer a credit from one account to another is not possible with the Capita One (Academy) Council Tax application.

Document Management Automation

Where an alternative document management system is to be updated, the online form is capable of:

a) Saving the PDF to a file location
b) Automatically indexing the form document into the document management system based upon the account number and whether the process is fully automated or not.

We can provide integration to the following widely used back-office EDM applications:

- NEC Document Management (previously Information@Work)
- Civica W2/360/Comino
- Civica Workflow
- IDOX
- OpenText
- ICLipse
- IEG4 Workflow

IEG4 Workflow - User-facing Functionality

Within Workflow a user can see:

- The stages of the process and actions that took place
- User-friendly descriptions against each stage
- The outcome for every API update
- The request and response to every API call
- The form PDF

Single Person Discount

Enabling citizens to apply for, or end their, Single Person Discount online ensures that you can meet the digital demands of those applying and maximise the likelihood of getting the information from citizens wanting to tell you about someone moving in.

Single Person Discounts can involve ending council tax accounts, transferring people, credits, and even changes in circumstances where Benefits are involved.

The purpose of the form is to enable citizens to provide details of who they are, where they live, their council tax account information and primarily to apply for or cancel a single person discount.

General Functionality

The form supports one cancellation reason and three reasons for SPD applications, which are:

- Someone has moved out
- Someone has passed away
- I should have been getting the discount already

The form also caters for:

The set-up of a Direct Debit where a new account is going to be created because someone has moved out
An automated benefit change in circumstances where a person has moved in as a result of an SPD

Localisation

The form has settings which enable the council to:

- Enter the format in which council tax numbers need to be submitted
- Set the maximum backdated period of time that an SPD should be allowed to be automated
- Set a period of time for which a person has to provide a reason for the delay in them applying i.e. if they want it back to 2018 if applying in 2020.

Real-time checks

The power of the IEG4 solution and reason for the high automation levels its customers achieve are in the real-time checks that are built in. These are designed to prevent exceptions and forms being submitted in circumstances where you would not want this to happen.

Prior to submission the Single Person Discount form will:

1. check if the council tax account number entered and the surname of the account holder match
2. retrieve the user's address if they successfully authenticate in step 1.
3. retrieve the current liable parties/named occupants to enable a user to indicate who has moved out where they are applying for a discount.
4. checks the number of resulting occupants is 1 when they are applying for a discount and
5. prevents submission if not
6. enables the user to add additional named occupants that were not present against the account i.e. cater for incomplete back-office data sets.
7. check in real-time, using the industry leading online bank verification service from Loqate (GBG Group) that the bank account details are valid prior to form submission where they want to pay by Direct Debit on the new account.

Council Tax (& Benefits) System Automation

Once a form is submitted it kicks off a dedicated workflow. In terms of back-office updates* the SPD form can, depending upon the circumstance:

i. Terminate a current account
ii. Transfer a person from an old account to a new account with the discount
iii. Create a new person or people where someone/some people has/have moved in
iv. Carry out a benefit change in circumstances where someone has moved out
v. Calculate the bill
vi. Transfer any credit due from one account to another
vii. Sets up a Direct Debit Payment Method and Instalment Plan if a new account created
viii. Adds any contact details for email/phone number to the party completing the form
ix. Adds a notepad entry to each account affected to explain the updates made E.g.

"Council tax account 20000868320 has liable party with surname McMahon
Account 20000868320 terminated on 2020-03-31 and new account 2000119406 created
Person 654321 added as a liable party to account 2000119406 from 2020-04-01
Person 'Claire McMahon' added as a new person. Reference: 987654
Person 987654 added as a liable party to account 2000119406 from 2020-04-01

No balance to transfer from 20000868320 Direct debit setup on account 2000119406"

x. Optionally the account can be suspended for a set period of time prior to billing to allow for QA

The number of steps involved in the automation is dictated by the APIs available in the back-office application. E.g. Northgate has more APIs than Capita, and the ability to transfer a credit from one account to another is not possible with the Capita One (Academy) Council Tax application.

Document Management Automation

Where an alternative document management system is to be updated, the online form is capable of:

- Saving the PDF to a file location
- Automatically indexing the form document into the document management system based upon the account number and whether the process is fully automated or not.

We can provide integration to the following widely used back-office EDM applications:

- NEC Document Management (previously Information@Work)
- Civica W2/360/Comino
- Civica Workflow
- IDOX
- OpenText
- ICLipse
- IEG4 Workflow

IEG4 Workflow - User-facing Functionality

Within Workflow a user can see:

- The stages of the process and actions that took place
- User-friendly descriptions against each stage
- The outcome for every API update
- The request and response to every API call
- The form PDF

Discounts, DBR & Exemptions

Owing to the large number of Discounts, Exemptions and the different questions/supporting evidence needed, councils typically have many separate forms. However, digital should be about more than simply replicating paper, it should be an opportunity to provide something better. i.e. A solution that asks a citizen about their circumstances and, from that, guides them to the appropriate Discount/Exemption and the information they need to provide.

This service enables citizens to provide details of who they are, the property in question and the means to apply for a reduction based on the person's status, disability, or property. Supporting 27 different Discount/Exemption scenarios and Disabled Band Relief, it is a one-stop digital shop for citizens seeking reductions.

General Functionality

The form supports these four high level areas:

- Someone is disregarded
- My property is empty
- My property has been adapted for someone
- The property is an exempt type

For disregarded people, the following person statuses are supported:

1. Severely Mentally Impaired
2. Carer
3. School/College Leaver
4. Child Benefit Recipient
5. Apprentice
6. Full-time Students
7. A student's foreign spouse/dependent
8. Religious Community Member
9. Detention/Prisoners
10. Hospital/Residential Care
11. Diplomats

The following empty property statuses are supported:

1. Awaiting sale
2. Awaiting let to tenants
3. Awaiting occupation
4. It's uninhabitable due to structural works
5. It's empty following the occupant passing away
6. It's been left empty by someone now in care
7. It's been left empty by someone now in prison
8. It's been left empty by full time students
9. It's been left empty because of a repossession
10. It's been left empty by a bankrupt person
11. It's been left empty awaiting a minister of religion
12. It's been left empty as occupation is not permitted by law

The form will capture details of whether the following have been adapted for disabled band reduction purposes:

1. A room (other than a kitchen, bathroom or lavatory) which is mainly used by, and required for meeting the needs of a disabled person/people
2. A second bathroom or kitchen which is required for meeting the needs of a disabled person/people
3. A space for a wheelchair used within the property by a disabled person/people

The following exempt property types are supported:

1. Unoccupied property owned by a charity
2. Student Halls of residence
3. UK Armed Forces Accommodation
4. Visiting Forces Accommodation

The form also supports the ability for citizens to upload evidence to provide the status of household occupants or their property.

Real-time checks

The power of the IEG4 solution and reason for the high automation levels its customers achieve are in the real-time checks that are built in. These are designed to prevent exceptions and forms being submitted in circumstances where you would not want this to happen.

Prior to submission the discounts/exemptions form will:

1. check if the council tax account number entered and the surname of the account holder match
2. retrieve the user's address if they successfully authenticate in step 1
3. retrieve the existing liable parties / occupant's party references

Council Tax System Automation

Once a form is submitted it kicks off a dedicated workflow. In terms of back-office updates* the Discounts, DBR and Exemptions form can, depending upon the
circumstance:

1. Terminate a current account
2. Transfer a person or people from an old account to a new account
3. Create a new person where a new person previously not known is now resident
4. Create a new occupancy period
5. Add a new occupant and make them liable or set them as disregarded
6. Set an empty and unfurnished discount for a date range when moving out of a property
7. Set an empty and unfurnished discount for a date range when moving into a property
8. Set an empty and furnished discount for a date range when moving out of a property
9. Set an empty and furnished discount for a date range when moving into a property
10. Work out periods where a disregard discount is applicable and automate the addition of this for multiple people where appropriate
11. Work out periods where an exemption based upon person status is applicable and automate the addition of this
12. Automate the award of Disabled Band Reduction
13. Work out periods where an exemption based upon property status is applicable and automate the addition of this
14. Transfer any credit due from one account to another
15. Sets up a Direct Debit Payment Method and Instalment Plan if a new account created
16. Adds any contact details for email/phone number to the party completing the form
17. Adds the forwarding address for parties no longer resident
18. Adds a notepad entry to each account affected to explain the updates made e.g.

"Person John Smith added. Reference 950315
Occupancy period setup on account 612347432685 from 2019-07-15 for party refs 950315 Student discount added for Person Reference 950223 from 2019-07-13 to 2020-10-20 Student discount added for Person Reference 950224 from 2019-07-20 to 2021-05-20 Student discount added for Person Reference 950315 from 2019-07-25 to 2021-02-04 Exempt property discount added from 2019-07-25"

Optionally the account can be suspended for a set period of time prior to billing to allow for QA

*The number of steps involved in the automation is dictated by the APIs available in the back-office application. E.g. Northgate has more APIs than Capita, and the ability to transfer a credit from one account to another is not possible with the Capita One (Academy) Council Tax application.

Document Management Automation

Where an alternative document management system is to be updated, the online form is capable of:

a) Saving the PDF to a file location
b) Saving any uploaded evidence to a file location
c) Automatically indexing the form document into the document management system based upon the account number and whether the process is fully automated or not
d) Automatically indexing the evidence uploaded into the document management system based upon the account number and whether the process is fully automated or not

We can provide integration to the following widely used back-office EDM applications:

- NEC Document Management (previously Information@Work)
- Civica W2/360/Comino
- Civica Workflow
- IDOX
- OpenText
- ICLipse
- IEG4 Workflow

Workflow - User-facing Functionality

Within Workflow a user can see:

- The stages of the process and actions that took place
- User-friendly descriptions against each stage
- The outcome for every API update
- The request and response to every API call
- The form PDF
- Evidence uploaded with the form

Additional Council Tax Forms

- Change of Address
- Special Payment Arrangements
- Open Banking for SPARS
- Standard Financial Statement (SFS)
- Request a Refund
- LCTS as a Discount
- Notification of moving to receive care
- Change of circumstances
- Single Person Discount Review
- Bailiff and Enforcement Agent Missing Payment Enquiry
- Bailiff or Enforcement Payment Arrangement
- Comments, suggestions and enquiries form
- Empty and Unfurnished Discount
- Report a Missing Payment
- Summons or Bailiff Enquiry
- Council Tax and Business Rates Bailiff Enquiries
- Landlord or Agents - Notification of Change of Occupancy
- Evidence Upload
- Business Rates - Comments, suggestions and enquiries
- Business Rates - Evidence Upload
- Business Rates - Payment Arrangement
- Business Rates - Summons Payment Arrangement
- Business Rates - Public House Relief

Business Rates Forms

- Moves, Reliefs and Pay
- Business Rates Direct Debit
- Rates Relief

Workflow

Workflow tool

IEG4's workflow product comes as part of subscription of the forms service. It is possible to create a task/case for a back-office user to complete from any form (without any code).

Unlike legacy EDMS/Workflow systems which involve the use of saving things to disk/indexing CSV files, with our workflow tool you can link a form to a process simply by selecting the appropriate process you want to link it to via a drop-down.

Workflow Functionality

First and foremost, the workflow tool is an application that enables tasks to be generated, allocated, and managed by council staff or third parties. It has the added benefit of being able to surface these to be tracked by customers online if the council wishes. Work can be automatically allocated to members of staff and/or third parties into their individual work queue called 'My Tasks':

Work can be allocated:

- To a specific user
- Round Robin across a team of users
- To an organisation (e.g. external contractors/organisations delivering services for the council)
- To a person previously assigned

A user who is assigned tasks can see:

- the name of the process, the current stage and its category
- the form reference, where it was created by an online form
- when the process started, when it was last updated by a council member of staff or a customer
- customers can add notes/documents through their customer account
- when the target date for the step they're working on is to be completed by

Users can search within, filter and sort the list of work items by:

- Form reference
- Process type/process category/step type
- Step start/target date
- Last activity date

For each task (process) created it is possible for it:

- to have multiple stages, and for each of the stages:
- to be allocated to the same or different users
- to have its own target time to complete (SLA) using all days or working days only
- to trigger actions when a step is started or completed as outlined below

Actions

Council officers are able to set it up so that, upon a process step starting/finishing, an email is sent to any or all of these:

- To the customer tracking the process
- To the officer working on the case or their manager etc
- To a fixed email address

There is the ability to set the ‘From Address’, ‘Subject’, ‘Email body’ of the email. This ensures that as officers complete process steps, automated proactive emails are sent to the citizen.

Plus, where it is the citizen tracking the progress of the process, the notifications can be sent via their notification preference i.e. Email, SMS, WhatsApp, Facebook Messenger.

My Tasks

When working on a task, an officer is able to:

- View any fields of info added when the process was created
- View/add notes e.g. to request more information/documentation from a customer
- View/add documents
- See linked processes to the customer in question
- View/add a category
- View/link accounts to the process

When adding notes / documents, it is possible to make them visible/private from the customer/user that made the request in their online account. Where a note/document is added, and it is visible, the customer will automatically be sent a notification to let them know there is an update to their request.

Supervise Tasks

It is possible, depending upon permissions and groups of users, for users with appropriate privileges to view all work assigned to a team, group of teams, or even the whole council. It is also possible for such users to re-allocate work where appropriate.

Search Processes

Where My Tasks/Supervise Tasks relate to outstanding work, Search Processes provides a central way to search and view processes that are both in progress and/or complete.

Workflow Flex

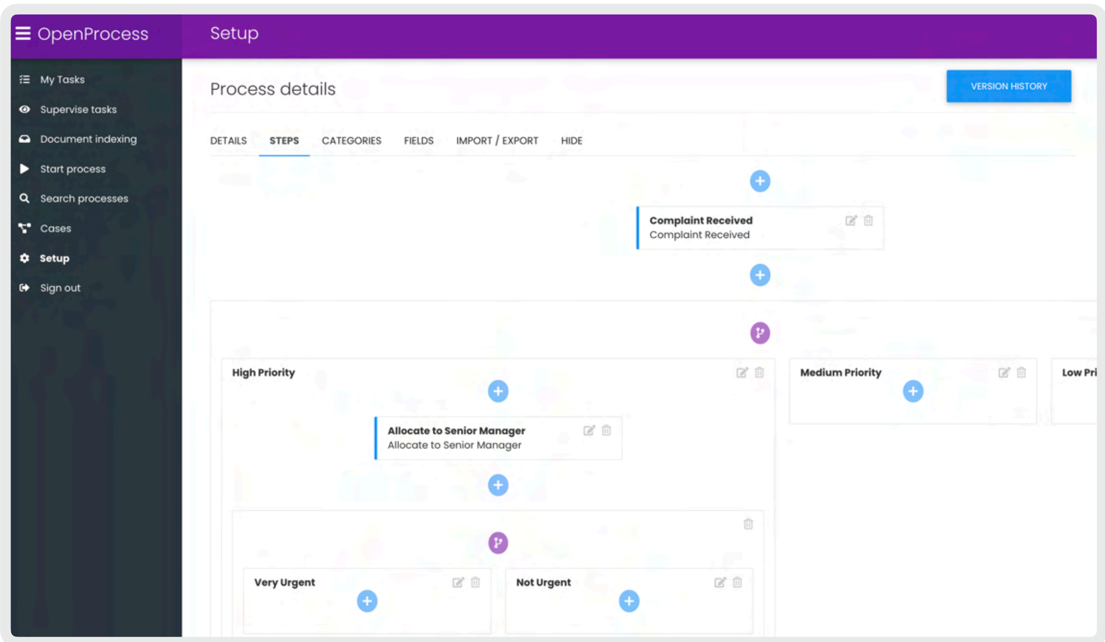
To expand upon the powerful functionality in our workflow tool, this feature means that processes can become vastly more dynamic and intelligent.

The following lists the additional capabilities:

- A new step type within a process called a ‘Branch Step’
- Multiple conditional branches can be added to a branch step within a process, including nested branch step types
- The ability to set conditions with a branch based upon:
    - text-based or
    - boolean expressions
- The ability to drive a branch in a process using:
    - data provided by an online form
    - data added by a user manually
- The ability to set one or more keys pieces of data as being mandatory in order for a step to complete - thus preventing its completion without this data being populated.
- The ability to edit/delete conditional branches from a branch step with version control built in
- Elegant error handling so that if:
    - a process reaches a branch step where none of the conditions set up are true the preceding step will not complete and an error will be raised

OR

- An additional allocation strategy for ‘The user from the preceding step’ to ensure automated user allocation irrespective of the number of process branches/users/teams allocated
- The ability to use any data items (captured within a form that triggered the process or any data items added after the process was started) as template fields within notifications.
- The ability to invoke different REST APIs based upon conditions with the process where the REST API feature is licensed



Branching

To provide some idea as to the power of this, let's look at a scenario where a user submits an online form. Data from that online form automatically sets the second stage of the process to go down the person-based exemption branch. This could:

- Automatically allocate the work to the user/team appropriate for that type of work
- Automatically send a notification to the customer informing them of how their form is 'progressing' with custom messaging based upon it going down this branch of the process
- Automatically call an API using data from the online form to update a back-office

All the above can take place on any of the distinct stages within the process.

South Cambridgeshire District Council was able to create a Complaints Management function, rather than buying a separate system, because of the capabilities of our Workflow Flex tool.

Worfklow - Data Export

With this feature it is possible to extract the underlying data for each process from the following three areas:

- My Tasks (outstanding work for a specific user)
- Supervise Tasks (outstanding work for a specific team or teams)
- Search Processes (outstanding and completed work for a specific team or teams)

The data that is exported for these is:

Data Export Items
Process name
Current Step
Account (that the process is associated with)
Category
Reference (I.e. Form Reference)
Started On (Current step start date - Date and Time format)
Last Activity (Current step last modified - Date and Time format)
Target Date (Current step target date - Date and Time format)
Allocated to (the current user assigned it)
Process Start Date (Overall process start date - Date and Time format)
Process Completed On (Date and Time format)
Process Completed By (the user that completed the process)
Key fields (This will map all of the key information associated with the process)
Notes (This will map all of the notepad entries for the process)

Customisation

IEG4's solution has been designed to give local authorities both flexibility and control in managing their online forms. All of our prebuilt forms include the ability for councils to customise key elements quickly and without the need for specialist IT resource. This includes the ability to amend:

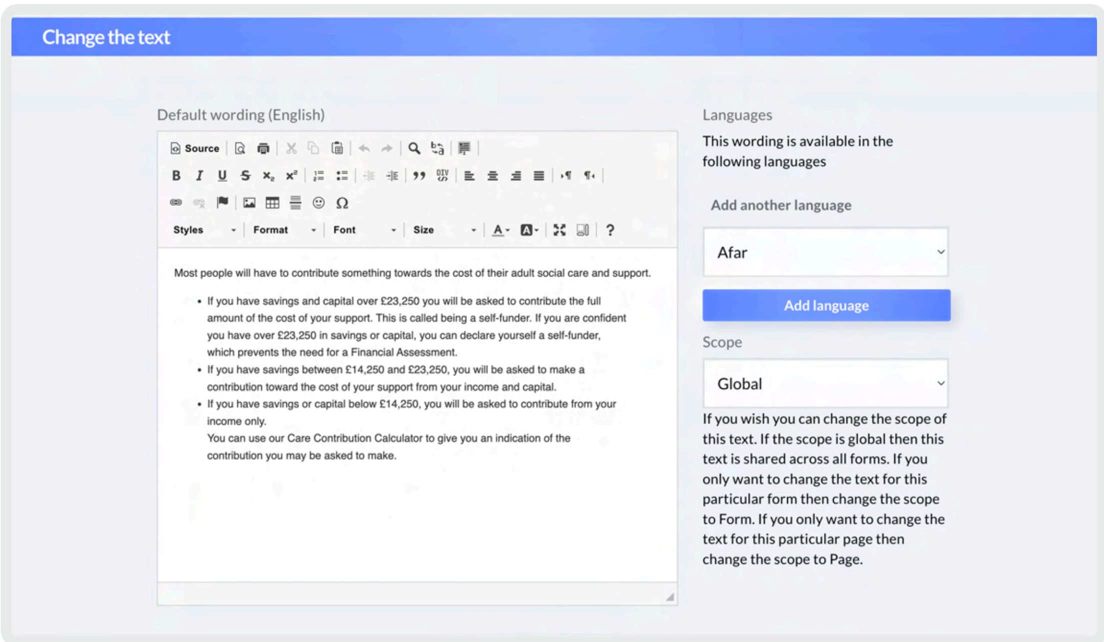
- Guidance notes to ensure clarity for citizens.
- Question wording and associated help text to align with local policy or tone of voice.
- Declaration and privacy statements to remain fully compliant with council-specific legal requirements.
- Explanatory text displayed when a user saves or submits a form, ensuring clear instructions at every stage.

These self-service configuration options enable councils to keep their forms accurate, relevant, and aligned to local requirements while reducing reliance on technical teams.

In addition, IEG4 provides full support for creating bespoke application forms. This is achieved in two ways:

1. **Bespoke form-building services** - our expert team can design, build, and integrate fully tailored forms that meet unique council requirements.
2. **Low-code forms solution** – enabling councils to rapidly create and deploy their own forms, giving them full autonomy to respond to changing service needs at speed.

This combined approach ensures that councils benefit from a library of proven, prebuilt forms while retaining the ability to tailor and expand their digital services to meet evolving demands.



User / administrator accounts and permissions

Access Controls and Permissions
Access to both the Forms Portal and Workflow Tool is managed through a configurable permissions framework. User roles can be tailored to provide different levels of access (e.g., full administrator, view-only) and can be restricted further to specific forms or processes within the platform.

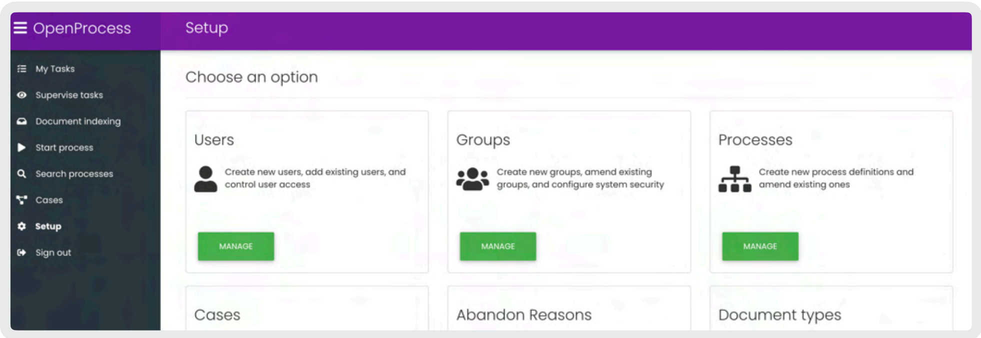
Security and Authentication
To strengthen security, multifactor authentication can be enabled. This is supported through commonly used authenticators such as:

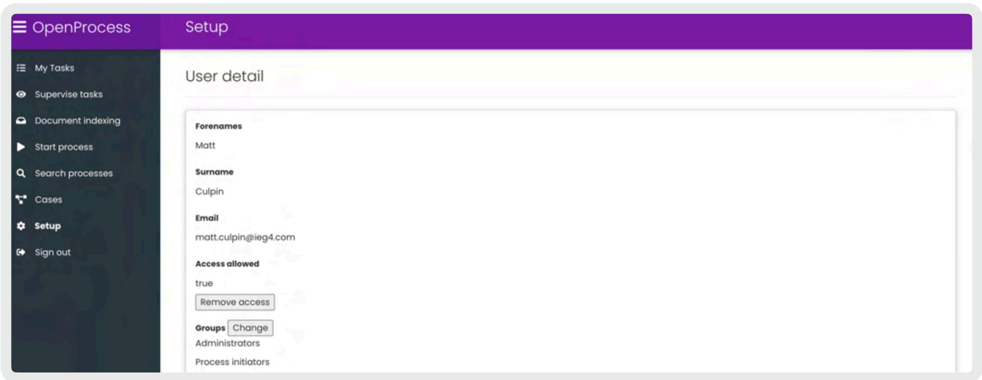
- Microsoft Authenticator
- Google Authenticator

User Management
All user, group, and permission settings are managed through a single, intuitive “Set Up” screen. Administrators can add users, assign them to groups, and configure permissions quickly and effectively.

Audit Trail
Comprehensive user audit data is captured and made available through the reporting database, enabling detailed analysis of user actions for compliance, monitoring, and security purposes.

Scalability Across Departments
The Workflow Tool is designed for use across all departments, ensuring consistent configuration and governance.





Form process flows and integrations

Direct Debit

Name, address and Completed by details collected

↓

CT account number collected, collects bank account information, using **Loqate** to verify the account details

Can only proceed if account matched and bank details are verified

↓

Payment frequency and instalments are calculated using data from a lookup file and are individual to the Authority

↓

Submit form

NEC

Checks for recovery notice restrictions, previous bounced DDs, outstanding Recovery and stops the process if any of the above apply, this failure is reported back to the authority. The DD is then set up or updated if there is already one in existence, if all of the checks are passed, the contact details are updated and a notepad entry is created.

mri REAL ESTATE SOFTWARE

Checks for recovery notice restrictions, previous bounced DDs, outstanding Recovery and stops the process if any of the above apply, this failure is reported back to the authority. If all of the checks are passed, the DD is set up and a notepad entry is created.

CIVICA

Creates the DD on the account where possible. The exceptions are handled in Civica

Single Person Discount

Name, Council Tax Account and Completed by details collected

Can only proceed if the account has been matched

Check if customer applying for or ending discount

Apply for discount

Reason for application

- Should have been getting discount all along
- Someone has moved out
- Someone has passed away

Option to pay by DD.

Info collected per DD form

On clicking '**Next**' validation check for number of occupants.

Cannot proceed if they don't match

End discount

How many people have moved in & what are their details (Name, DOB, date moved in, relationship & prev address)

Option to pay by DD.

Info collected per DD form

Submit form

NEC

Checks the Account number is corrects, terminates where necessary, new Liable parties added if needed, contact details (email & phone number) updated/added. Where appropriate, balances are transferred, notepad entries are made and the accounts suspended for manual checking. (at the LAs discretion)

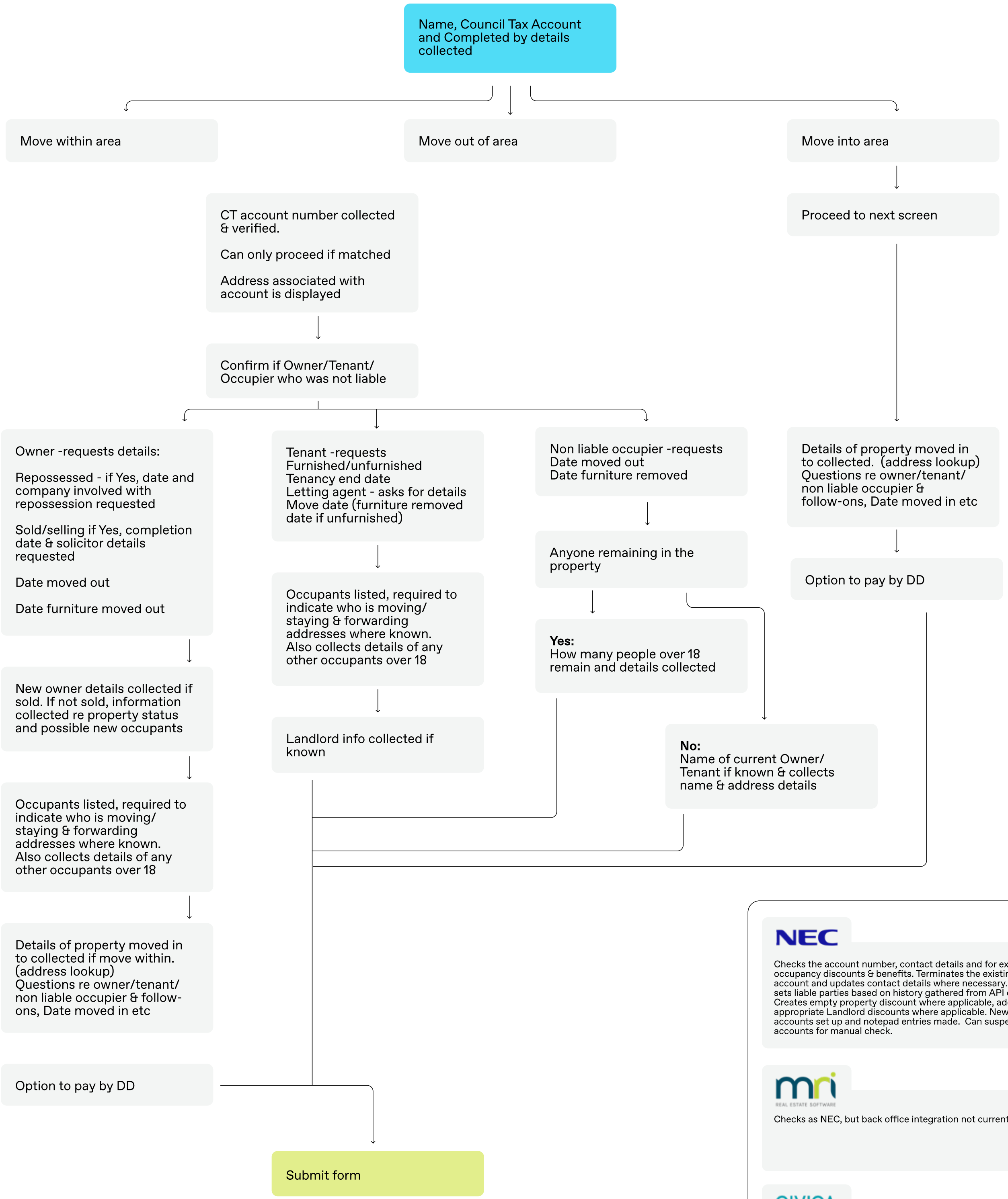
mri

Not currently being used, but does the same as NEC

CIVICA

creates the DD on the account where possible. The exceptions are handled in Civica

Change of address



NEC

Checks the account number, contact details and for existing occupancy discounts & benefits. Terminates the existing account and updates contact details where necessary. Finds & sets liable parties based on history gathered from API calls. Creates empty property discount where applicable, adds appropriate Landlord discounts where applicable. New accounts set up and notepad entries made. Can suspend accounts for manual check.

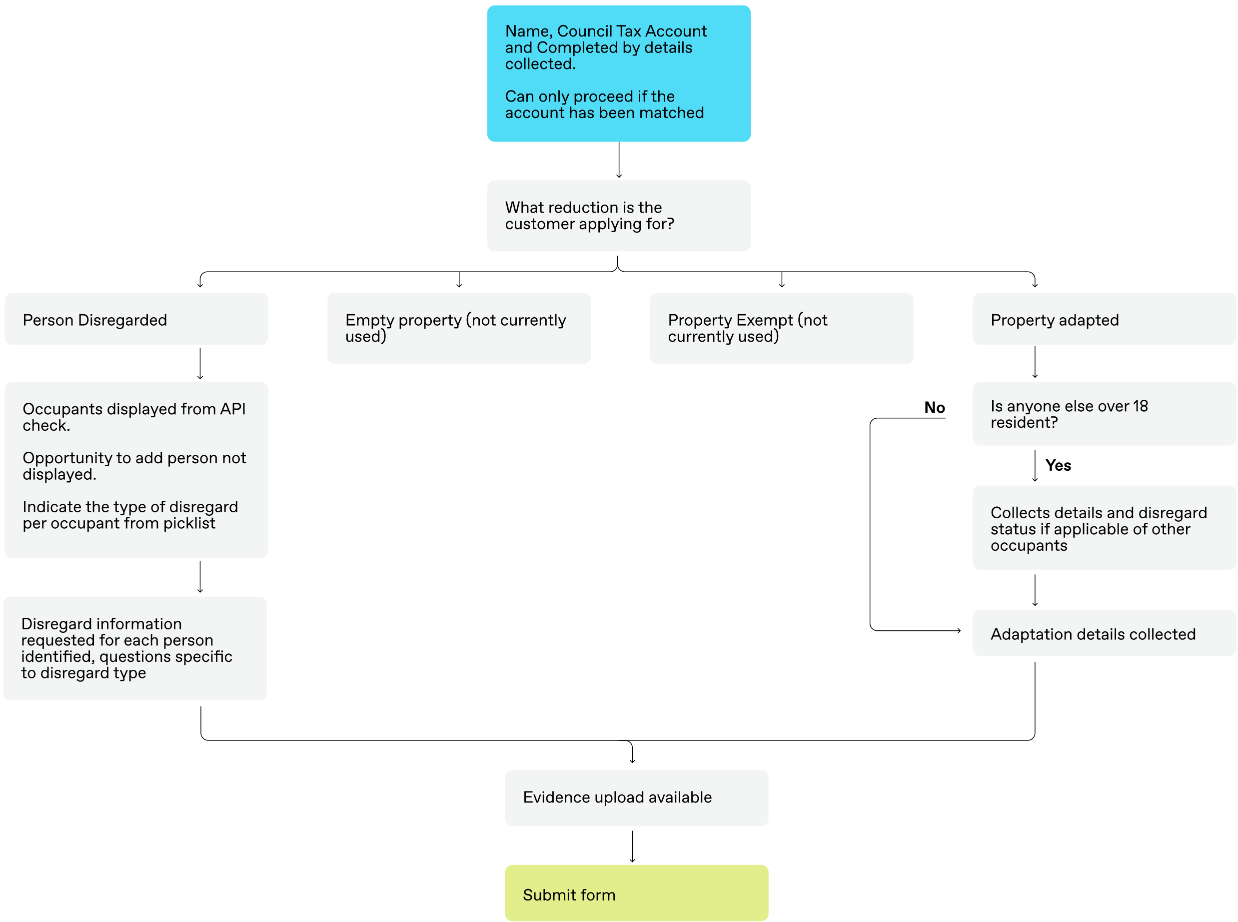
mri REAL ESTATE SOFTWARE

Checks as NEC, but back office integration not currently live

CIVICA

Performs occupancy check and pushes change details to back office.

Discounts & Exemptions



NEC

Checks the account number, contact details and for existing occupancy discounts & benefits. Terminates the existing account and updates contact details where necessary. Finds & sets liable parties based on history gathered from API calls. Creates empty property discount where applicable, adds appropriate Landlord discounts where applicable. New accounts set up and notepad entries made. Can suspend accounts for manual check.

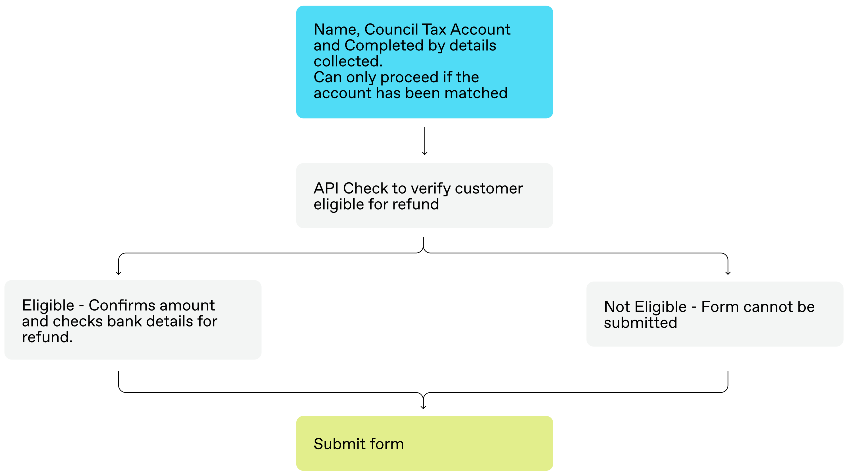
mri REAL ESTATE SOFTWARE

No Live Sites

CIVICA

Performs occupancy check and pushes change details to back office.

Refund Request



NEC

Checks the account number, bank details & sets up refund request. Notepad entry done. Refund request then manually authorised in Back Office

Special Arrangement

Name, Council Tax Account and Completed by details collected.
Can only proceed if the account has been matched

↓

Employment/Income details collected

↓

List of Debts at appropriate recovery stage listed.
Customer selects the debt(s) they wish to make arrangement for.
Payment information collected (cash, DD etc)
Repayment schedule calculated and displayed.

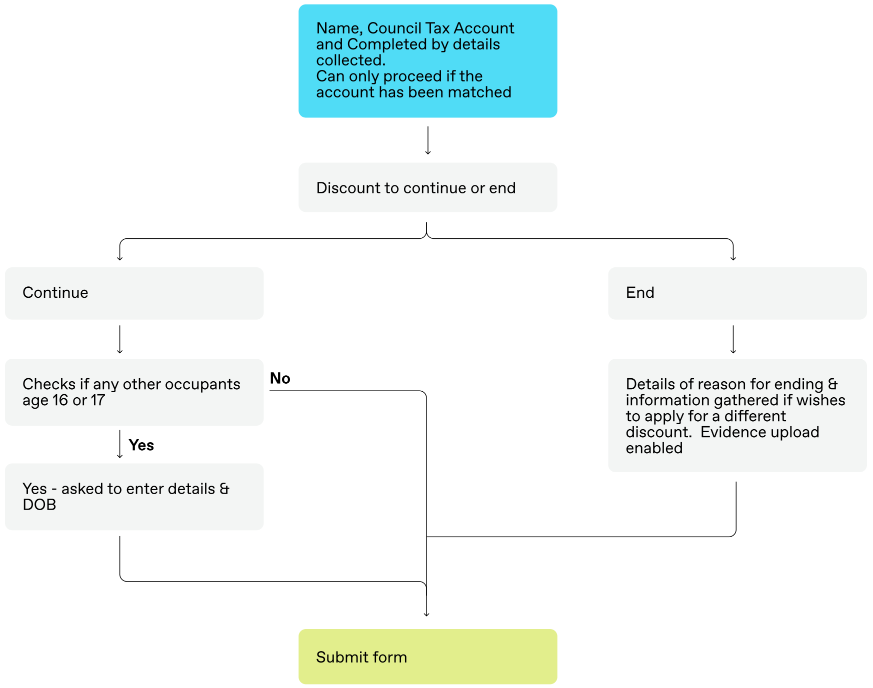
↓

Submit form

NEC

Checks the account number, bank details & sets up refund request. Notepad entry done. Refund request then manually authorised in Back Office

Single Person Discount Review



NEC

Either updates the discount review date or ends the discount. Notepad entry to confirm.

Housing Benefit Calculator

Name & Address not collected as not necessary to do a calculation.

↓

Marital status, DOB & pass-ported benefit information collected.
Disability Status checked.
Living situation (homeowner/rented etc)
Calculation type - HB & CTS, just HB or Just CTS

↓

From next page, questions are dynamic, depending on the answers given on the circumstance page

↓

Final page allows user to start a claim based on the answers given, or start another calculation, either with the answers previously given, or a blank canvass.

If the user decides to claim, the answers previously given are pre-populated into the claim form.

Housing Benefit New Claim

Name, DOB, Address, NINO
Contact info collected.

↓

Passported benefit information collected.
Special circumstances Info and
Disability Status checked.
Living situation (homeowner/rented etc)
Partner information collected (If applicable)
Form Completed by information gathered.
Other Adults in home checked
Dependent child information obtained.

↓

Further questions in line with std HB Claim form collected.
Questions are dynamic, depending on answers already given.

↓

Special Circumstances questions around disability

↓

Benefits section, asks for amount & frequency of each item.

↓

Employed/Self Employed income captured

↓

Capital information collected

↓

Details of Outgoings collected

↓

Rent and landlord information collected if indicated on the form

↓

Permission to discuss with other agencies requested and 'Other Information' can be added.
Can request backdating

↓

Evidence Page
This is dynamic and asks for specific evidence items relating to the information put on the form, the evidence can be uploaded and submitted with the form or later

↓

Ethnicity information page. (Optional)

↓

Submit form

NEC mri REAL ESTATE SOFTWARE CIVICA

Once Submitted

- We search the back office to see if there is an existing claim already held i.e. a cancelled/expired one to prevent duplication.
  If one is found the claim reference is appended to the new claim data sent to the back office, which links the two things together.
- A pdf of the claim form and associated evidence is sent to the EDMS system and indexed accordingly

Housing Benefit Change in Circumstances

Name, DOB, Address, NINO and contact info collected. Completed by details collected.

Can only proceed if the Surname, DOB & NINO & postcode match back office in a real-time check as a minimum

↓

Depending on the information in back office, the customer is asked if they have any changes in the following items:
Change of address
Changes in household (Will list the HH members present on the claim)
Changes in income (Will list employer information where applicable)
Changes in capital
Changes in pension (paid into and received)
Changes in childcare costs (If applicable, the children for which the charges apply are shown)
Changes in rent (If the current claim is for HB)

The form only asks questions contextual to the citizen's circumstances which means the form is inherently shorter and error is minimised - because they cannot report a change that is out-with their circumstances.

↓

Opportunity to add additional information and to upload evidence. The evidence upload page is dynamic and requests the necessary items indicated by the change type

↓

Submit form

NEC mri REAL ESTATE SOFTWARE CIVICA

Once Submitted:

The form handles all of the logic to derive the correct order for changes to be passed to and updated in the back-office. For example, a citizen reports:

Partner moved in on 21/11/2017

New earnings from 01/11/2017

A change in rent from 01/09/2017

The change in circumstances form will extrapolate out what needs to happen and will push XMLs to the back-office as follows:

XML 1 01/09/2017 Change in rent

XML2 01/11/2017 Change in rent & New earnings

XML3 21/11/2017 Change in rent, New earnings & New partner
This intelligence ensures that the back-office benefit periods are updated in the exact same manner they would have been updated were the changes done manually.

Housing Benefit Award Accuracy

Name, DOB, Address, NINO and contact info collected. Completed by details collected.

Can only proceed if the Surname, DOB & NINO & postcode match back office in a real-time check as a minimum

↓

Customer is presented with their current claim information and asked to either indicate there has been a change, or to confirm the details remain the same.\

If there has been a change, further information is requested, with the questions appearing dynamically, according to the answers given.

↓

Opportunity to add additional information and to upload evidence. The evidence upload page is dynamic and requests the necessary items indicated by the change type

↓

Submit form

Once Submitted:

As finding an existing claim is a prerequisite to proceeding to completion in the HBAA form the data sent is always linked to the appropriate claim upon submission.

The form handles all of the logic to derive the correct order for changes to be passed to and updated in the back-office. For example, a citizen reports:

Partner moved in on 21/11/2017

New earnings from 01/11/2017

A change in rent from 01/09/2017

The change in circumstances form will extrapolate out what needs to happen and will push XMLs to the back-office as follows:

XML 1 01/09/2017 Change in rent

XML2 01/11/2017 Change in rent & New earnings

XML3 21/11/2017 Change in rent, New earnings & New partner
This intelligence ensures that the back-office benefit periods are updated in the exact same manner they would have been updated were the changes done manually.

Local Council Tax Support

Name and Council Tax Account details collected.

When the account is confirmed, customer can only proceed if the account has been matched and the customer confirms the occupants are correct.

↓

Household details collected. Checks for:

Employment

Residency

Previous claims

Other Occupants, Household & Non Household

↓

Income types collected

↓

Details, amounts & frequencies of incomes collected

↓

Form calculates amount of support & gives opportunity to claim backdating

↓

Submit form

NEC

Currently developed for NEC sites only, this form is a little different, as it calculates the discount that a customer is entitled to, based on a banded scheme, and applies it to the council tax account.

The settings allow for automatic backdating and changes in circumstance, depending on the LA scheme rules.

Once submitted:
Checks the account number, contact details and for existing occupancy discounts.

Adds backdating notepad entry if applicable

Creates the Local Council Tax discount from the appropriate date

Updates Contact details

Calculates the bill

Adds a notepad entry