Digital Experience Platform for Local Government

Service Definition

Crown Commercial Service Supplier

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Overview

IEG4's Digital Experience Platform (DXP) for Councils is a comprehensive solution designed to empower all tiers of local authorities to provide superior digital services. From online forms and payments to self-service portals, web content management, automated workflows, and a dedicated Customer Relationship Management (CRM) module, the platform offers a range of tools that can be flexibly customised to meet each council's specific needs. With IEG4's Digital Experience Platform, councils can significantly enhance their efficiency, reduce costs, and deliver a seamless digital experience to their customers, all with a user-friendly interface that makes it easy for staff to manage and update the platform.

The platform comprises several key modules, each enabling your staff to build and deploy user-centric services with the potential of automation and integration with many of the common lines of business systems used within local government. This streamlines processes, relieving your staff of administrative burdens and allowing them to focus on more strategic tasks.

With over twenty years of providing digital solutions, our platform has enabled councils to:

- reduce phone calls/face-to-face contact by up to 50% across ALL departments
- replace document management systems corporately and enable over 184 separate processes to be managed/tracked by customers online
- create a complaints management application
- create a Registrar's service

Our no-code solutions are a game-changer, empowering your team to rapidly and seamlessly design, develop, and deploy digital services. These services not only enhance customer engagement but also provide a cohesive, cross-council framework that integrates comprehensively with back-office applications, making it easier for your staff to manage and update the platform. This enhanced customer engagement will give your team the confidence to serve your customers better.

From our CMS-powered website or dedicated customer portal, your customers can:

- find out when their next benefit payment date is
- find out the day of their council rent statement
- find a copy of their council tax bill
- find details of their taxi licence and when it needs to be renewed
- request a bulky waste uplift
- see when the fly-tipping they reported will be resolved and the outcome of the investigation
- track the progress of a social care finance assessment
- pay a parking fine
- search for community services to help a parent get out and about more or help around the home
- and much more...

As customer online expectations mature, councils must navigate inherent complexities and present them in a manner that is easy for users to understand and use. This simplifies self-service and minimises unnecessary interactions. The IEG4 approach promotes a unified tool suite that provides consistent, engaging user experiences underpinned by robust integration. This represents a significant transformation from the current state in many councils—a disparate assortment of pieced-together solutions offering varied user experiences. With IEG4's Digital Experience Platform, councils can streamline their services, reduce unnecessary interactions, and provide a more satisfying customer experience.

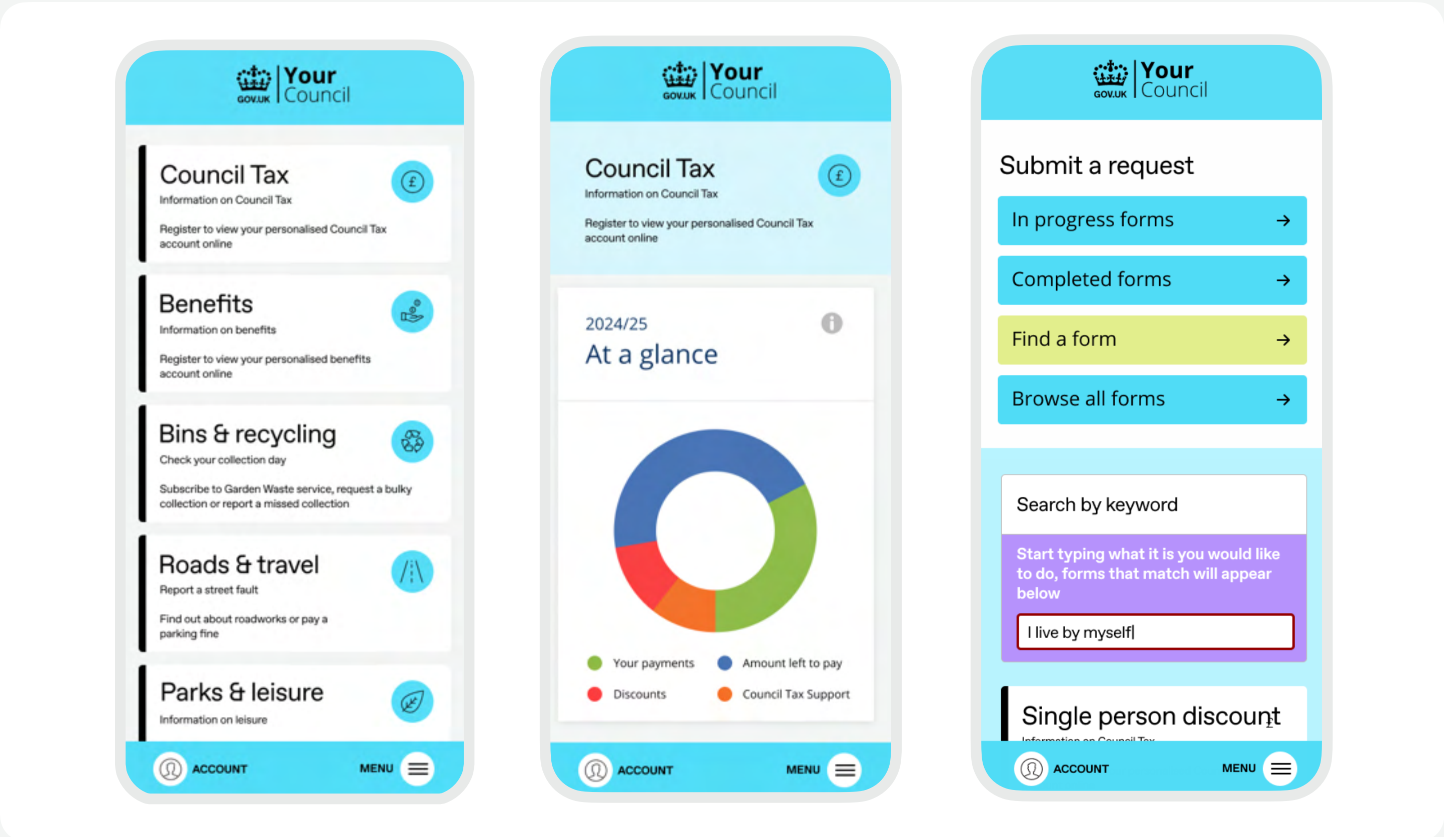
Customer Portal

IEG4's customer portal solution is a state-of-the-art platform designed to revolutionise how citizens, businesses, and councillors interact. By leveraging advanced digital technologies, the portal offers a seamless, user-friendly interface that enables efficient service delivery and access to information. This integrated solution facilitates improved communication and transaction capabilities, making it easier for users to complete processes online, from submitting applications and making payments to accessing essential services. Tailored to meet the specific needs of local authorities, IEG4's portal ensures that citizens and businesses can engage with their council more directly and effectively, enhancing overall service delivery and operational efficiency.

Customers can also access the Council's online forms within the portal. When completed, these can trigger trackable requests based on user-defined workflows within the solution's workflow management and automation tool.

Our Portal solution also breaks down traditional barriers that customers face when transacting with councils by providing them with the ability to:

- sign-in quickly and easily using email/social media/SMS
- view their data in a way designed for optimum user experience
- complete online requests
- track the progress of any request/report they make online



Our portal solution is fully mobile responsive, accessible and cloud native.

Features

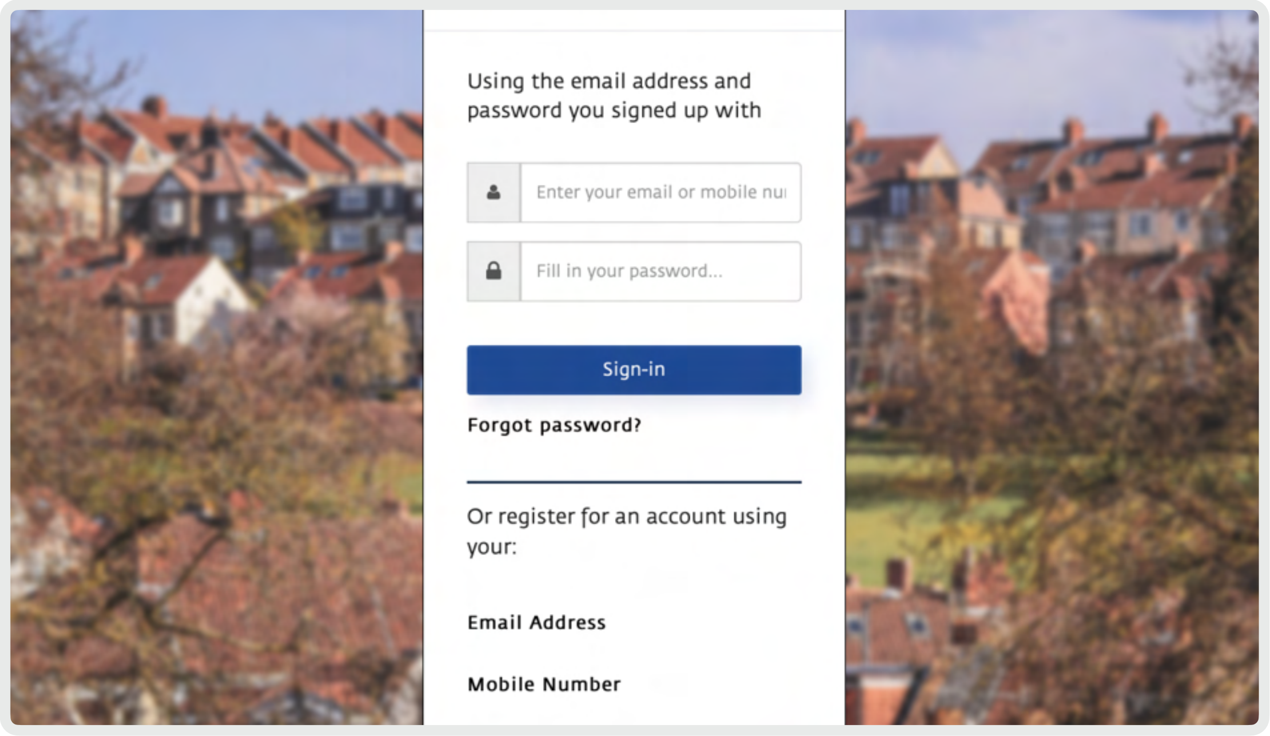
The following elements are present within the portal solution:

Single Sign-in/Register

- Via Email/Password
- Using the following OAuth2 services:
  - Microsoft
  - Google
  - Facebook accounts
  - NHS App
- Address look-up built-in
- Ability to link to your privacy statement

Sign-up with mobile

We acknowledge users' growing preference for messaging services over traditional email communication. Our solution has been enhanced to allow users to create an account using just their mobile phone number. Furthermore, embracing open standards integrates this feature with the government's GOV.UK Notify service, ensuring seamless and efficient communications. This development reflects our commitment to adapting to modern communication trends and meeting the evolving needs of our users.



Register / sign-in options

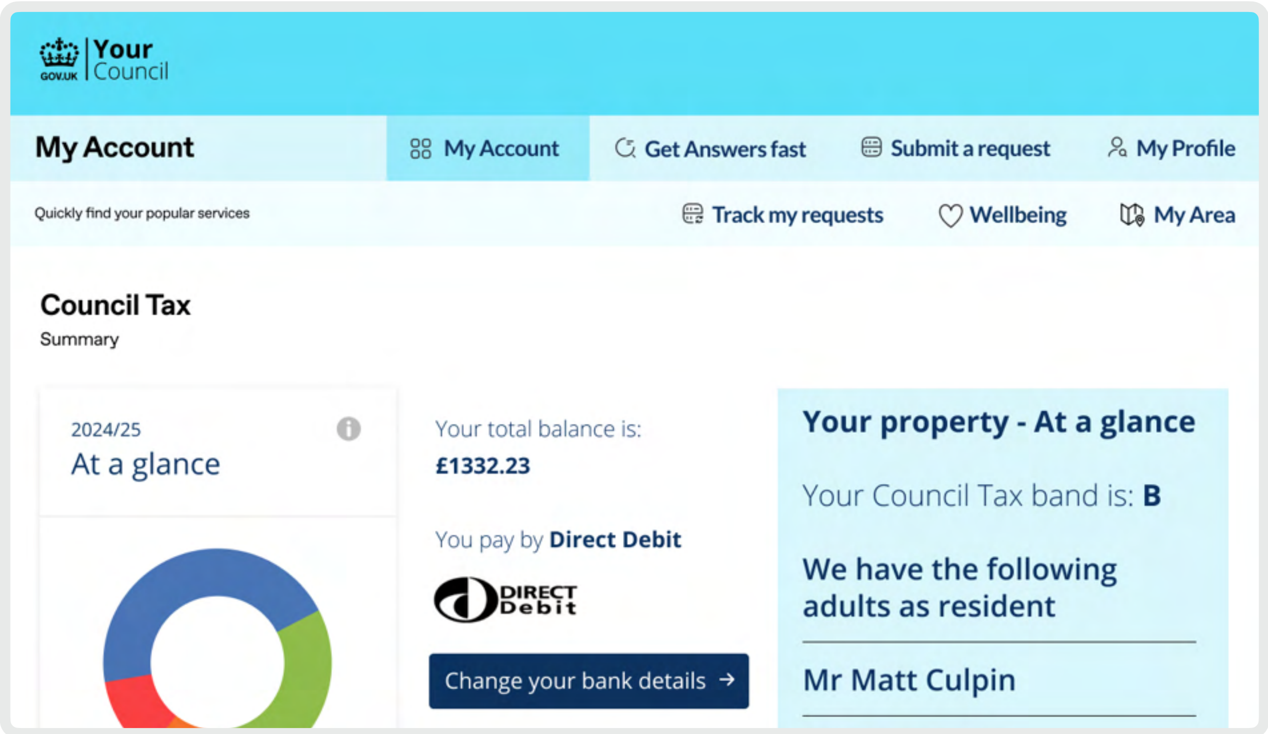
My Account - Personalised Dashboard

Customers increasingly demand digital services tailored to their individual needs. The ‘My Account’ function caters to this by allowing customers to customise their digital accounts, highlighting their frequently used service areas and content.

Upon their initial login to 'My Account', council staff can establish a welcoming and informative message to guide the customer on the functionality and benefits of the account.

Customers can add content to their ‘My Account’ portal in any department. By doing this across various council departments and content types, they can forge a highly personalised dashboard that reflects their most valued interactions and information from the council.

We are proud to position our portal solution as a pioneering digital service, uniquely capable of displaying real-time data from multiple back-office applications, all tailored to the user's specific preferences. For example, a council tenant with a benefit claim can customise their ‘My Account’ page to display their rent statement and benefit claim details, providing a consolidated view of their most pertinent information. Customers can personalise content for any relevant service area where information is available.



My Account Dashboard

Get Answers Fast

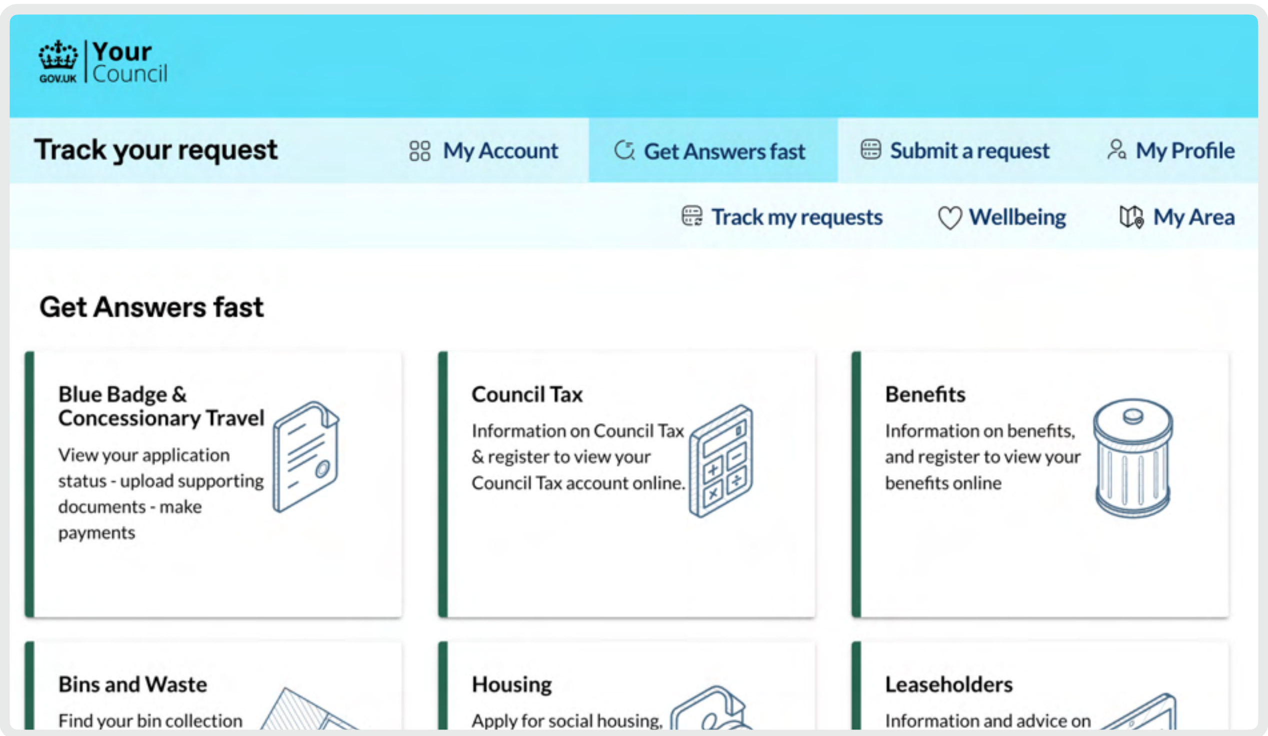
This is a single, simple-to-use view of the council for customers, which includes:

- Customisable service areas enable all council areas to have specific content / FAQs surfaced to customers, which are also customisable. You control the departments shown and the content within them.

- Real-time authentication and personalised content where back-office integration is available, e.g. Bins/Waste, Council Tax, Benefits, Business Rates, Housing, Leaseholders, Environmental Health, Licensing, etc.

- The content shown to customers can be fully customised by council staff.
    - The council can change what is shown, when, and how it is shown.
    - The council can dynamically change what is shown based on the back-office data retrieved. For example, if the account balance is> 0, show content, and if not, don't.
    - The style associated with your content as presented is also customisable. This means that you can adapt the look and feel of the information display as your corporate branding changes or you merely want to update how content is displayed.

- Enabling data to be presented in charts, lists, tables, accordions, cards, etc., without assistance from IEG4
- A library of pre-built online content for each council department to enable quicker implementation



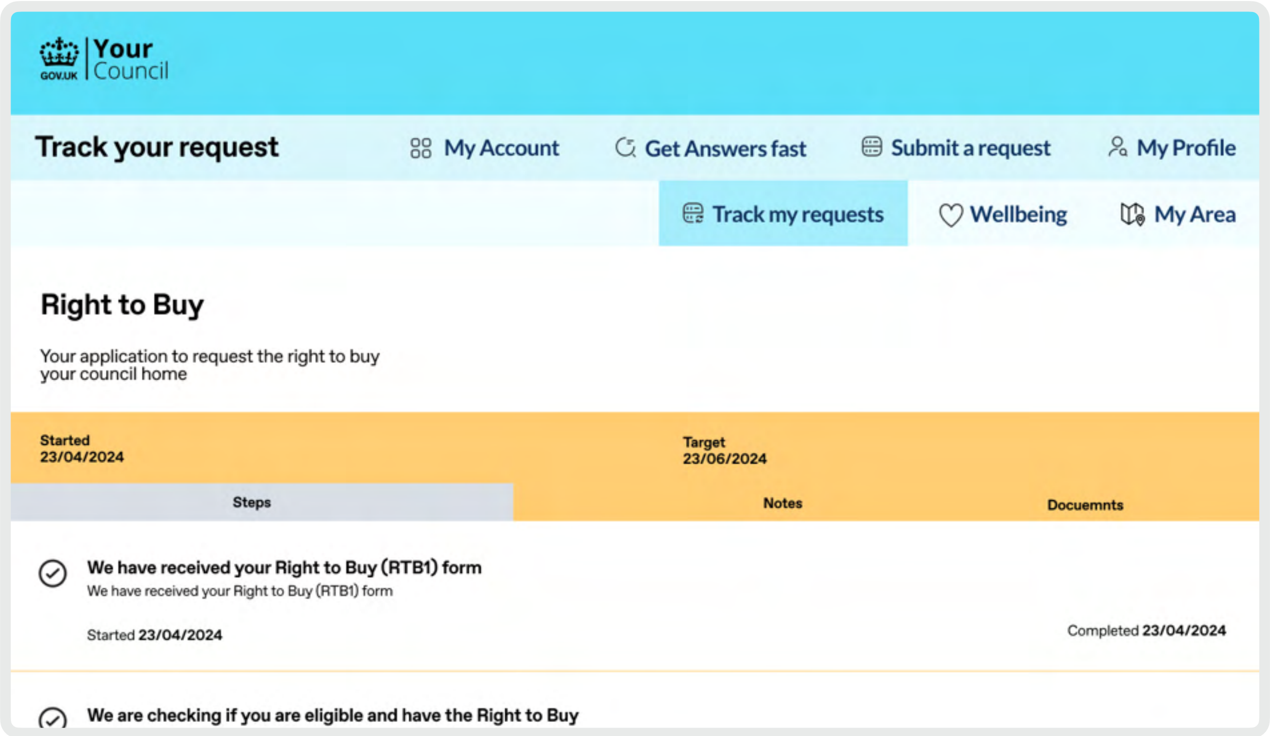
Get Answers Fast

Submit and Track Requests

- Ability to complete online forms within the portal with name, address, contact details etc. pre-populated into forms
- Ability to access forms saved for later
- Ability to view forms that have been completed
- Smart search tags are able to be added by the organisation
- Ability to search for online forms

The ability for customers to:

- Track the progress of requests the instant they apply/report/request
    - Be notified when progress happens within a process automatically with custom email/SMS content
    - Receive contextual messages as and when every different process/process stage is started or completed
- View information requests /notes added by council/contractor staff
- Add responses back to questions posed by council/contractor staff
- View documents associated with their process
- Upload documents in response to requests for additional information



Track your requests

Your Profile

Provides the ability for customers to:

- Change their:
  - name
  - address
  - email address
  - mobile number
  - date of birth
- Link their Facebook account.
- Set up notifications to be sent*
- Users can set their preferences for notifications of any type. Updates can be sent via SMS, WhatsApp, and Facebook Messenger.

*Where Broadcast is licensed

Friends, family and authorised users

Recognising that there are often use cases where a family member, friend, or carer might assist with or look after a person's affairs, IEG4's portal solution includes a feature within the customer's profile called 'Friends and Family'. Additionally, businesses can use a similar feature, allowing staff to act on the business's behalf, facilitating transactions and managing services.

'Friends and Family' enables a citizen to share their account with another person or people. They can do this quickly and easily and can revoke access anytime. A person given access must agree to the access and can also remove it themselves. Those given access cannot grant access to other users.

This functionality enables family, friends, and carers—and, in the case of businesses, designated staff—to help ensure that their loved ones or clients are receiving all of the services they should be, keeping up to date with bills and benefit payments, and completing/tracking service requests on their behalf.

Customer Timeline

This feature provides customers with a comprehensive view of all activity associated with their account, accessible at a glance through the Customer Timeline. Customers can easily track and review the completed forms, notifications received, account access instances, and interactions with the council. Additionally, the timeline details the methods for sending notifications, such as Email, SMS, WhatsApp, and Facebook Messenger, ensuring customers have a clear and complete overview of their communications and activities.

Dedicated portals for specific audiences

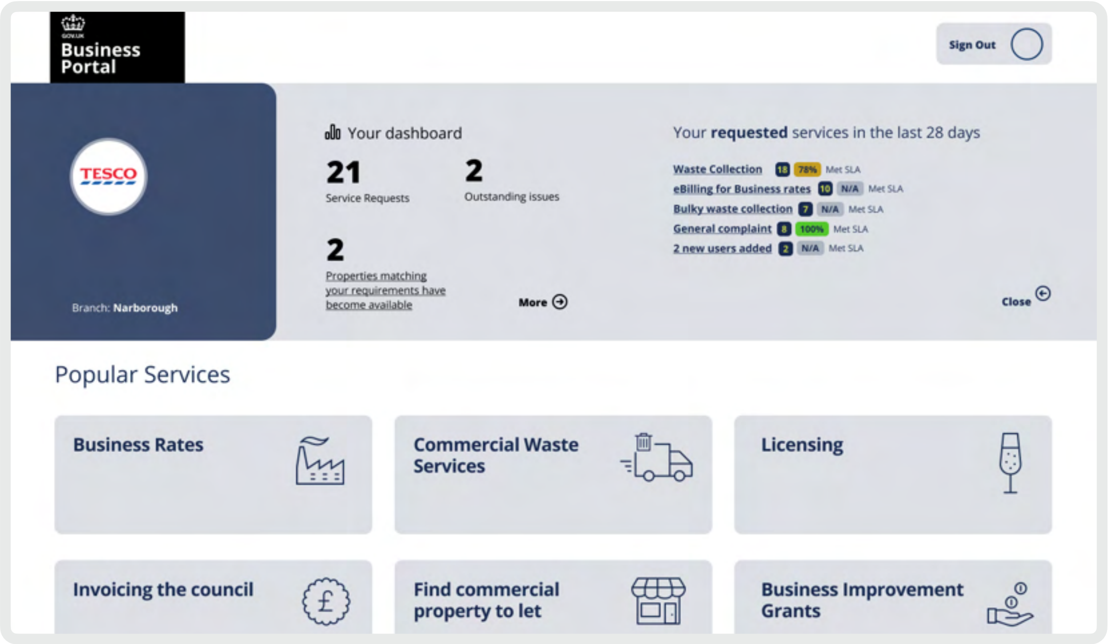
IEG4 offers a Portal Solution that includes a comprehensive portal feature allowing for the expansion or contextual customisation of your digital offerings. This feature enables the creation of sub-portals designed for specific user groups such as citizens, businesses, councillors, HR departments, or leisure services. Each sub-portal can contain a subset or entirely different content from the main portal, allowing precise control over the council departments or service areas accessible to a citizen or business, the forms they are allowed to complete, and the services they can monitor and track.

Citizen Portal Functionality:
For citizens, especially those who work within the council area but live outside of it, the portal can be customised to exclude services that are less relevant to them such as Council Tax, Social Care, and Education, and focus on areas such as Business Rates, Licensing, and Trade Waste, which are more pertinent to their needs.

Business Portal Functionality:
On the other hand, businesses can have portals tailored to exclude personal citizen services such as Council Tax but include critical business-related services like small business rate relief and trade waste management. This customisation ensures that businesses have access to relevant forms and service tracking pertinent to their operations.

Councillor Portal Functionality:
Councillors can benefit from a dedicated portal that focuses on governmental and administrative tasks which councillors can undertake on behalf of their constituents, streamlining their access to necessary forms and service tracking relevant to their roles and responsibilities.

The Portals feature also allows for the addition of custom hostnames and branding, facilitating the creation of a dedicated URL that can be integrated into your website or other platforms, a dedicated header or navigation tailored to the specific sub-portal, and custom branding unique to each sub-portal.



Example Business Portal

Account Management

The Account Management function enables councils to view those customers signed up and to see:

a) those signed up, with active accounts
b) those where the email validation process is in progress
c) those where the email provided was incorrect and so email validation failed

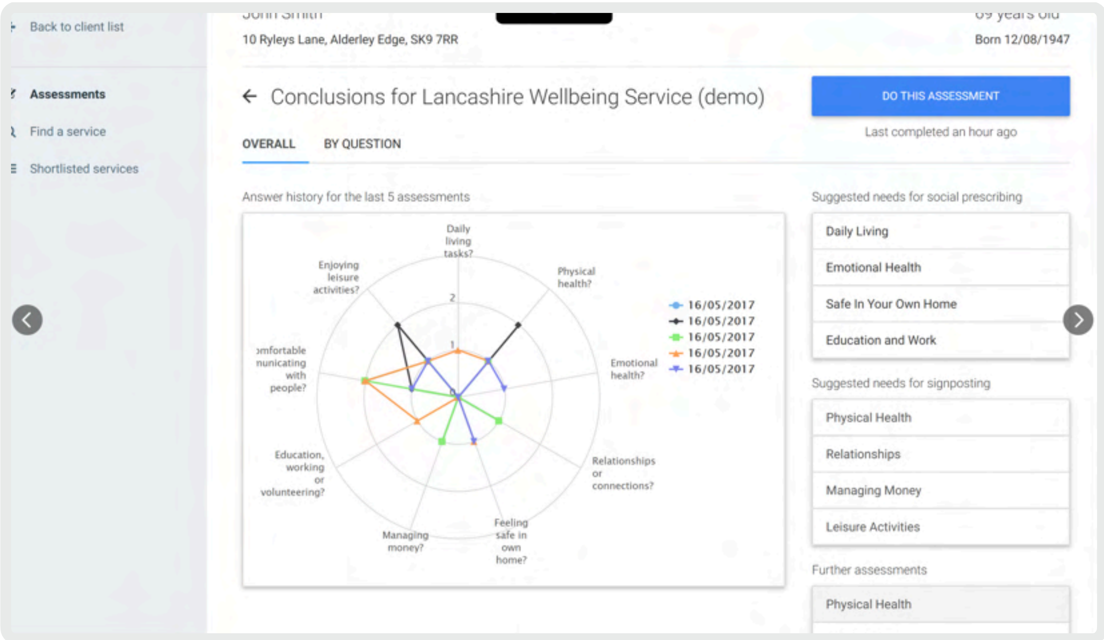
Councils are also able to quickly find an account using the search function. They can then:

a) see how they signed up
b) whether they currently have access
c) disable the account e.g. where they no longer wish to have an account:

Social Prescriber & Place-based Directory of Services

It is becoming increasingly clear that the state of one's health is intricately linked to an array of factors - these encompass the physical realm, such as exercise and diet, but also extend to the social, economic and environmental elements of our lives. This multifaceted understanding of health is driving a shift towards holistic models of care that aim to address each of these areas. One innovative approach is social prescribing - a method that tailors care to individuals' specific needs, granting them more autonomy over their health journey.

IEG4's Social Prescriber system is at the forefront of this new wave of health and social care. This tool empowers Local Authorities and Healthcare providers with the ability to construct, implement, and manage assessments designed to gauge each citizen's unique needs and circumstances. This is achieved through a comprehensive quality-of-life evaluation which enables citizens to self-assess.



Once the assessment has been completed, the Social Prescriber meticulously pairs citizens with a personalised, non-clinical service delivery. The flexibility of the system means that this could result in signposting towards relevant resources, a tailored social prescription, or a referral to a specialist if needed. This ensures a clear, navigable path for each citizen that resonates with their individual circumstances.

Additionally, every step of the process is captured and incorporated into each citizen's personalised health plan. Not only does this provide a complete picture of a citizen's health trajectory, but it also enables the tool to keep a log of assessment scores within a secure and personalised WellBeing dashboard within IEG4's citizen portal. This valuable data paves the way for insightful comparisons over time, offering a clear perspective on the progression and effectiveness of an individual's care plan.

The Social Prescriber by IEG4 serves as a pioneering solution in health and social care. It effectively acknowledges the myriad factors contributing to an individual's health while respecting and prioritising each person's unique experiences and needs. This cultivates a more empowering, personalised approach to health and social care, wherein citizens have increased control over their health outcomes.

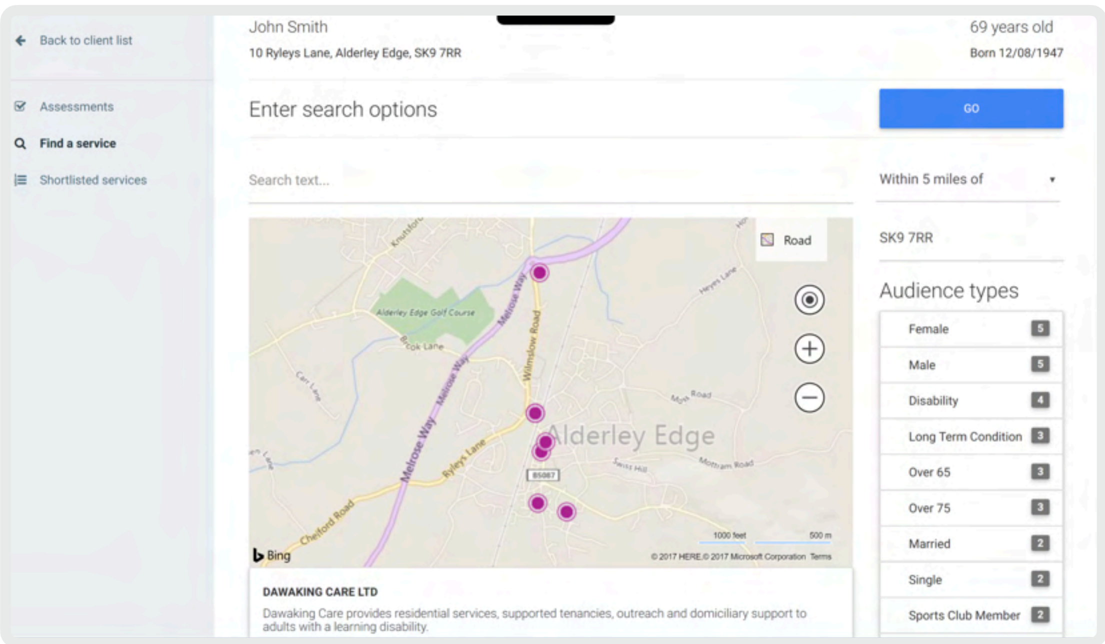
IEG4's Place-based Directory of Services (DoS) is a solution innovatively designed to function in harmony with the Social Prescriber tool to bolster the efficacy of self-care and preventative strategies. At its core, the directory serves as a comprehensive repository of quality-assured, ultra-local services, which are pivotal in successfully implementing any self-care or preventative initiative.

Not just a simple directory, this platform invites service providers to actively participate by adding and updating their information. This ensures a living, breathing directory that maintains relevance and accuracy. All entries undergo a meticulous moderation process carried out by dedicated staff, further guaranteeing the validity and currentness of the data. Through this approval process, a reliable custodian role is established, keeping the service information consistently up to date.

Each entry in the Place-based Directory is well-defined, complete with a venue, a set of relevant tags, and the times during which the services are available. This comprehensive approach allows for a straightforward, user-friendly navigation, making it easier for citizens to identify and access the services they need.

To maintain the highest standards of service provision, providers are routinely encouraged to refresh their offerings. If they fail to keep their information current, they risk being excluded from the directory. This mechanism ensures that the citizens are always connected with the best and most suitable service providers.

In essence, IEG4's Place-based Directory of Services, coupled with the Social Prescriber system, constitutes a pioneering approach to preventative health strategies. It facilitates an effective, streamlined self-care journey, providing citizens with easy access to a range of trusted, local services that can cater to their unique needs. Through the combination of a dynamic directory, rigorous moderation, and ongoing provider engagement, this solution places citizens at the centre, fostering a robust and proactive health culture.



Both the Social Prescriber system and the Directory of Services (DoS) are incorporated within IEG4's Citizen portal. This integration offers a convenient, streamlined interface for citizens to access these essential services. An attribute of the portal is the Friends and Family feature, which facilitates a supportive, inclusive approach to health and social care.

Understanding that there are circumstances wherein a citizen may require assistance with managing their health and social care, the Friends and Family feature enables citizens to nominate a trusted individual, such as a relative or friend, to act on their behalf. This could be particularly beneficial for those who have a Lasting Power of Attorney in place, or for citizens who need assistance due to physical or cognitive limitations.

What sets this feature apart is its flexibility and granular control. The Friends and Family feature can be applied on a service-by-service basis, offering a level of adaptability that aligns with the individual needs and preferences of each citizen. For instance, if a citizen wishes for a relative to assist with their wellbeing assessments but prefers to manage their financial affairs independently, this can be easily arranged.

The nominated individual would then be granted access exclusively to the areas specified by the citizen, in this case, the wellbeing dashboard. This allows the nominated individual to support the citizen in the management of their health, whilst maintaining the citizen's privacy and autonomy in other areas.

Broadcast

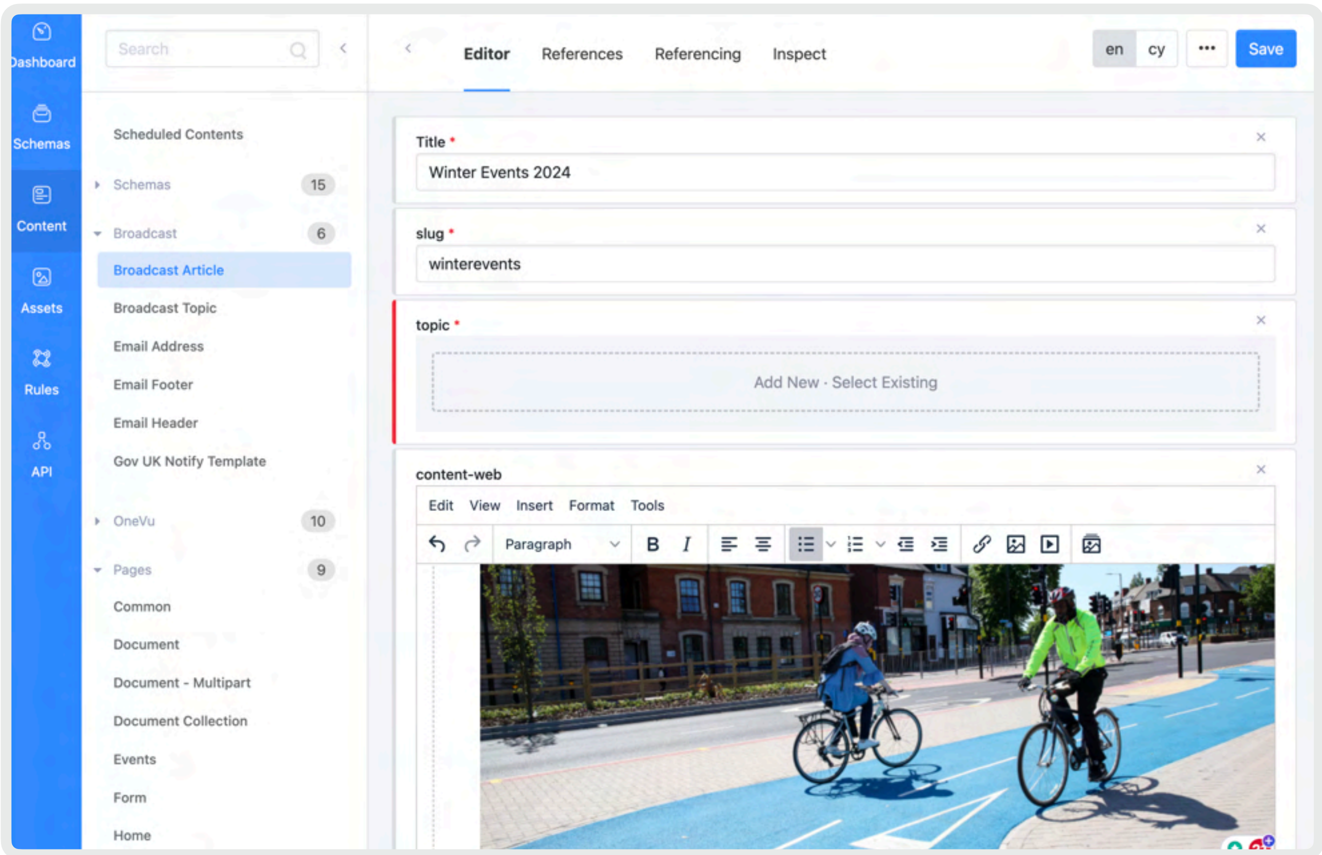
Broadcast is IEG4's solution for eNotifications, offering a comprehensive dynamic messaging system for individual service updates or widespread communication through email, SMS or social messaging services.

Broadcast meets your needs for customer communications by keeping customers informed of progress and fostering proactive relationships. This could range from a simple reminder that a licence or permit is nearing expiration, to a notification that an updated social care financial assessment is required.

We offer a distinctive solution that allows residents and businesses to register for notifications via Email, Text Message, WhatsApp, and Facebook Messenger, using channel-agnostic messaging rather than relying solely on email.

The functionality includes support for:

- Generic, citizen-opted notifications, e.g., marketing preferences.
- Dynamic event-driven notifications, e.g., permit/licence expiration.
- Track My Requests – automatic updates on progress.
- Two-way interactions, e.g., a council officer requests information to support an application. The citizen receives this via Facebook Messenger, and their response is sent directly back to the officer.
- Message delivery options include email, SMS, WhatsApp, and Facebook Messenger.
- Dynamic messaging can also be presented to customers/council staff within the citizen/ customer service portal.



WebVu components

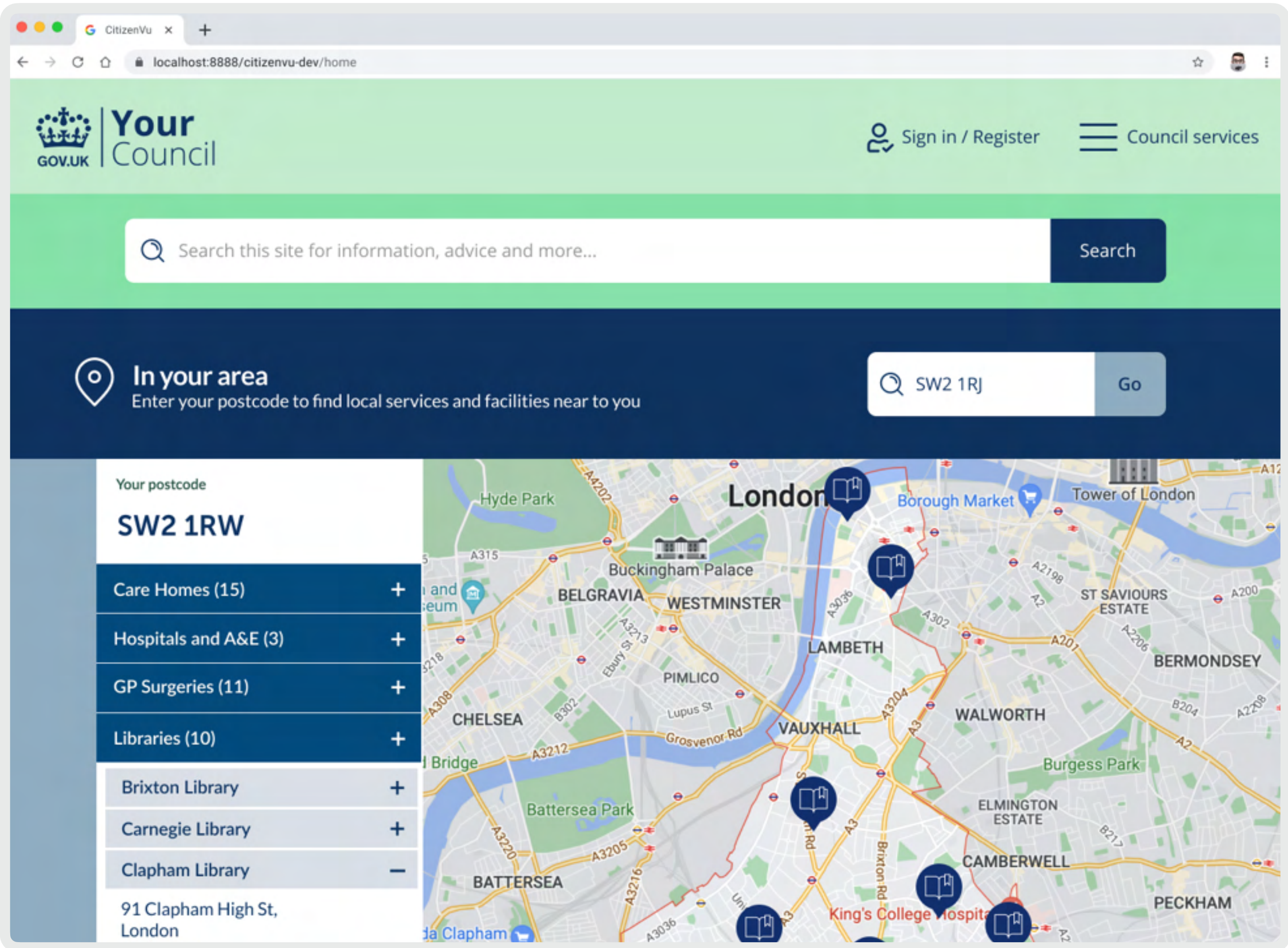
IEG4's WebVu components, enable councils that use their existing CMS product to implement self-contained web applications within their current website. These applications can display various types of information from the IEG4 customer portal, such as forms and request tracking features. This integration offers a seamless experience, enabling customers to transact directly from the council's website without leaving the site.

WebVu components are designed to be aesthetically adaptable, matching the style of the specific website or webpage they are integrated within, utilising standard HTML and CSS for customisation.

These components bring together transactional functions of council services which removes the need for disruptive redirects, thereby ensuring a continuous and smooth user experience.

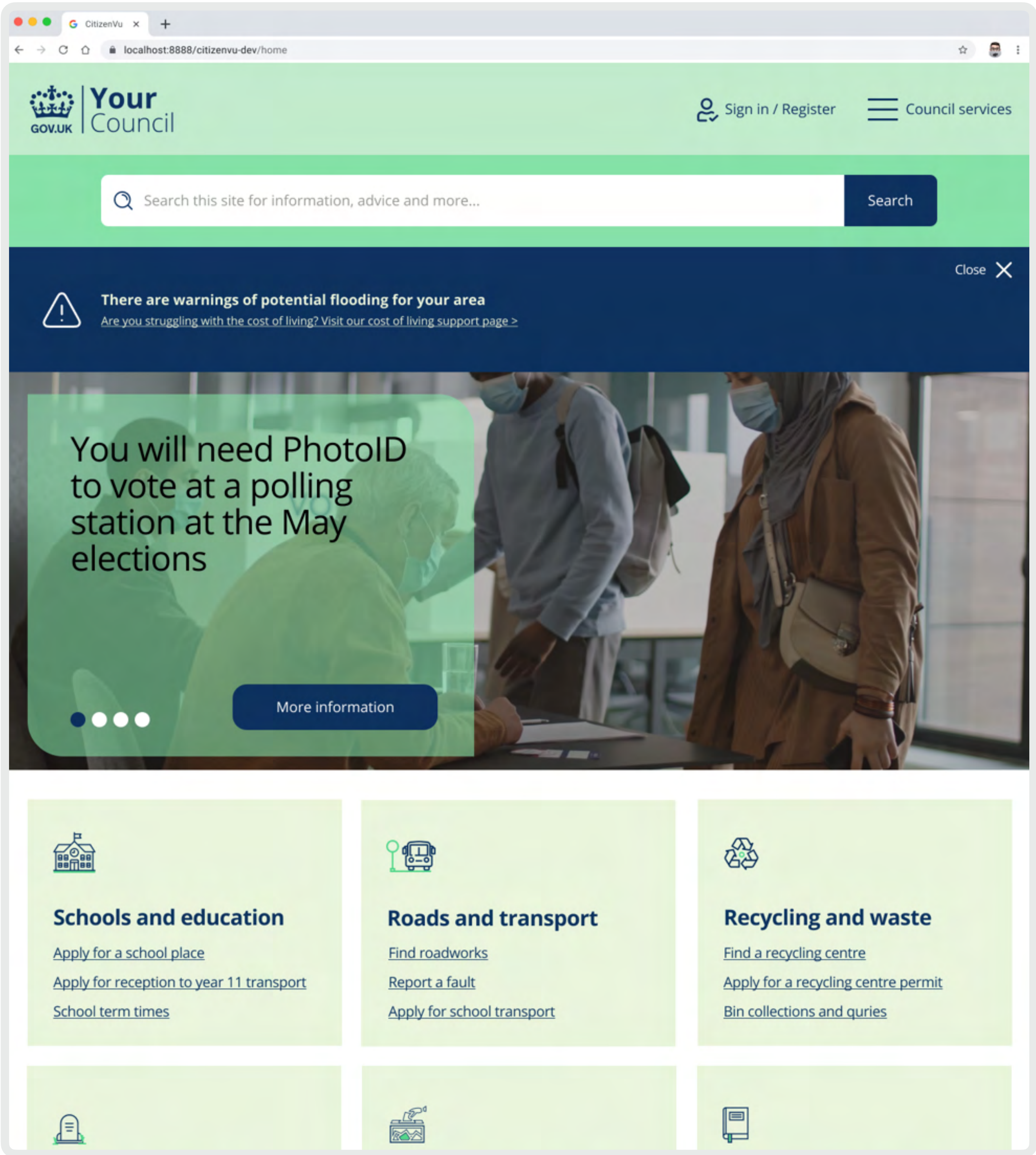
Furthermore, WebVu components are deployable on council websites that use Drupal, Umbraco or indeed any modern CMS, enabling councils to leverage open-source collaborations, such as those funded by the Department for Levelling Up, Housing & Communities. This has contributed to initiatives like LocalGov Drupal.

With WebVu components, a high level of personalisation of the website is also achievable, being powered by the IEG4 customer portal to enhance the overall user experience.



My Area fiunctioanlity displayed withing a WebVu component

Website Content Management System



IEG4 provides a web platform designed for local government. The platform features a headless CMS web content management system that separates content management from content delivery. This allows content to be presented across various channels and devices in a platform-independent manner. The platform is also designed to create accessible and responsive websites. It offers non-technical administration management tools and focuses on integration and extensibility for seamless user journeys between content and transactions.

Benefits to you

- Secure, scalable and extensible Headless Content Management System
- WCAG (latest) AA fully accessible site templates for your gov.uk website
- Role-based user management
- Schedule content publishing
- Automatic content expiry
- Preview content before submitting to publish/approval
- Asset manager for images, documents and videos
- Content version history, compare versions and rollback
- Image editor
- Accessible content, engaging functionality, robust workflow and governance controls
- GDPR-compliant customer portal components, when used in conjunction with IEG4's Portal product
- 1200+ LGaaP online forms
- Secure and resilient hosting and 3 environments for safe publishing (Dev > Test > Live)
- Effective support backed by a dedicated service management team
- Ability to add Analytics and/or accessibility monitoring script tags to support Google Analytics
- IEG4's 17 years of channel shift experience in local government
- Easy edit your design with Stylesheet access
- Self-service centric with out of the box integrations with Revenues and Waste systems*

Benefits to your customers

- Quickly discover relevant content through optimised user journeys
- Engaging, feature-rich and personalised web experiences for both signed-in and non-signed in users
- Joined-up, one-stop access and service channel with IEG4's LGaaP form library
- Customer MyAccount functionality, when used with IEG4's Customer Portal product, provides a seamless and trusted user journey between web content and transactions
- Fully accessible website on any device
- Deliver various content types, including text, imagery and downloads
- Friendly URLs make it easier for customers to navigate and find service information quickly

Customer Experience

Your website, serving as the digital front door to your organisation, is a crucial platform that should showcase your organisation at the cutting edge of digital design and technology. It should also maintain seamless transactions and accessibility for all. The platform that powers your website should aim high concerning design, code, and content, creating an immersive and enjoyable environment reflective of the organisation's values.

Our platform is designed with a user-centric approach, offering inclusive, modern, seamless experiences. This design philosophy aims to foster emotional connections with your users, ensuring they feel valued and considered. The design is not overly cluttered and confusing but minimal, direct, and delightful, prioritising the user's needs and experience on every page.

People are at the heart of any great place, and they need to be at the front and centre of your website's experience. To tie in the councils' business needs alongside user needs, a holistic approach to how humans interact with the website will be taken. From content to colours, typography to image choice, animation, and interactions, the website will present your organisation as a council with big ideas and innovation.

Our modern coding practices are not just about functionality but about creating an engaging and enjoyable customer experience. We will transfer this knowledge to your digital team, inspiring them to push the boundaries of innovation. The site design should be aspirational and forward-thinking, positioning the council as a leader in digital customer experiences.

Like any modern website, people form an emotional connection with the brand or organisation that has created it. Therefore, users should delight in the visual experience while navigating through a site quickly. With this in mind, once the user tasks are signposted clearly, transactions are stress-free and, above all else, simple; what remains exists to enhance the customer's experience and develop your organisation's reputation beyond the mundane. This enhancement of the online relationship between the local authority and the customers it serves will be vital in leading users towards the digital channel as their preferred choice.

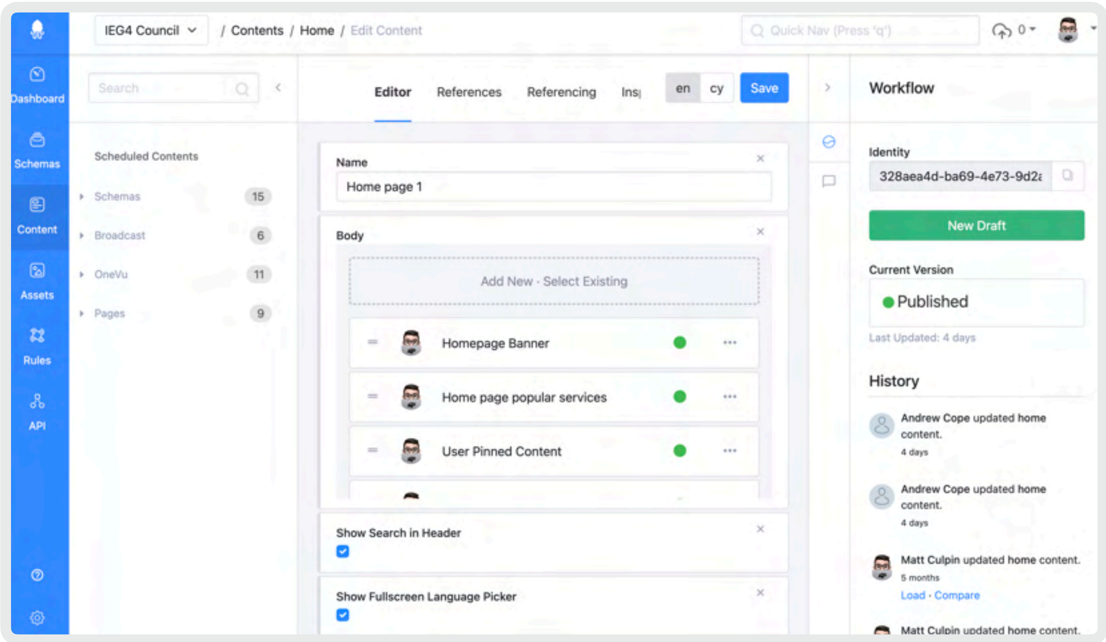
Your website will be more than just a digital platform. It will be a window to many facets of your organisation, reflecting the best the council has to offer. This representation should instil a sense of pride and confidence in your team. The website's professional and unified design, with frictionless transactions as a priority, will meet the expectations of users who demand a human connection alongside technology.

The most important and constant lever of power in this rapidly changing digital landscape is humanity. Users are only users when they are using your service. Humans are humans. Always. We will work with you to provide a website looking at things from the perspective of a human.

Website Content Management System (WCMS) | Features

The WCMS provides a non-technical admin interface to manage the organisation and publishing of any content type. New content schemas are easily created; however, to aid and accelerate implementation, IEG4 has pre-configured the most commonly used content schemas within local government.

Publishing Types



Content / publishing types

Pre-defined content schemas

Homepages: These are feature-rich multipart pages with reusable components that can surface information from within the WCMS or external data sources such as social media feeds, personalised information from back-office systems or, optionally, IEG4's Portal product.

Service Landing Pages: Similar to Homepages, these add functionality for dynamically displaying related content relevant to the service area. This can include associated pages, forms, downloads, or events.

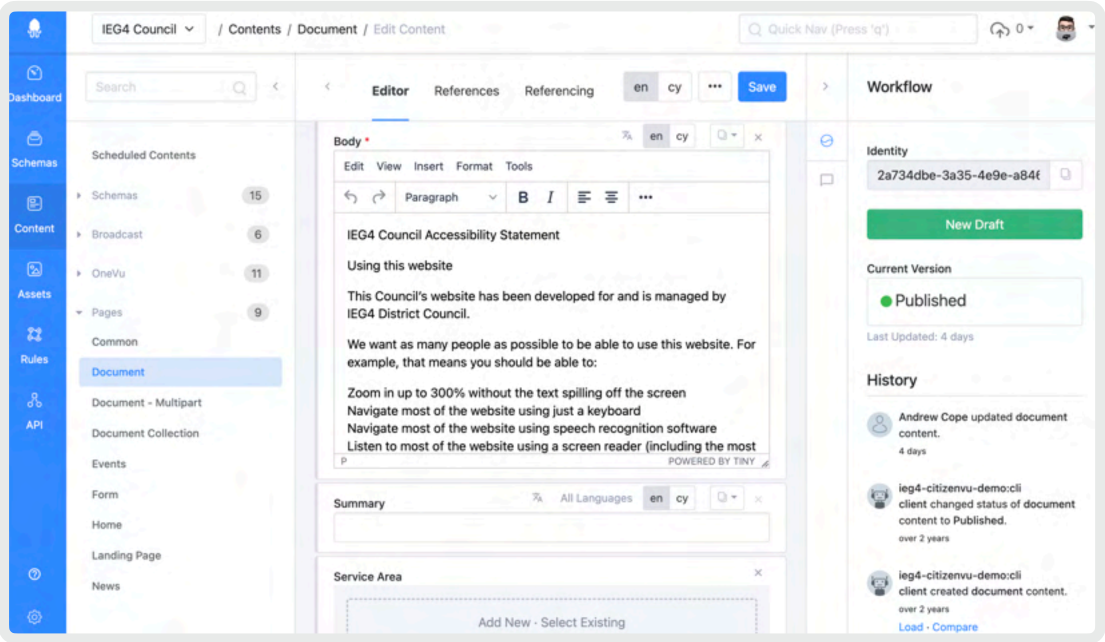
News: A dedicated content type designed for publishing time-sensitive news articles about your organisation. It includes simultaneous publishing to social media as a feature using the rules within the WCMS.

Events: This content type allows creating and managing a calendar of events on your website. Features include recurring events and options to add to a user's calendar, with the capability to publish to social media simultaneously using the rules within the WCMS.

Banners: The banner content type enables you to add image banner content to your Homepages and Service Landing Pages across the site. Banners can also be used for site-wide announcements placed in a dominant area of the website, such as the header.

Document Pages are commonly used to publish detailed service-related content on your website. They can include links, images, tables, etc., and can be structured as single or multipage documents.

Document Editor: Provides a WYSIWYG Text Editor that enables you to format the content you produce for your website. Basic word processing skills are enough to create pages that look consistent with the rest of your site regarding font use, layout and colour, etc. Editors with specific user permissions can also embed external content such as YouTube videos. The editor also enables you to add images from within the asset library.



Document editor

Asset Library: Media files, such as images, video and audio files, can be uploaded and any document type, such as PDF, Word & Excel, etc. and then reused in any content type across the site. Admin users can define folder structure, enabling logical storage areas and easy-to-find access.

User management and workflow: Highly configurable workflow controls can provide governance in line with your existing business process to help ensure quality, accuracy and compliance. This includes the ability to create roles of predefined permissions for user management. For example, IEG4 has pre-configured roles for Owner, Developer, Editor & Reader, which reflect the most common user permissions for publishing.

Versioning & Track Changes: Track changes will let you compare previous versions of your content and also allow you to roll back to any previous version. Our visual interface allows you to compare versions side by side and roll back to any previous version.

Friendly URLs: All pages benefit from semantic, human and machine-readable, search engine-friendly URLs for all content.

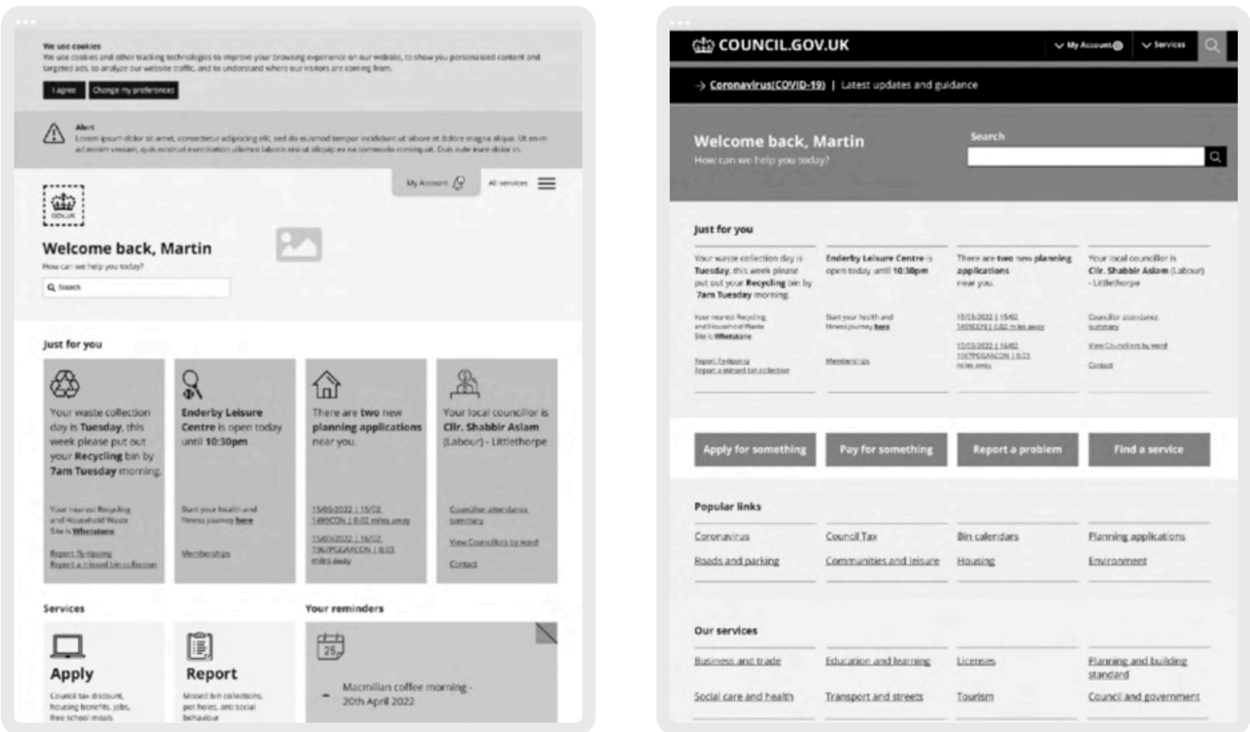
LGaaP Forms: Provides 1200+ forms available within our LGaaP library curated by IEG4 with many having been created by customers, all of which have all been through user testing in terms of usability/accessibility and will therefore meet WCAG 2.2 AA standards.

Accessibility: Designed to deliver content that meets the latest WCAG AA guidelines for web accessibility. Our fully-managed accessibility service aims to ensure that the service you provide is accessible for all users, including customers with visual impairment and users of assistive technology such as screen reader software, and ensures that your organisation complies with the Equality Act.

Website Templates: Comes with a choice of two website templates; each template allows for branding to be applied for logo and colour schemes to match your digital brand guidelines. To additionally ensure accessibility meets AA compliance we limit the usage of custom fonts within our pre-designed templates.

Template A (see wireframe Template A example) features a hero image for all Homepage/Service Landing pages, which can be content managed within the CMS tools. Icons are also included; however, these can be optional for service area buttons and navigation. Icons will be provided as .svg file types, which ensure scalability being vector and not image-based. Homepage/Service Landing Pages are modular in design and can be configured within the CMS tools to provide content prioritisation around visual hierarchy. This template has been designed by reviewing many UK Council website designs and features much of the common functionality found on these website's Home and Landing pages.

Template B (see wireframe Template B example) closely follows the Styles, Components and Patterns as described within the Government Digital Services Design System. While the page structure and components closely match this.



Tempate A (left) / Template B (Right)

Directories / MyArea

Directories allow the creation of repositories for content and structured data via a simple, non-technical user interface. Complete with Maps integration, entries in a directory can be searched against various criteria, including geographical location. Administrators can create and maintain structured data sets within a customisable field structure. Directories can include location data presented to website visitors; interactive map (Google Maps or a preferred alternative) providing an In My Area localised; and links, email addresses, and formatted text.

Data within Directories can be used in several ways. Website visitors can search and browse Directories information – searching by keyword or postcode and viewing search results on a map, browsing A-Z lists of Directory entries, and viewing individual Directory entry listings, including location information via an interactive map.

Directories can have their own category structure, which, if used, will provide navigation options for website users browsing Directory listings. Directories are also tagged against the main website navigation structure, meaning that users can be signposted to relevant Directories from elsewhere in website content, using dynamic, self-maintaining links.

Additionally, directories' content can use syndicated data via API sources such as the council's GIS or structured data sets from third parties.

Elastic Search

Elastic Search provides a straightforward method to enhance your website with rich, relevant search capabilities. This search integration includes all the necessary built-in features to design premium search experiences, such as intuitive relevance tuning and comprehensive search analytics. These tools help you optimise the content you present to your users.

Search activity offers valuable insights into web visitors' needs and preferences, enabling customer experience managers to understand visitor motivations and identify both content opportunities and gaps.

Local government websites increasingly use human-centred design, prioritising shortcuts to services related to key life events and frequently accessed topics. However, when websites present an overload of information, the search bar often becomes the primary resource for users. Elastic Search not only speeds up query processing but also enhances core search capabilities to help end-users find the information they need effectively:

- **Natural Language Processing:** Utilises pre-trained models powered by machine learning for applications such as text classification, sentiment analysis, and named entity recognition. This technology forms the basis for semantic search, which understands user intent beyond mere keywords.
- **Adaptive Relevance**: Offers automated suggestions for promoting content that aligns with what users are searching for.
- **Synonyms:** Helps direct users to appropriate content by establishing associations between commonly used search terms.
- **Relevance Tuning:** Allows for the adjustment of search relevance through methods such as weights and boosts, which promote impactful content and enhance conversion rates.

Optional Features

Website Personalisation with PreVu

Every visitor to your website arrives for a different reason: to report a missed bin collection, make a payment, or find local car parks. Each visitor is unique—some may be from out of town, speak a foreign language, or frequently visit your site for updates on planning applications.

Typically, council websites are relatively static. Content and 'top tasks' are manually curated based on analytics, and carousels are used in an attempt to showcase more content on a page, which may complicate the user's search for relevant information.

Sites need to be smarter to help users find what they seek more efficiently. Being smart involves utilising all available data about a user's visit to personalise their experience. We can gather extensive information during a user's visit: their location, whether they are stationary or travelling, the type of device used (mobile, tablet, or desktop), their preferred language, and their history with the site. We also consider environmental factors like weather conditions, the time of day, and the year.

How it works

We capture various 'signals' about a user. These signals include data we infer without additional input from the user and data provided by users when they sign into the site. Environmental signals that are not user-specific are also considered.

Examples of signals include:

- Location
- Browsing history
- Device type
- Preferred language
- Postcode
- Previously completed forms
- Time of day
- Time of year
- Weather
- Local events

These signals generate 'tags', which distil what each signal indicates—whether the user is local or visiting, using a mobile device, speaks French, or has completed specific forms.

These tags can be applied to various types of content, such as links and images. The whole homepage—or any page—can be personalised by combining signals, tags, and content in the personalisation engine to create a unique, tailored experience for each visitor.

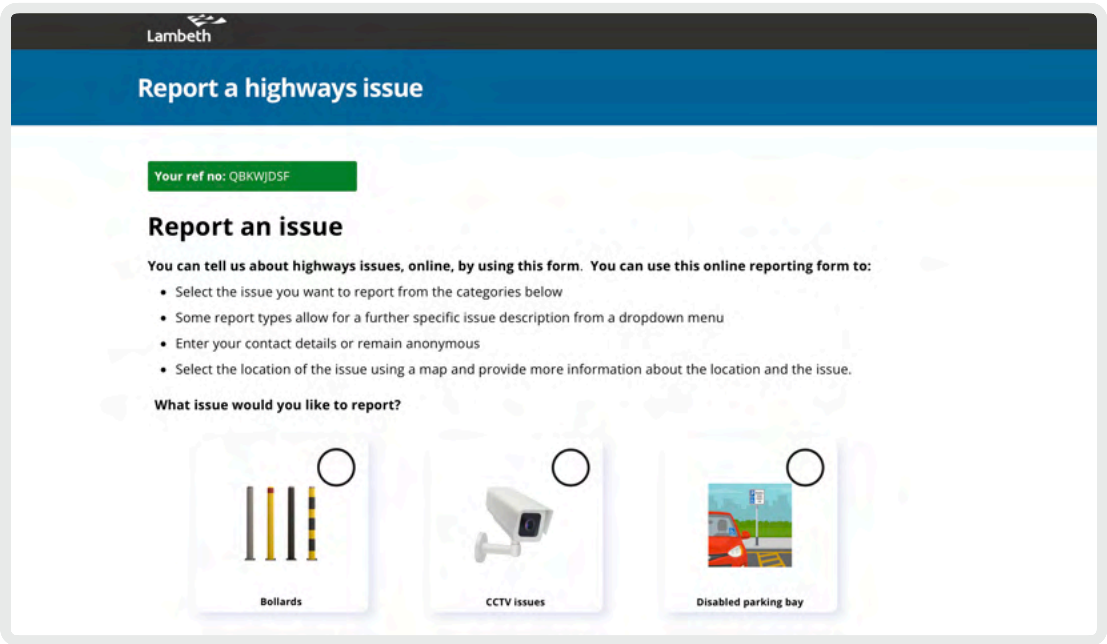
PreVu offers a non-technical, low-code interface that allows you to define rules for each persona type, the signals used, and the content they will see. This enables a dynamic and user-centric approach to website personalisation.

Low code forms

IEG4's Low Code Forms Designer, combined with our Local Government as a Platform (LGaaP) forms, enables council users to build and deploy intelligent online forms rapidly, add custom-built rules, and integrate existing systems including bookings and payments, all without the need for coding. Users gain access to a library of over 1200 forms and can participate in a forms community, allowing for the sharing of created forms among authorities.

Despite varying methods and systems, all councils perform similar functions despite varying slightly. This widespread similarity often leads to inefficiencies, as every council may design or purchase distinct online services. The vision, once proposed by the Government Digital Service (GDS), advocates for a unified approach where local authorities no longer individually design or buy their software services. Instead, these services would be available through a digital 'app store', created by various organisations and shared among numerous local authorities, leading to greater efficiency and cost savings due to economies of scale.

Our platform acts as a significant step forward for local authorities aiming to enhance their digital strategies, whether they are starting or integrating disparate departmental efforts. The shared library not only accelerates digital transformation by providing immediate access to a wide range of forms but also ensures consistency in appearance and functionality. This coherence improves usability for citizens, facilitating a smoother digital transition and enhancing overall service delivery.



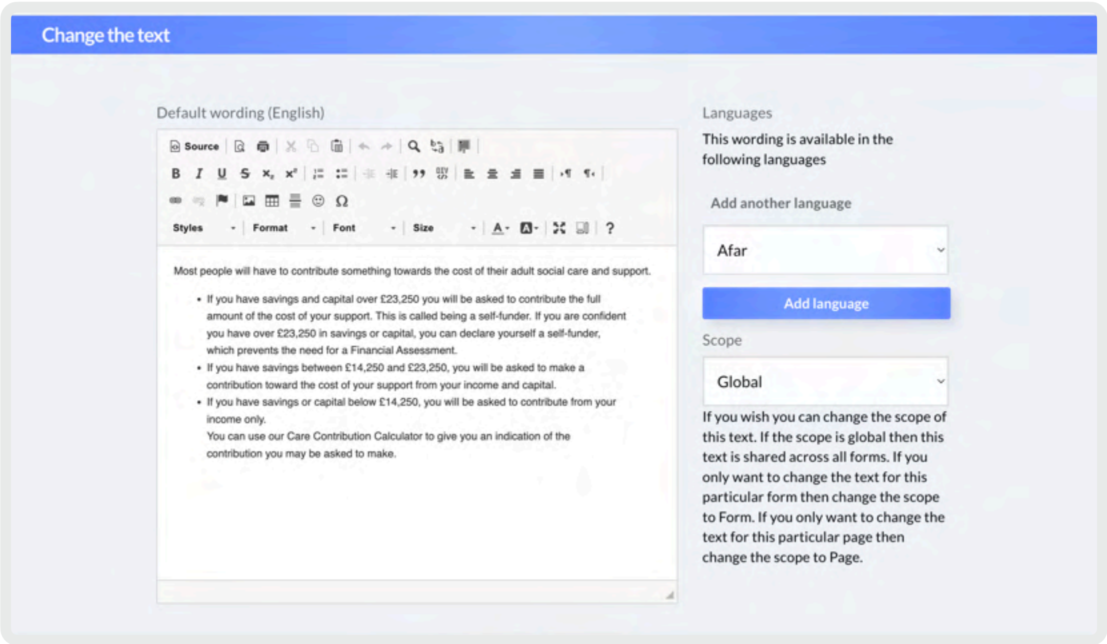
Platform Features

IEG4's Form Designer is an integral component of the digital platform, utilised for the citizen-facing forms. The forms you create will inherit features designed to enhance localisation, flexibility, user experience, and accessibility. The following common forms functionality is available with IEG4's Form Designer:

Inbuilt Content Management

This feature allows you to add and edit:

- Guidance notes
- Question wording and help text associated with questions
- Declaration/privacy statements
- Explanatory text when a person saves or submits their online form
- With this capability, you can quickly and easily make updates to the form without needing assistance from IT or the web team, whenever necessary.



Form content editor

Alternative language support

With the content management functionality, it is also possible to support alternative/additional languages e.g., Welsh.

Email receipts and reminders

Each form has the following functionality in terms of emails. An email is sent to the citizen whenever:

- They have provided an email address and
- They save their form for later or
- They submit their form

It is also possible to set up email reminders. An email reminder will be sent to any citizen that has started but not submitted an online form - after a set number of hours (configurable by the council). The content of the emails can be updated by you and can be added in HTML format to ensure you can adhere to branding/make them mobile-responsive etc.

Mobile-responsive

IEG4's online forms leverage the Bootstrap (open standard) framework to ensure that they are responsive to the device which is being used to access them.

By leveraging this framework and being able to provide custom styling across our forms, it is possible to have compelling, simple-to-use services irrespective of the device a citizen is using.

Accessibility

WCAG 2.2 support is built-in, with users able to navigate forms using keyboards / speech-enabled assistance technologies.

The online forms provide high contrast options as well as native support for increasing their preferred font sizing.

Form retrieval security options

IEG4's forms enable citizens to save their form and access them later. When they do this, the citizen is provided with a reference number to use to return to their form. The reference number is generated at random and, by default, is eight characters long comprised of consonants. However, it is possible to:

a) Add a prefix / suffix to this e.g. FORMS-DYNGMSKW
b) Make it as long as desired e.g. changing it to 12 characters DYNGMSKWYNFG
c) Make it numeric e.g. 3040340304
d) Change the characters to be whatever you want i.e. if you can change the default use of consonants instead use: abcdeABCDEFGHIJKLMNOPQRS1234567890!@£$%^&*()_+|~

A resulting reference from this could therefore be: 4~£DSS39@. So, the flexibility is enormous. Additionally, we provide support for you to add additional security and DDOS prevention measures through the following features.

Security Questions additional to the reference

When retrieving a saved form, by default, the citizen will only need the reference number they were provided with. This is the default behaviour because:

- forms tend to be completed in one go and with only a few exceptions across the many
- hundreds of forms, the value/sensitivity of the data is virtually zero to someone and
- we need the right balance of user experience, pragmatism and risk

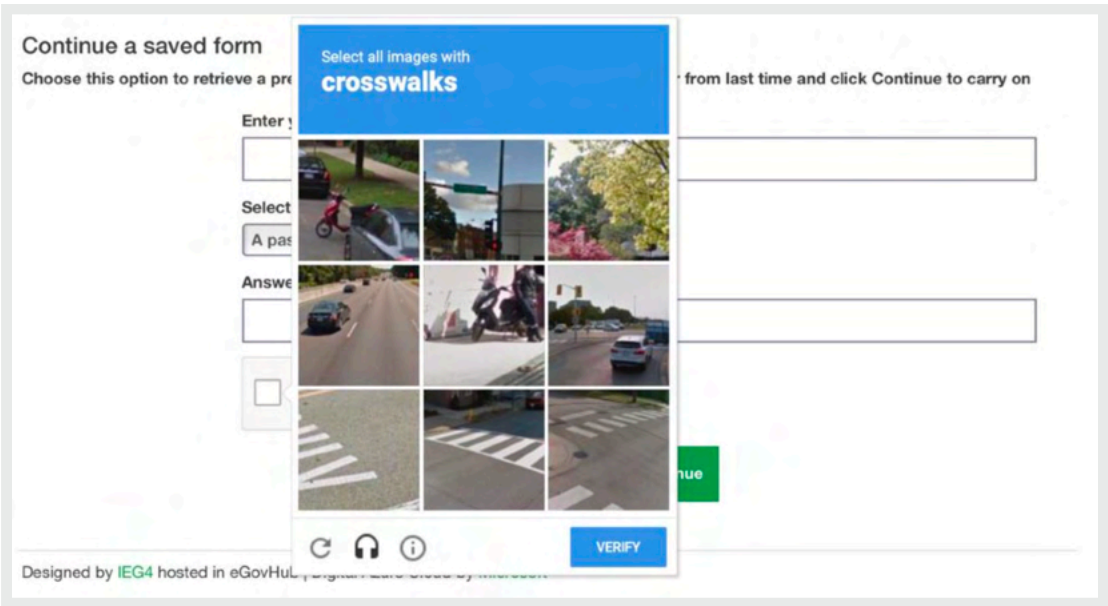
Nevertheless, because some services are longer/more likely to be saved and thus more likely to be data rich, additional form retrieval security options are available. You can enable security questions to be asked additional to the form reference. These include:

- Name of their first school
- Their mother's maiden name
- Their National Insurance Number
- A password of their choice

It is possible for you to set the minimum length of the password of their choice, as well as whether it should include special characters and a mix of upper and lower case letters.

Captcha when trying to retrieve an online form

When enabled a user will see this at the point of attempting to retrieve their form:

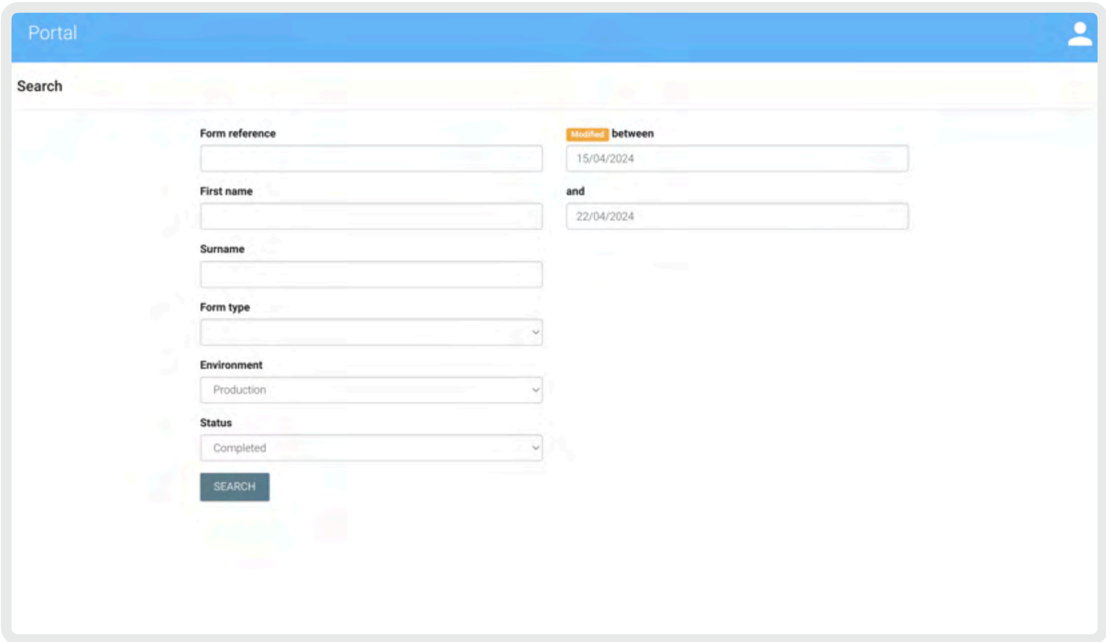


Captcha option

Forms Portal

The Forms Portal provides council officers with the ability to:
Search for forms by:

- Form reference
- First name/surname
- Form type
- The Environment (Development/Test/Production)
- The status (In progress / Live)
- Date range



Forms portal

For ‘In progress’ forms, the portal enables council staff to:

View:

- When a form was started / last accessed
- The citizen’s name and address
- Any ‘save for later’ emails sent
- Any documents that have been uploaded
- How long has been spent on the form so far including how long has been spent on each page of the form
- The browser type, and The IP address the form was accessed from

As well as being able to:

- Open their form exactly where they left it
- Send an email to the citizen (where one was provided in the form), and
- Lock the form so it cannot be completed by the citizen

For ‘Completed’ forms, the portal enables council staff to:

View:

- When a form was started / submitted
- The citizen’s name and address
- Any ‘save for later’ emails and the submission email sent
- A PDF version of the completed form
- Any files created to send to the back-office (XML/JSON/CSV files where applicable)
- The outcome of integrations, including being able to see the response provided from the back-office application API where appropriate

- Any documents that have been uploaded
- How long the form took to complete including how long has been spent on each page of the form
- The browser type, and The IP address the form was accessed from.

As well as being able to:

- Send an email to the citizen (where one was provided in the form)
- Re-process an integration

Secure Access

Access to the Forms Portal is limited by user permissions and it is possible for users to be able to be limited to a subset of forms that they can search for/view within the forms portal e.g. where many forms spanning many departments are in use.

Plus, it is possible to enable two-factor authentication to add further security. This can be provided via the following:

- Microsoft Authenticator
- Google Authenticate
- Authy

No code integration with IEG4's Portal and Website CMS

As part of our platform is the the self-service customer account which seamlessly integrates to all forms you build. Where a council has either our Portal or CMS, forms built:

- Can be discovered by citizens within their account simply by the council setting it to visible
- Can be searched for using key words that you can link (without technical help) to the form e.g.
- "dumped mattress" could be linked to a fly tipping form or "change in wages" to a benefit change in circumstances form.
- Will be pre-populated with data held in their account profile including:
    - Name
    - Address
    - Email address
    - Mobile phone number

No code integration with the workflow tool

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

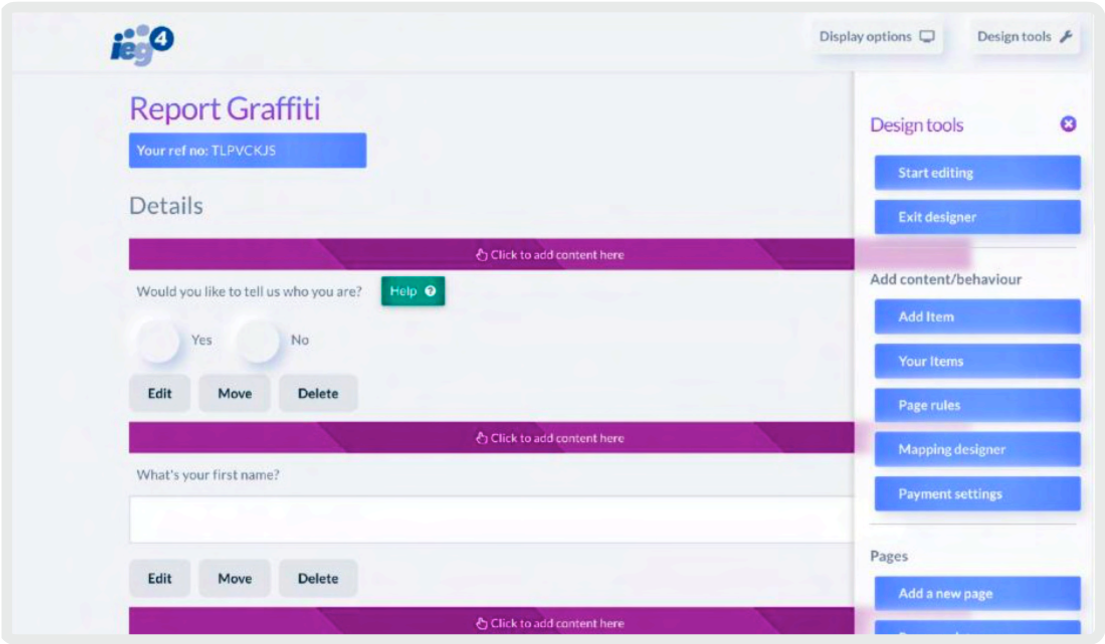
Unlike legacy EDMS/Workflow systems which involve the use of saving things to disk/indexing CSV files, with our workflow tool you can link a form to a process simply by selecting the appropriate process you want to link it to via a drop-down.

Form Design Features

Our simple-to-use form designer functionality is covered below.

Design Tools

The ability to add/edit/remove content and behaviours from forms is controlled by a clean set of options in the 'Design Tools' menu as you can see below:



Design tools

Adding form content

The 'Add Item' option enables you to quickly and easily add content to your online forms. The items available are:

- Smart fields
- Input fields
- Input lists
- Blocks of text
- Sections
- Upload control
- Payment*
- Map*

We will now walk through what each of these enables.

* Payment and Map sections are Optional Features that are separately licensed and covered in detail later.

Smart fields

Smart fields enable users to add questions with answers that have built-in formats to remove the need for council staff to know how to 'code' this intelligent behaviour.

The full list of Smart Fields supported are:

- Date fields
- Email Address
- Numeric Text Fields
- UK Postcodes
- UK Telephone Numbers

Each of these will ensure that the format of the answer corresponds to the expected format for it.

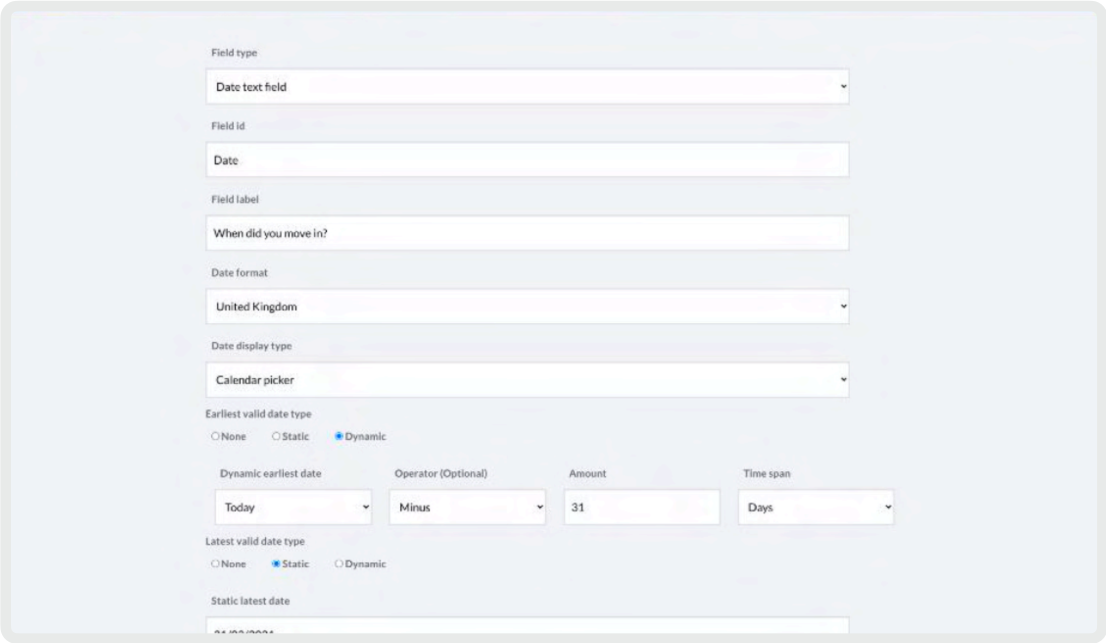
For example, if you wanted to ask for someone's email address you'd select this type, and automatically the question will have built-in validation that corresponds to the rules about the format of an email address:

Smart fields

You can see that when adding a question, a user has the ability to:

- Make it mandatory
- Add a message to present if they don't answer it
- Add a help text button with content
- Show the answer on the output PDF
- Map the content to a key field in Workflow (this will be covered later)

The Date Smart Field has more than just the ability to ensure the format is dd/mm/yyyy. This field type enables a user to set it so that the date field has a pop out calendar for date selection. It also has the ability to add rules on the validity of the earliest/latest date that can be entered.



As one can see, in the above example we've set it such that the earliest date that can be entered is dynamically worked out based upon:

Today's Date > Minus > 31 > Days

And the latest valid date is a static date of the last day of the financial year. So the options enable a council officer to validate the:

- earliest/latest a date can be set based upon
- a dynamically calculated value based upon
    - Today, Yesterday, Tomorrow as the starting point
    - The above plus/minus
    - A number of days/month /years

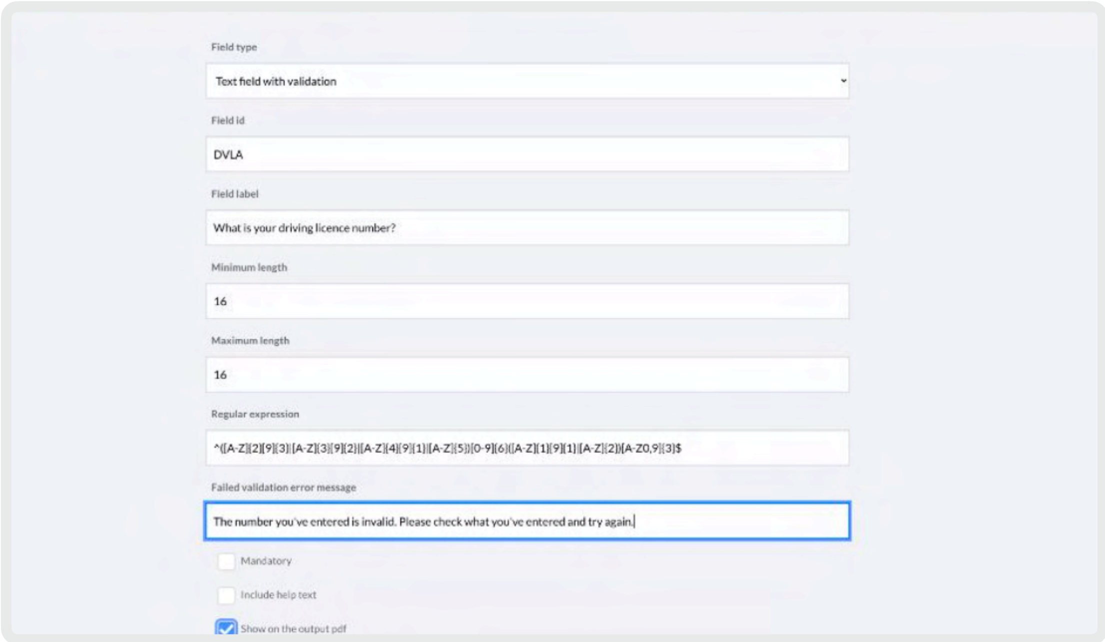
Input fields

These fields enable simple answers to be provided in a single box or a larger text area where the answer could be large (multi-line text field).

Input field types

Text field with validation

This input field type enables you to create your own custom smart fields leveraging both the ability to set a minimum/maximum length as well as regular expressions



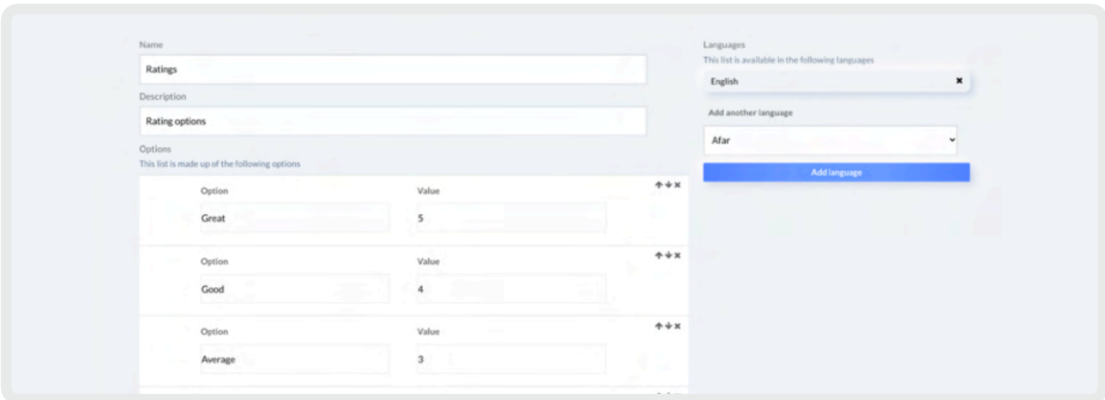
Input validation

Input Lists

This option enables you to create questions which have lists in the following formats:

- drop-down
- radio button
- check box

When a list is saved it is then availabe anywhere else on that form. If it is 'Saved to Your Items' then it will be accessible for all forms.



Input lists

Lists have two elements:

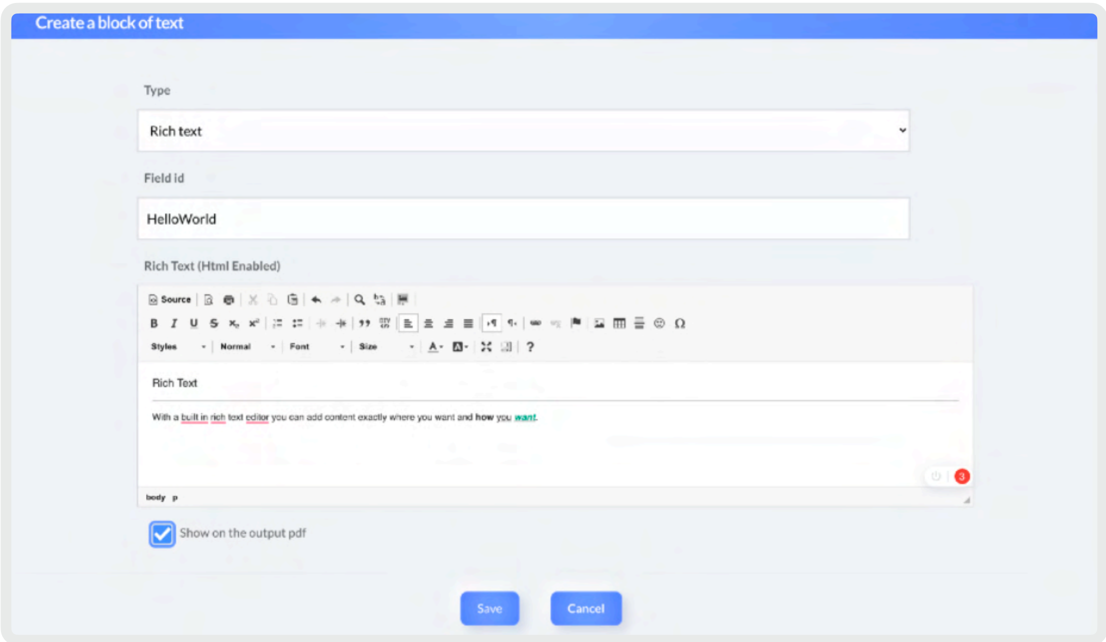
- Option - what the customer sees
- Value - what is used for conditions names and also what is mapped in XML where eMapper is used

Lists can be re-ordered quickly and easily using the action buttons to the right of the option.

The options within lists can be added as HTML and so it is possible to augment the format of these including the ability to add images to make the choice be an image rather than words.

Text Blocks

This option enables you to add in blocks of text wherever you want within a form. It has a rich text editor to enable content to be added in how you like.



Text blocks

This can also be used to add in ‘alerts’ and ‘warnings’ etc. which can then be shown based upon conditions.

With a built-in ‘Source’ option you can also add your own HTML and thus style any content added however you wish.

Sections

Sections provide the following functions:

- Grouped section - a logical section to allow related questions to be shown contextually. A grouped section of questions can be saved to ‘Your Items’ for subsequent use.

- Repeating section - the ability to automatically repeat a set of related questions based upon a number a customer provides. E.g. A group of questions related to a child would be repeated three times if the question: “How many children do you have?” is answered as three.

Sections

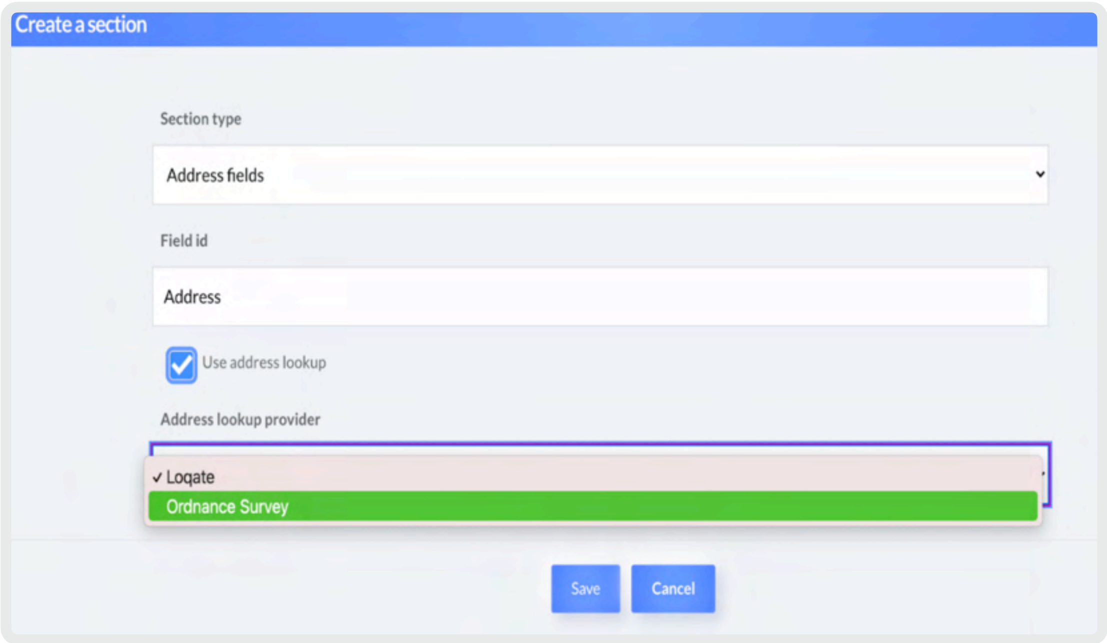
- Grouped section from Your Items - this provides the ability to insert a set of questions that were saved previously. This powerful function means that if you save a section with 30 different questions, it can instantly be recreated. This is useful for council specific pages e.g. with privacy policy/GDPR-related checkboxes, to ensure consistency and ease of repeatability.

Ordnance Survey Address Section

As well as the sections mentioned earlier there is also the ability to add an address section, which provides an address look up powered by the Ordnance Survey Places API:

Overview | Documentation | OS Data Hub

This no code address look up function is fully integrated to these APIs and this enables non-technical staff to add an address look up to all of their forms. To add the address look up is as easy as adding a section and selecting the address selection as below:



The default option, now that it is free to councils is 'Ordnance Survey'. Simply click to save and you've set up an address section, which is capable of integrating with the Ordnance Survey.

Upload Control
Adding an upload control that is capable of capturing supporting evidence from the citizen is as simple as giving it a Field id.

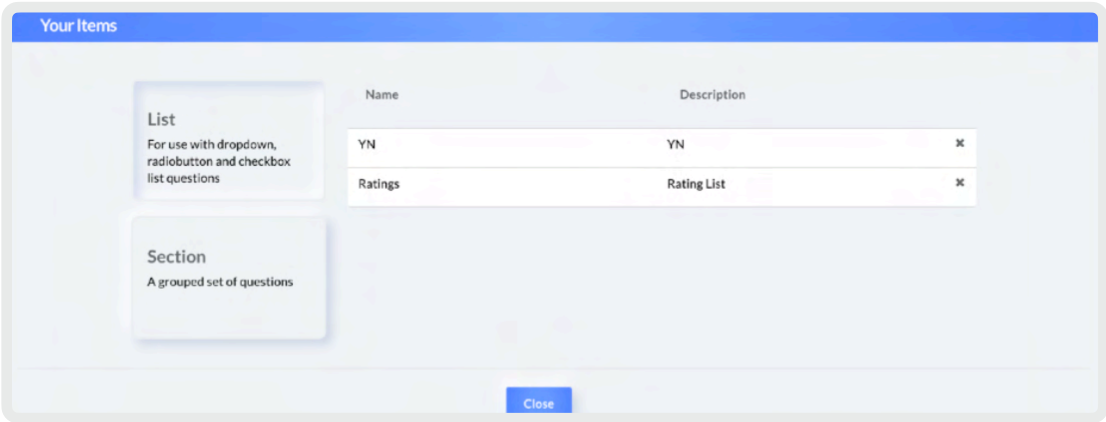
The evidence when uploaded can be:

- Sent to Workflow
- Sent to your EDMS
- Sent to an email address

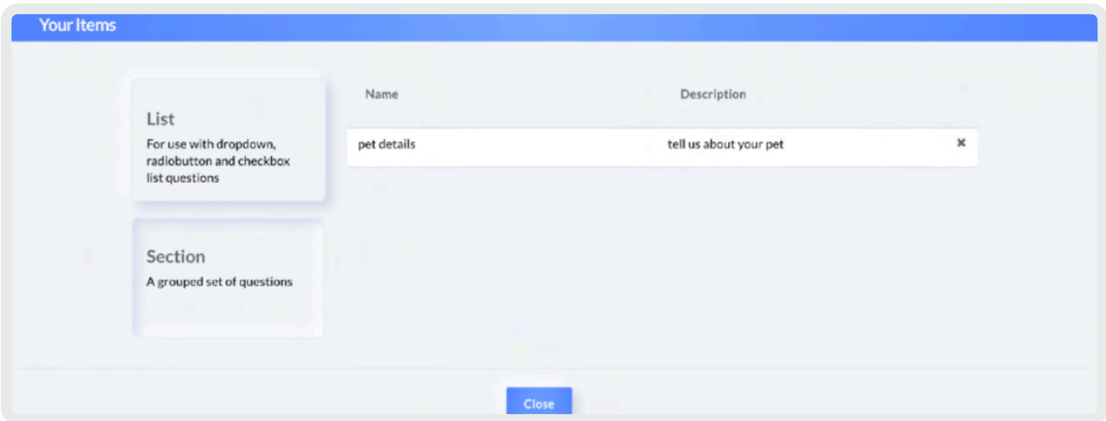
Your Items

When creating lists/sections of questions there is the ability to save these to ‘Your Items’. Your Items is effectively a place to see all shared/reusable content. It is also where one can delete lists/sections, which are no longer required.

Here we see lists that have been saved for future reuse:



As well as a section of questions, which has been saved for future use:



Form Creation options

When a form is created there are options to:

- Use a standard 'Who Are You' page which is a template containing questions about name, address and contact details
- Set the number of pages
- Include/exclude a navigation/progress bar
- Include/exclude a guidance notes page
- Include/exclude a dedicated declaration page

Form Archive

There is the ability to archive a form. If it is archived, it will no longer be visible within the main list of forms. It is possible to see the forms archived and subsequently, to de-archive these too.

Form Clone option

There is the ability to create an identical copy of a form with a single click.

Form Alias option

There is the ability to create a version of a form that has a different URL. The purpose of which is to enable the form to be passed to third parties/internal staff and thus be able to report upon usage by the different form URLs.

Form Publishing and Audit

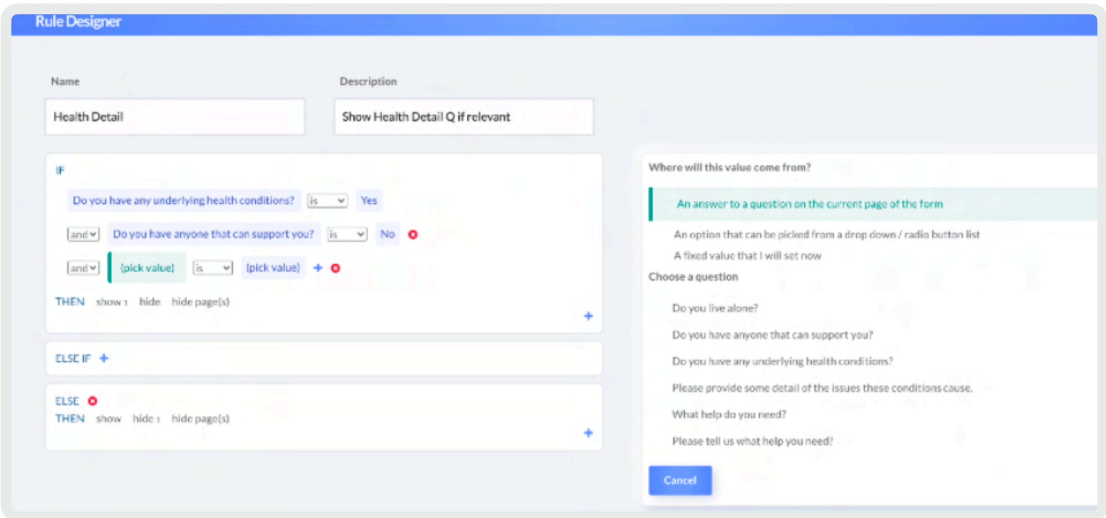
There is a simple click-to-publish content between the development and test environments as well as the test and production (live environments). When publishes are carried out, a log of this is recorded including which user carried out the publish and why.

Adding Rules (Conditional Behaviours)

The forms designer comes with the ability to quickly and easily add conditional logic to your forms. The rule designer is simple and intuitive where a user can:

- Give the rule a name
- Add multiple conditions that can use AND/OR logic
- Add a condition based upon:
    - An answer to a question
    - An option that can be selected from a drop-down list
    - A value entered by the user
    - A fixed value
- Indicate the question, who's answer should be used, in each condition of the rule
- Support behaviour where none of the conditions are met i.e. the 'ELSE' option.
- Show content based upon the conditions of a rule being met
- Hide content based upon the conditions of a rule being met
- Hide entire pages based upon the conditions of a rule being met

An example where a user is setting the answers to multiple questions in conjunction with one another will mean certain content is shown/hidden. Here we can see the ability to use 'and' conditions.



Creating rules

Reporting Functionality

The forms tool comes with standard Power BI enabled reporting with the ability to see the number of forms by:

- type received
- status (complete/in progress)
- month

It has the ability to export the chart and the table's data into Excel.

No Code - Payment Integration

Within the 'Add Items' menu there is a dedicated payment area which provides powerful integration to payment systems with zero technical expertise required. The three options available to add:

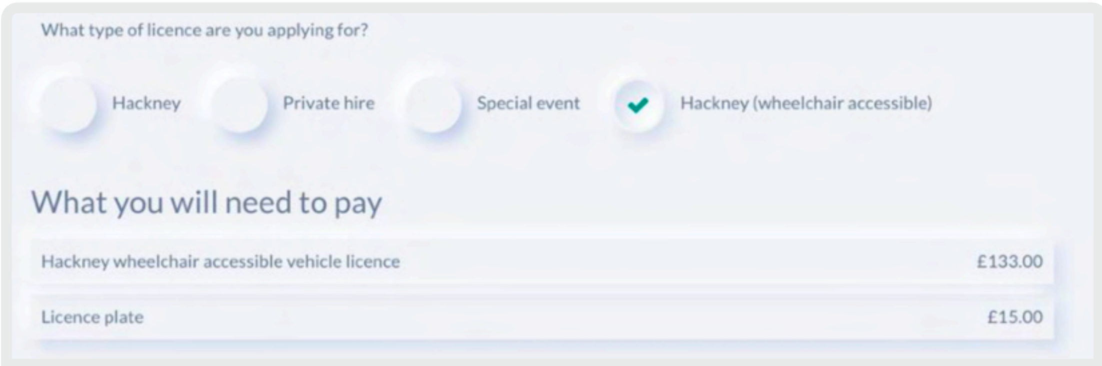
- A purchasable item with a set price
- A user-defined payment amount
- A purchase summary (shopping basket)

Purchasable (Fixed price) Item

A purchasable item is where there is a fixed cost for something.

The user simply provides the amount, the description and relevant codes for the payment system. This function also supports the ability to separately record VAT and pass this to payment systems which support this.

Using the purchasable item function in conjunction with conditional rules means that it is possible to have multiple different payment items and show/hide those relevant to the circumstance only.
For example, below is the same form but different payment items being shown based upon the licence type selected:



Fixed price items

User-defined Payment Amount

This option is for where you want to allow the citizen to pay any amount they wish. This is useful for taking payments for things like Council Tax, Housing Rent, Parking Fines etc.

This option can also be used in conjunction with page rules to enable the capture of multiple payments in a single form.

Payment Summary (Shopping Basket)

The purpose of the payment summary is to summarise all payment items/amounts that have been entered before that point in the form. There is no set up other than to give it an ID and place it on a page following where your payment item/amounts are captured. The rest is done automatically. In the example below, three payments were required, and the payment summary was automatically generated.

This functionality also ensures payment information can be passed automatically to the payment engine and includes the total and also the breakdown of the individual elements, including the relevant fund, budget, reference codes for each etc.

Payment System Pre-population (Access PaySuite)

There is functionality to ensure that any of the following can be passed to the payment system:

- PersonTitle
- Firstname
- Surname
- Email
- AddressFieldsAddressLine1
- AddressFieldsAddressLine2
- AddressFieldsAddressLine3
- AddressFieldsAddressLine4
- Postcode

NB - this happens automatically with other payment applications.

Payment System Custom Metadata (GOV.UK Pay)

There is functionality to ensure that council officers can take advantage of the custom metadata capability of GOV.UK Pay. This is described as follows by GOV.UK Pay.

"You can add custom metadata to a new payment. For example, you can add a reference number from your finance or accounting system, so you can reconcile the payment later. You add metadata when you make an API call to create a new payment. Your users cannot see metadata while they're making a payment."

Essentially, as a council, you can pass additional, council-specific content to GOV.UK Pay whenever a payment is made on a form-by-form basis. The following illustrates an example set of five custom metadata fields added to the payment integration for GOV.UK Pay.

Payment systems currently supported

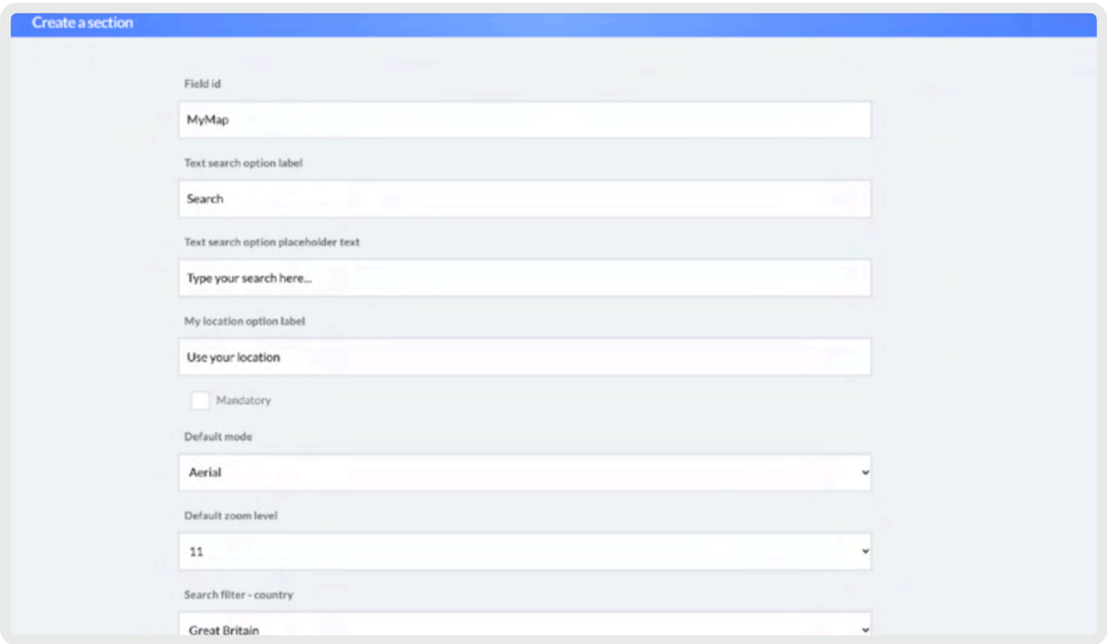
- GOV.UK Pay
- Access PaySuite
- Civica Pay (Paris Payments)
- Civica Pay (eStore2/TSB)
- Civica Pay (Paylink)

No Code - Maps Integration

Our forms also feature rich geolocation-based functionalities. Firstly, it is possible, without any code, to add a Microsoft Bing map to a form to enable a user to capture the location of an incident/issue/defect.

You're able to control:

- The labels on the buttons/functions on the map
- Indicate whether it is mandatory that a location is selected
- Set the default mode i.e., Aerial (Satellite) or Road
- Set the default zoom level upon load
- Set the country for the search context
- Set a default starting longitude and latitude (i.e., the location of the council's town hall etc.)



Maps integration

When a map is added a user is then able to:

- Search for a location with all of the power of the Bing Maps search
- Use their location to find the issue

The map, once viewed in the form, has multiple views for a user to select from.

When a location is captured the geolocation co-ordinates and a link to the specific map location are provided in the resulting PDF output.

Workflow - Geolocation No Code Integration

Where an organisation is using the Map function, it is possible to:

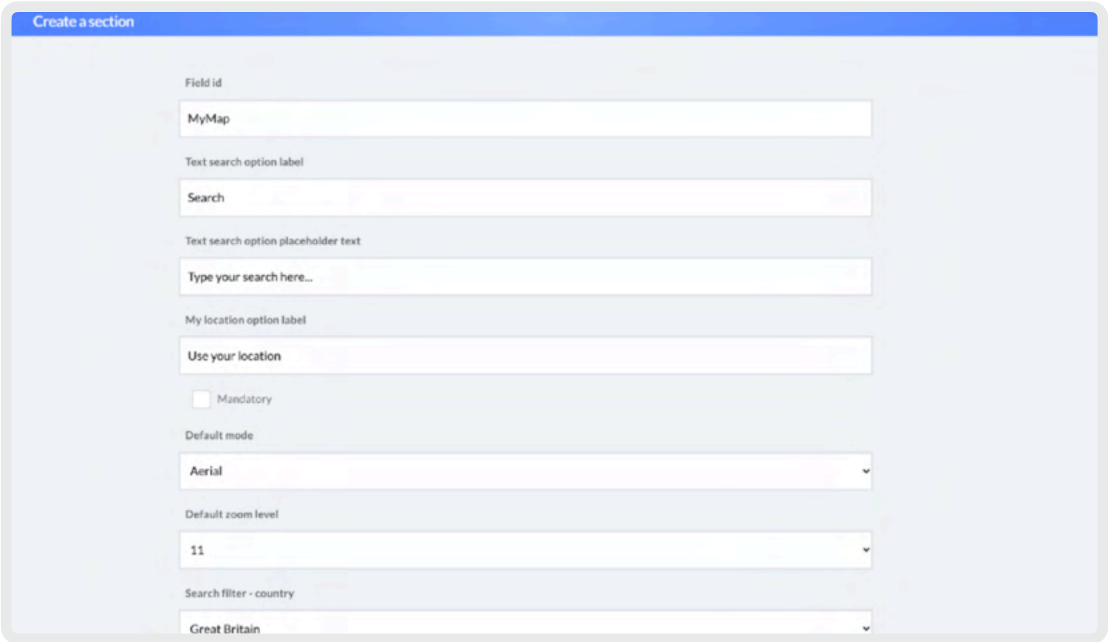
a) automatically create a task/case with the issue's details and geolocation

b) retrieve the details of outstanding processes into the map to prevent users reporting issues that are already known to the council

No Code - Microsoft Bookings Integration

The forms designer allows you to link a form to a calendar that exists in Microsoft Bookings. Different calendars can be used across different forms for different types of services. When the customer completes the form they choose an appointment from a list of available slots.

Once the form is submitted that appointment will be created within the Microsoft Booking system.



Bookings

The summary of the function provided is as follows. The ability:

- to add authentication details in settings to connect to their Microsoft Office 365 Booking account
- for a council officer to select which calendar from the Microsoft Booking service to use in the form
- to show a set of slots for the citizen to select from

Note

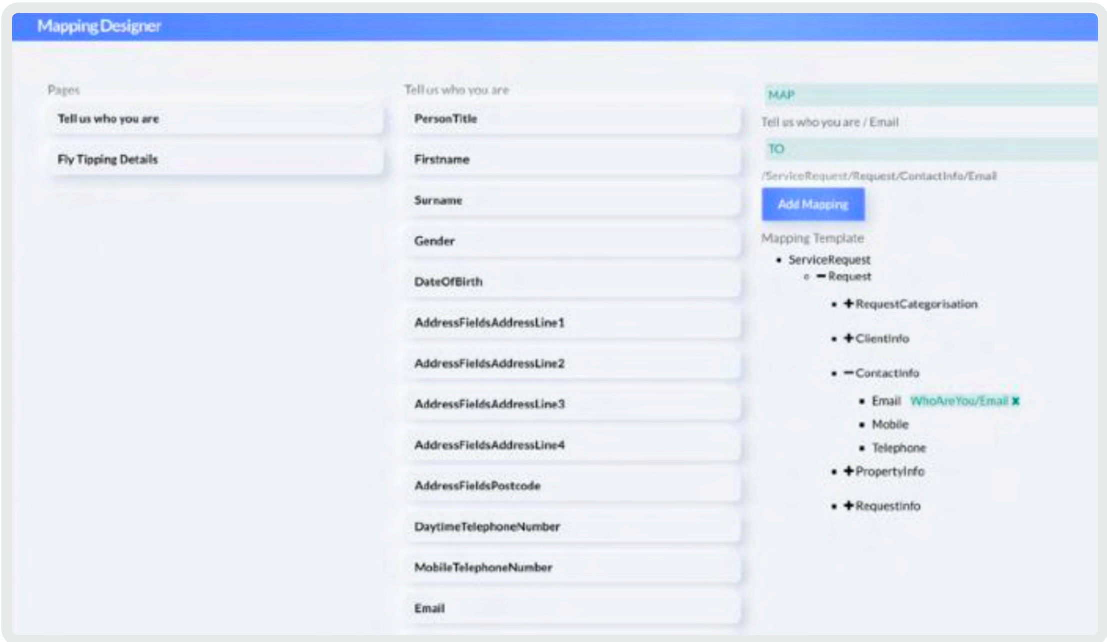
Microsoft Bookings is available as a part of a subscription to Microsoft 365 Business Standard (formerly Office 365 Business Premium) and is the service the above is provided for.

eMapper

This feature enables a council to map content to a specific file format and using Workflow integration capabilities push it to a back-office application.

When online forms are built it is possible to associate XML file mappings with them so that when a form is submitted it outputs a file in a format that a back-office can understand.

Once this has been done a user can, using the Mapping Designer function (eMapper), quickly and easily set which answers from which pages of the form should populate the XML file:



The resulting XML file or files can be automatically saved to a file location for import into other systems or used to populate data warehouses etc. for reporting.

Indeed, there is a Workflow API, where Workflow is also involved, to enable the file to be used for other purposes.

Workflow RESTfulAPI Integration

Where an online form has triggered an associated workflow process it is possible, as part of a single or multiple stage of the process, to trigger a RESTful API call. The benefit of this is that it can be used to enable data captured in a form to be passed to back-office applications automatically.

For example:

1) The Borough Council of King's Lynn and West Norfolk Council use this functionality to automate updates to the IDOX Uniform application and provide automated updates back to the citizen as updates are made in the back-office IDOX application

2) Huntingdonshire District Council (through 3C Digital Services) leverage this functionality to automate updates to the back-office Yotta Alloy system for any type of streets and/or grounds issues

This is possible because, as part of the processes, it is possible to have a step in a process, which is capable of invoking a RESTful API. A user can add these as a part of a process. What this means is that a user is able to take content from an online form and post to a back-office/middleware API.

The RESTful API step functionality is used in conjunction with:

- eMapper
- Workflow APIs

Pre-built forms

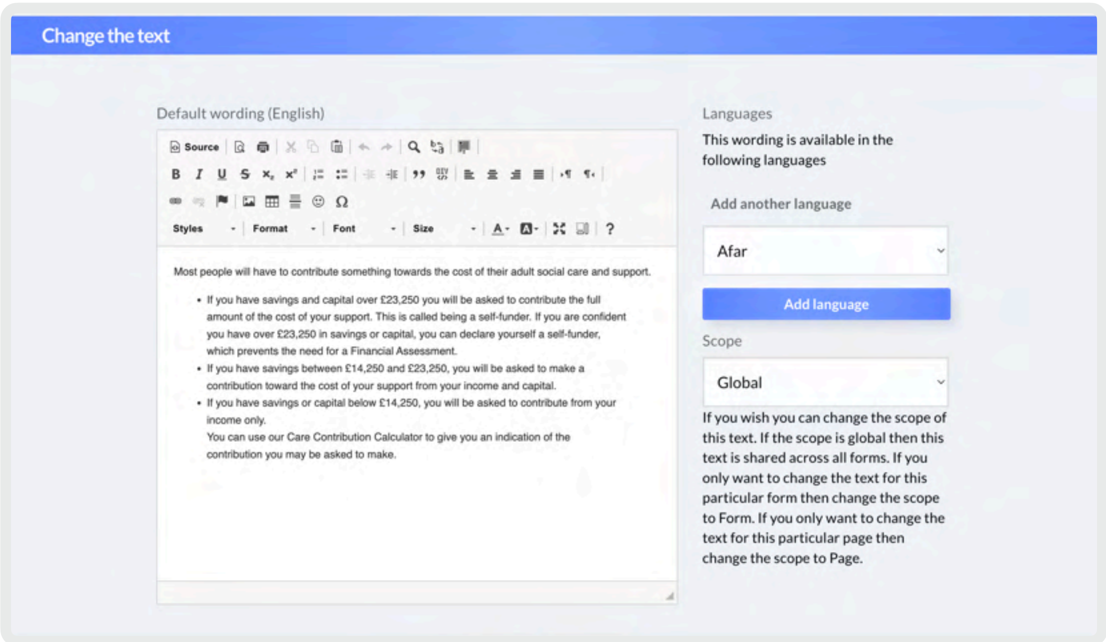
To enhance our low-code forms platform, we offer a range of prebuilt forms tailored to handle many high-volume transactions and services provided by local authorities. These include key areas such as Benefits & Welfare, Council Tax, Waste Management, Licensing, and Social Care. Our forms are designed to seamlessly integrate with numerous common line-of-business systems and leverage APIs to orchestrate processes, achieving near-complete automation. This significantly alleviates the administrative load on back-office staff.

At IEG4, our mission is to facilitate a digital transformation that is both straightforward and effective, regardless of the service complexity. Our prebuilt forms are crafted to deliver intelligent and user-friendly solutions, allowing citizens to efficiently request, report, and apply for services. This empowers councils to expedite their digital transformation journey without the need for extensive technical expertise to develop and integrate these forms. By adopting our prebuilt form solutions, local authorities can enhance service delivery, increase efficiency, and improve user satisfaction.

As with our local code forms platform, users are able to edit form content including:

- Guidance notes
- Question wording and help text associated with questions
- Declaration/privacy statements
- Explanatory text when a person saves or submits their online form

With this capability, you can quickly and easily update a form without needing help from IT or the web team, as and when required.



Our prebuilt forms can also be deloyed via the IEG4 Customer Portal, Website CMS or directly to your exsiting website and be linked to our workflow engine to enable efficient and automated service request processing.

Benefits/Welfare forms

IEG4's Benefit services are some of the most intelligent and powerful services delivered to councils. Combining legislative compliance with technical acumen, IEG4's benefit services enable citizens to apply for/ report changes quickly and easily; with the data/content/supporting documentation automatically updated into back-office applications.

eClaim - Housing Benefit & Council Tax Support

IEG4's eClaim enables citizens to apply for help with:

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

With an intuitive and dynamic design, IEG4's eClaim means a citizen's online form scales (becomes smaller or larger) reflective of their circumstances. The number of pages is kept to a minimum as a result. Equally, where a person's circumstances are complex, the form expands in scale to handle this.

To ensure data is always provided accurately there is validation on fields that will clearly show where an issue lies. E.g. a National Insurance number entered incorrectly. Help can be added/edited/accessed with buttons able to be added against every single question.

The eClaim is designed to ask questions contextually, maximise digital usage and welfare uptake. So, where a child is added it is possible to add expenses like childcare costs as well as to apply for Free School Meals where the person meets the relevant qualifying criteria.

Local Council Tax Support (LCTS)

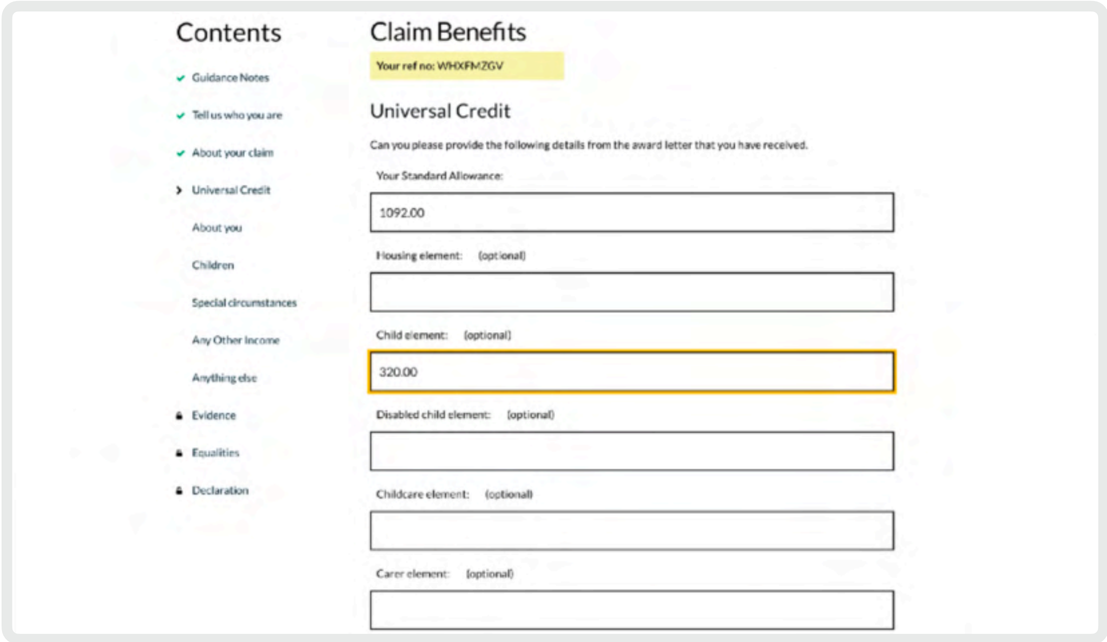
To ensure that the eClaim adapts to your local council tax support scheme, there are dedicated settings such that you can:

- Ask for proof of MRI (formally Capita)l even where the person is 'passported' because your MRI (formally Capita)l thresholds are below the standard £16,000 level
- Ask whether the person is within a 'vulnerable' group and therefore exempt from the normal working age rules e.g. in receipt of Personal Independence Payment/has a child under five
- Set different maximum periods for backdating

The eClaim also dynamically detects whether the person is of pension age using their date of birth and pension equalisation rules. Therefore, ensuring that working age specific rules for LCTS are complied with.

Universal Credit

To ensure councils could have as much information as possible in circumstances where the person is claiming UC, the eClaim has a dedicated page for Universal Credit. Designed in the exact layout of the UC Award letter, the page captures all the details of the person's UC award meaning the officer can make a better-informed decision on assessment.

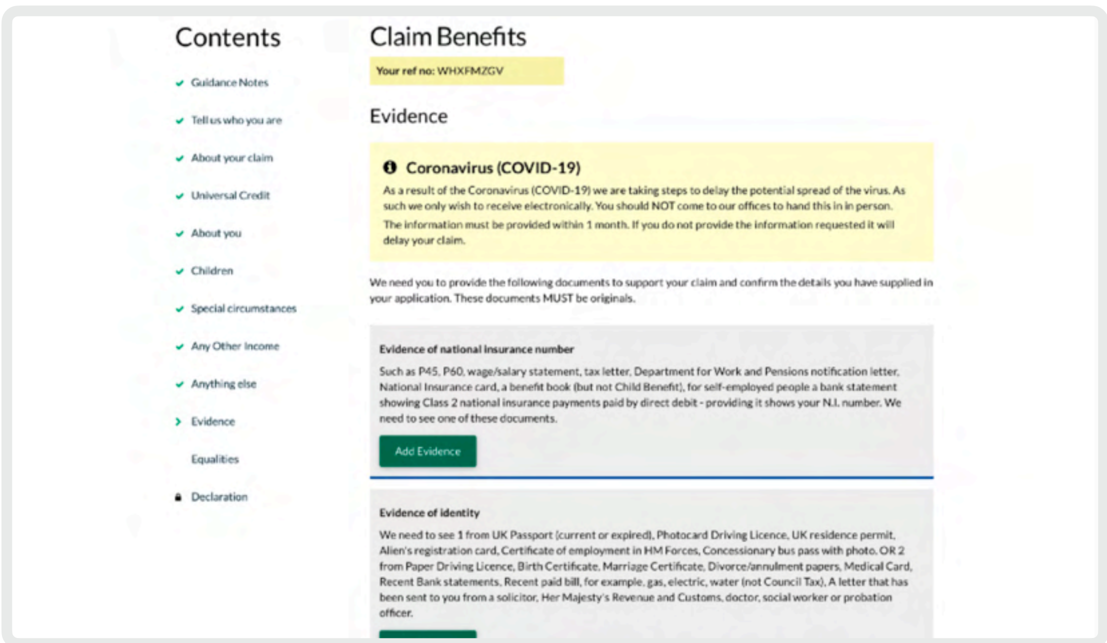


There is also additional dynamic behaviour in the form such that where a person states that they have applied for/or are in receipt of Universal Credit no questions about tenancy, landlord, housing benefit payment are asked for unless the claimant is within an exempt group e.g. Supported Accommodation.

It is also possible, via settings, to request proof of Universal Credit on the evidence page.

Dynamic Evidence

Based upon the circumstances of the citizen, the eClaim will provide the user with the specific items that need to be provided in order to support their application:



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 should anything be 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 set period of time (normally one month) with this information then being passed to the EDMS. You can see below what the user sees upon submission where something remains outstanding.

Note that there is a 'catch all' Upload Supporting Documentation option which is there to cater for ad hoc/ subsequent evidence uploads because the initial documentation uploaded was unsatisfactory.

Calculator

The eClaim comes with a benefit calculator, which is able to act as a standalone function or as a precursor to an application. I.e. it can be optional if the council wishes it to be so. The calculator is able to work out whether a person would be eligible to receive:

- Housing Benefit AND / OR
- Council Tax Support (LCTS) Council Tax Discount (banded scheme) (LCTD)

There is a huge amount of flexibility in how the calculation for LCTS/LCTD is worked out and unlike 'standard' calculators available online, this calculator is designed to calculate LCTS and LCTD precisely in line with your scheme. It has built-in intelligence around:

- Universal Credit to only calculate LCTS unless a person lives in exempt accommodation
- Pension equalisation rules to ensure the appropriate applicable amounts are calculated in real-time
- Social Sector Size criteria (Bedroom Tax) to ensure the appropriate 14/25% reductions are made

Upon completion of the calculator the citizen is provided with a breakdown of their potential eligibility and three options on what to do next.

Namely:

1. Start an online application using the data already provided
2. Do another calculation using the details already provided (i.e. to cater for 'what if' scenarios)
3. Do a new calculation starting from scratch

Self-employed Functionality

Self-employed claims are 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 the fact they can have highly changeable income. Reflective of this, the eClaim 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 eClaim 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 functionality 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 claim/change using Fast Track, the service is able to dynamically inform the EDMS application:

1. That the application/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 claim/change or not

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:

- MRI (Previously MRI (formally Capita))
- Civica
- NEC (NEC)

EDMS Integration

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

- 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.

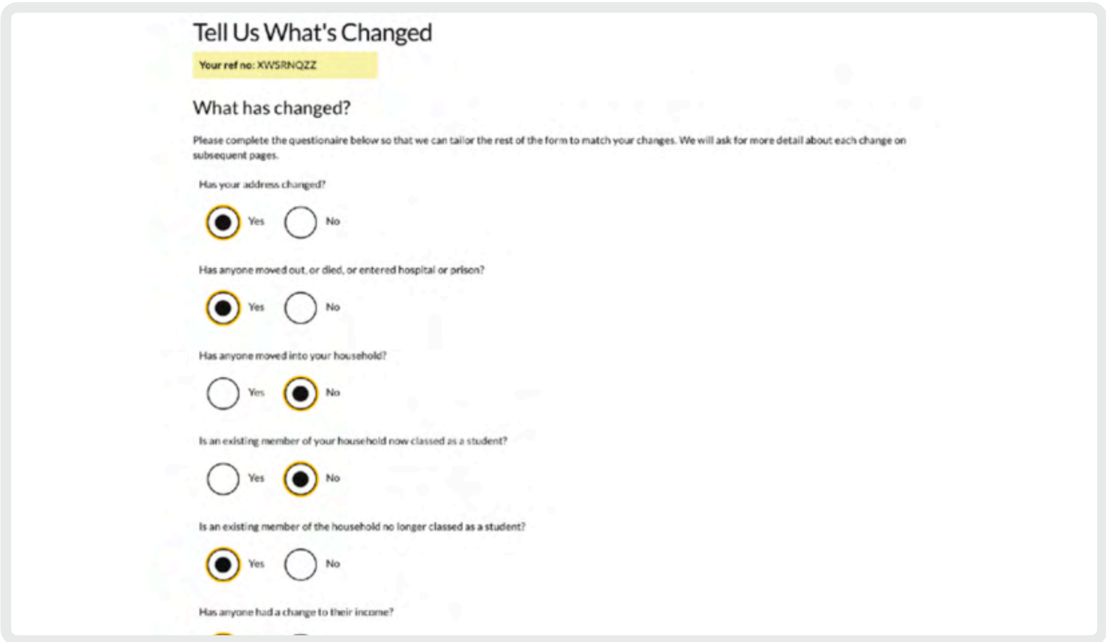
Average page duration analysis

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 MRI, Civica, NEC (NEC) 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 MRI
- 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:

- MRI (previously MRI (formally Capita))
- Civica
- NEC (NEC)

EDMS Integration

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

- 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:

- MRI (formally Capita)
- Civica
- NEC (NEC)

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:

- 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 NEC and MRI (formally 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. NEC has more APIs than MRI (formally Capita), and the ability to transfer a credit from one account to another is not possible with the MRI (formally 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:

- 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. NEC has more APIs than MRI (formally Capita), and the ability to transfer a credit from one account to another is not possible with the MRI (formally 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:

- 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. NEC has more APIs than MRI (formally Capita), and the ability to transfer a credit from one account to another is not possible with the MRI (formally 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:

- 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

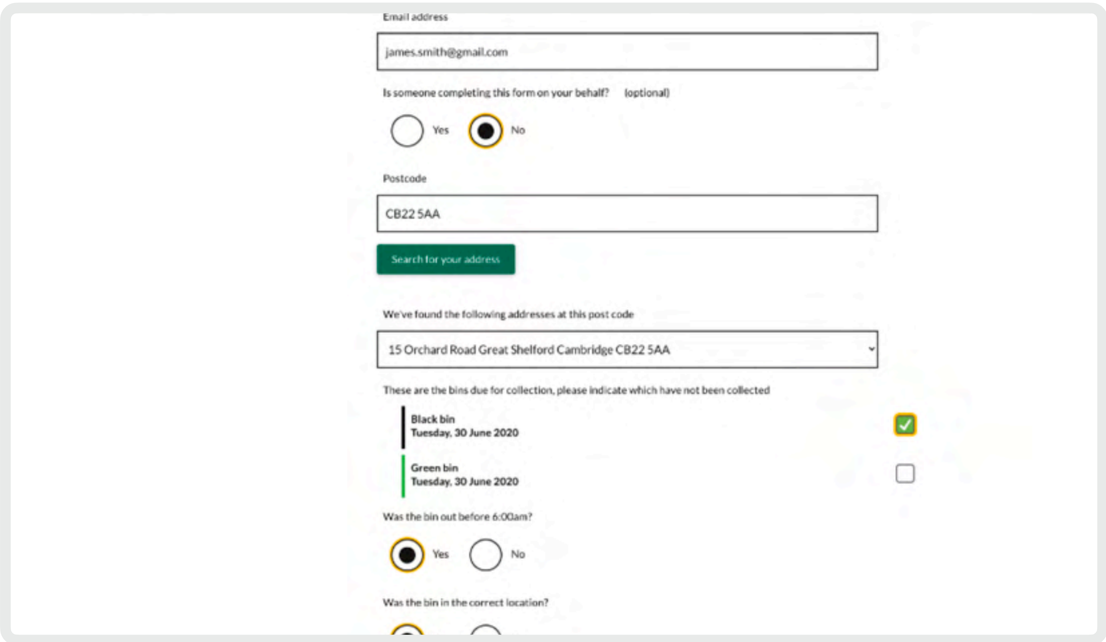
- Moves, Reliefs and Pay
- Business Rates Direct Debit
- Rates Relief

Bins and Waste forms

The following functionality is available for all of the online forms provided by IEG4.

Missed Bin Reporting

IEG4's online missed reporting service provides a highly compelling, powerful user experience powered by intelligent integration to the waste management system. The missed bin form is highly integrated to the waste and in cab technologies so that the service can be delivered as a single page form:



Key Functionality

The following functionality is provided by the form:

- Address look up
- Retrieval of the current collection schedule and which bins are due for collection
  - Highlights no collection is due if the citizen is attempting to report a missed bin where none was due
- Checks for the presence of a missed bin job already created to prevent duplication
- Checks whether the property shares a communal bin to enable more intelligent job creation / prevention of duplicates
- Checks whether the street has been marked as inaccessible and,
  - for each reason available in the back-office, displays a user-friendly message specific to that reason
- Checks for events logged against the bins/containers themselves and,
  - for each and every event/issue logged against a bin, it will display a user-friendly message specific to that reason
- Checks whether the property is marked for assisted collection
- Creates the job based upon the bins missed/whether the assisted collection marker is set

Back-office integration

The solution provides integration to:

- Your Waste Management system to:
    - Retrieve the address
    - Find incidents related to bins/the street/block they live at
    - Create the job(s)
- IEG4's Workflow solution to:
    - Enable the citizen to track the progress of the task

Notes:

The Waste Management systems supported are*:

- Yotta Alloy
- Yotta Mayrise
- Whitespace Powersuite
- Bartec Collective

*This functionality is available if IEG4s Workflow engine is separately licensed.

Additional Waste Forms

- Green waste annual subscription
- Request a new/replacement bin
- Bulky Waste Collection

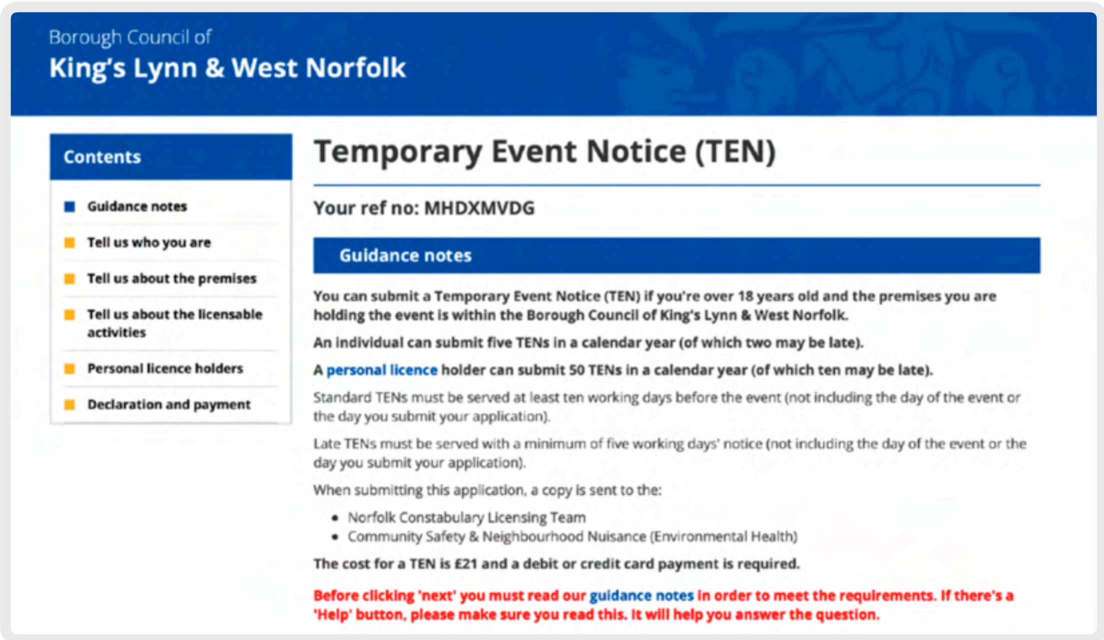
Licensing forms

IEG4 can provide three online licence applications that are able to fully integrate into the IDOX Uniform application. These cover the higher volume temporary event notice application as well as two of the more complex and thus administration time/cost saving taxi licence forms.

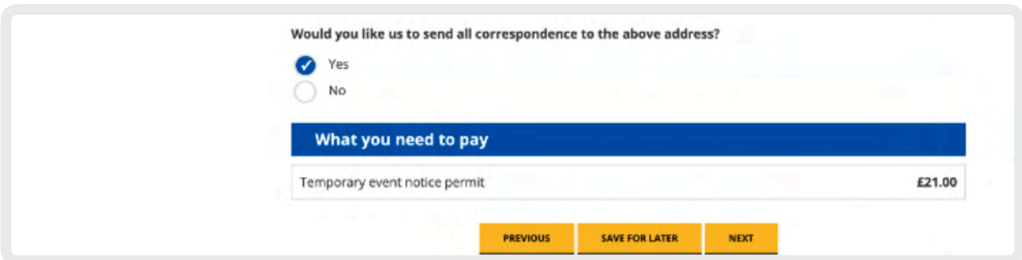
Temporary Event Notice application

Temporary Event Notices (TEN) are needed where a person wants to carry out a 'licensable activity' on unlicensed premises in England or Wales. The process of applying is formally known as 'serving' a Temporary Event Notice. A TEN is also required if a particular licensable activity is not included in the terms of an existing licence. For example, holding a wedding reception at a community centre.

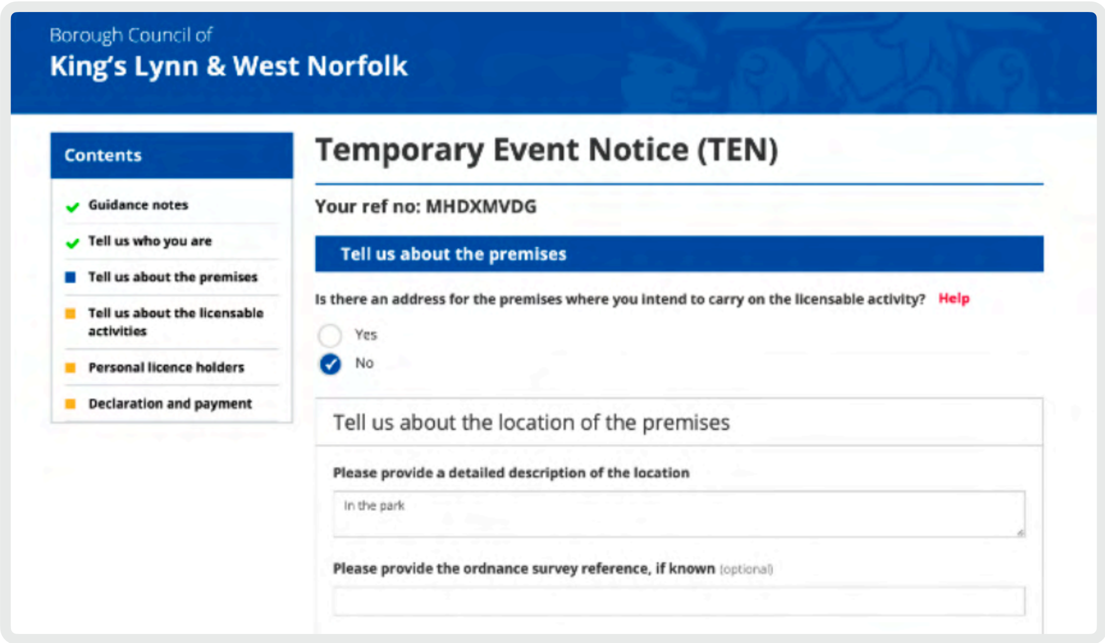
The online form we provide is able to capture all of the necessary information required to enable a TEN to be fully automated into the back-office with a payment being taken too. The guidance notes, like all form wording, is fully editable by the council:



The amount that a council charges is able to be configured, and the citizen can see this immediately after providing their personal details:



The citizen is able to provide full details about the event, the location and are also able to upload a map or photos that help illustrate the location and nature of the premises:



Localisation
Using the built-in edit mode function, you're able to change the guidance notes, question wording and declaration to suit your council.

Back-office integration
The solution is able to integrate seamlessly with these back-office systems:

The Licensing system currently supported is:

- IDOX Uniform

The Payment systems supported are:

- Access PaySuite
- Civica Paris

Notes
- There is a prerequisite that the IDOX Licensing Connector is in place
- To integrate with the payment system, it is a prerequisite that the payment's systems APIs are licensed

Document Management Automation

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

- Information@Work

- Civica W2/360/Comino
- Civica Workflow
- IDOX
- OpenText
- ICLipse
- IEG4 Workflow

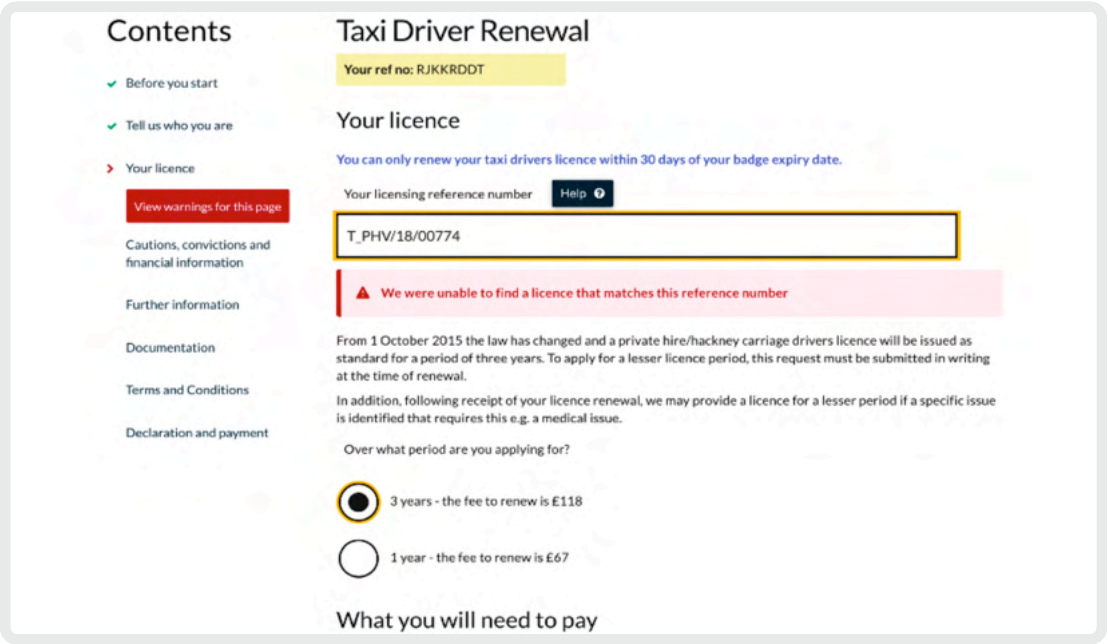
Taxi Driver - Licence Renewal

The Taxi Driver Licence Renewal form is an intelligent online service that enables citizens to complete a licence renewal entirely through the digital channel. This is proving important in a post-pandemic era.

Key functions

- Capture the citizen's personal details e.g. name / address / licence reference number to be able to authenticate them in real-time with the back-office licensing system
- Captures details on cautions, convictions and financial information
- Enables supporting documentation to be uploaded
- Ensures that the citizen agrees to the terms, conditions and declaration
- Captures the full payment at the point of submission to ensure you only need to deal with the renewal when payment has already been received

By being able to authenticate the citizen, we're able to shorten the length of the form and also maximise automation by virtue of being able to link it to the existing case info. Where a match is not found / incorrect data has been entered the citizen is presented with a warning as shown below:



Localisation

Using the built-in edit mode function, you're able to change the guidance notes, question wording and declaration to suit your council.

Back-office integration

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The Licensing system currently supported is:

- IDOX Uniform

The Payment systems supported are:

- Access PaySuite
- Civica Paris

Notes

1. There is a prerequisite that the IDOX Licensing Connector is in place
2. To integrate with the payment system, it is a prerequisite that the payment systems APIs are licensed

Document Management Automation

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

- Information@Work
- Civica W2/360/Comino
- Civica Workflow
- IDOX
- OpenText
- ICLipse
- IEG4 Workflow

Taxi Driver - Vehicle Licence Application

The following functionality is available for all of the online forms provided by IEG4.

Key functions

The Vehicle Licence application is able to provide council specific guidance. As well as being able to capture:

- Who they are, where they live, their contact phone numbers and email address
- Whether there will be additional licence holders
- The type of licence being applied for with support for:
    - for different questions, evidence requirements, pricing breakdowns as appropriate
    - questions for Hackney Wheelchair accessible licence applications
    - questions for private hire regarding their operator where appropriate

Back-office integration

The solution is able to integrate seamlessly with these back-office systems:

The Licensing system currently supported is:

- IDOX Uniform

The Payment systems supported are:

- Access PaySuite
- Civica Paris

Notes

1. There is a prerequisite that the IDOX Licensing Connector is in place
2. To integrate with the payment system, it is a prerequisite that the payment systems APIs are licensed

Document Management Automation

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

- Information@Work
- Civica W2/360/Comino
- Civica Workflow
- IDOX
- OpenText
- ICLipse
- IEG4 Workflow

Taxi Driver - Vehicle Licence Application

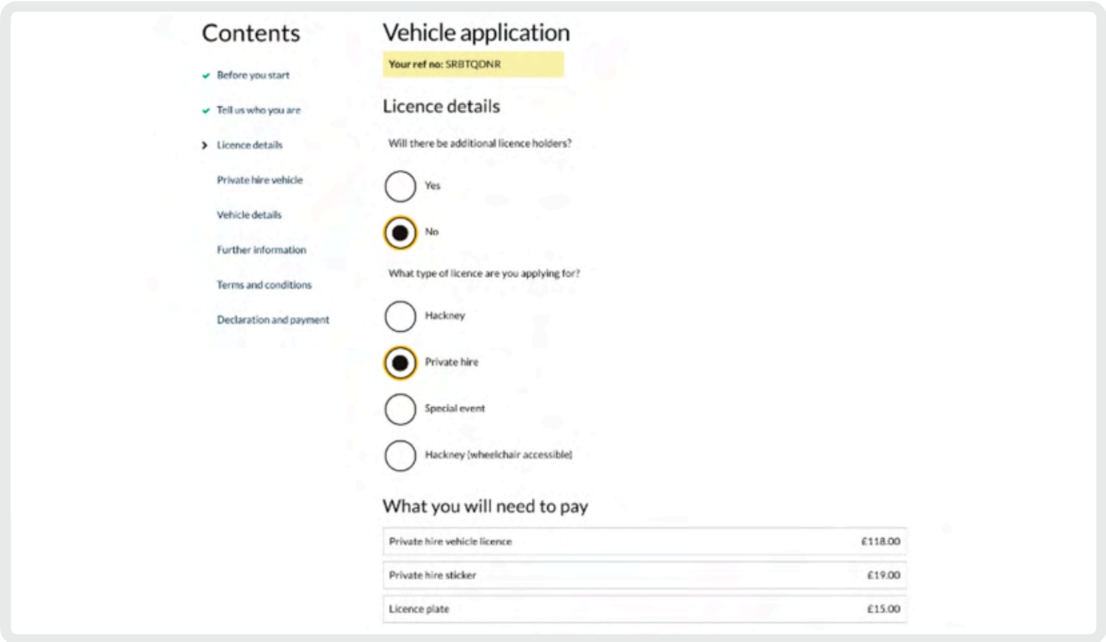
The following functionality is available for all of the online forms provided by IEG4.

Key functions

The Vehicle Licence application is able to provide council specific guidance. As well as being able to capture:

- Who they are, where they live, their contact phone numbers and email address
- Whether there will be additional licence holders
- The type of licence being applied for with support for:
- for different questions, evidence requirements, pricing breakdowns as appropriate.
- questions for Hackney Wheelchair accessible licence applications
- questions for private hire regarding their operator where appropriate
- Details of where vehicles will be stored when not in use (i.e. Hackney Cabs)
- Vehicle details
- Registration date
- Make, model, colour, body type, engine size, mileage, number of seats

- Approved MOT Testing location information
- Fire extinguisher and insurance information



The form is able to integrate directly with the payment system to capture the payment and once the payment is successful fully automate the creation of the case in the licensing application.

Localisation

Using the built-in edit mode function, you're able to change the guidance notes, question wording and declaration to suit your council.

Back-office integration

The solution is able to integrate seamlessly with these back-office systems:

The Licensing system currently supported is:

- IDOX Uniform

The Payment systems supported are:

- Access PaySuite
- Civica Paris

Notes

1. There is a prerequisite that the IDOX Licensing Connector is in place
2. To integrate with the payment system, it is a prerequisite that the payment systems APIs are licensed

Social Care Financial Assessments

IEG4's Social Care Financial Assessment provides an intelligent online form to allow a citizen or any intermediary (e.g. AgeUK, friend, family) to understand how much they may have to contribute to their care costs.

Key Functionality

- Secure council-branded solution embedded into existing website
- Inbuilt Calculator enabling a user to see how much help they might get toward their care costs
- Intelligent form only asks questions relevant to data already input
- Assessment available to download for review
- Save for later functionality
- Simple to navigate - provides a compelling user experience
- Online evidence upload during and after submission

Localisation

Using the built-in edit mode function, you're able to change the guidance notes, question wording and declaration to suit your council.

EDMS Integration

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

- Information@Work
- Civica W2/360/Comino
- Civica Workflow
- IDOX
- OpenText
- ICLipse
- IEG4 Workflow

Local Government as a Platform (LGaaP) Services

As a part of the IEG4 Digital Platform, councils have access to our LGaaP library of over 1200 online services. This 'Council in a box' represents an opportunity for local authorities to make a step change forward with their digital strategies, wherever they are in the journey.

Content within the online forms can be edited using the built-in text editor. This means that question wording, guidance notes and help text will be editable by individual councils to suit their own needs. This includes the ability to support additional languages e.g. Welsh.

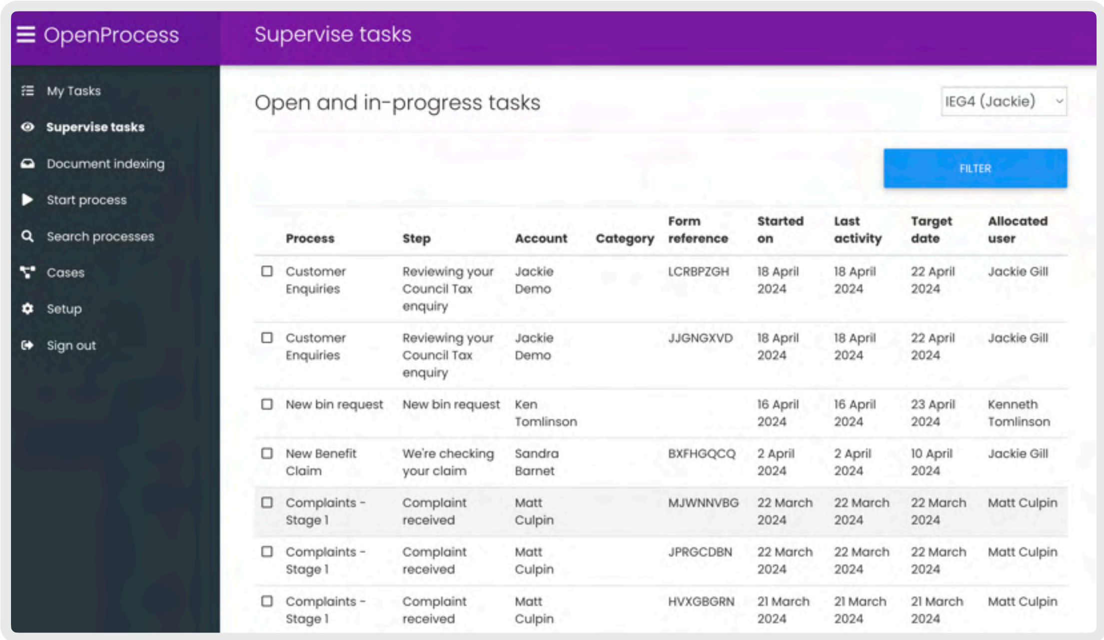
Services/forms are continuously being added to the LGaaP store by customers using the platform and any of the forms in the library can be added to / manipulated too. Forms cover all of the following departments.

Here are some examples:

- Council Tax (e.g. Request a refund/Report a death/Evidence Upload)
- Benefits (Two Homes Payments/Overpayment Arrangement)
- Bins & Waste (Request an Assisted Collection)
- Business Rates (Summons Payment Arrangement/Evidence Upload)
- Environmental Health (Report Fly Tipping/Report Graffiti)
- Housing (Housing Needs Enquiry/Report Housing Disrepair)
- Human Resources (Job Application/Report Absence)
- Licensing (House of Multiple Occupation Licence application)
- Miscellaneous (Parking Waiver Application/Visiting Team Referral)
- Planning / Building Control (Building Control inspection request/Report planning breach)
- Social Care (Report domestic violence)

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’:



Task list

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

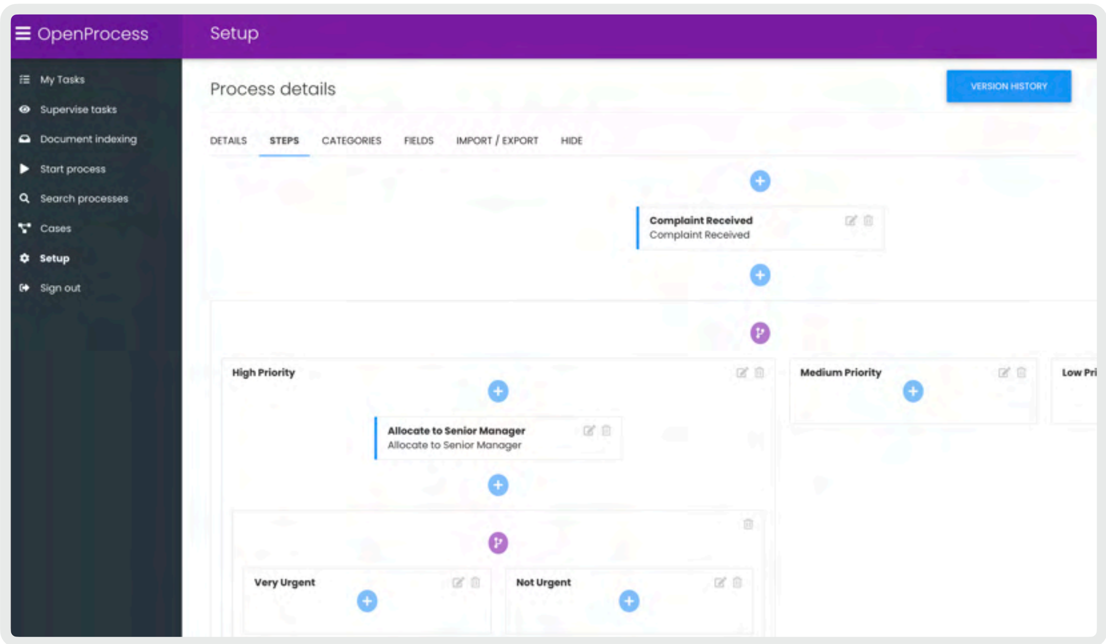
To expand upon the powerful functionality in our workflow tool, this feature means that processes can become vastly more dynamic and intelligent.

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:

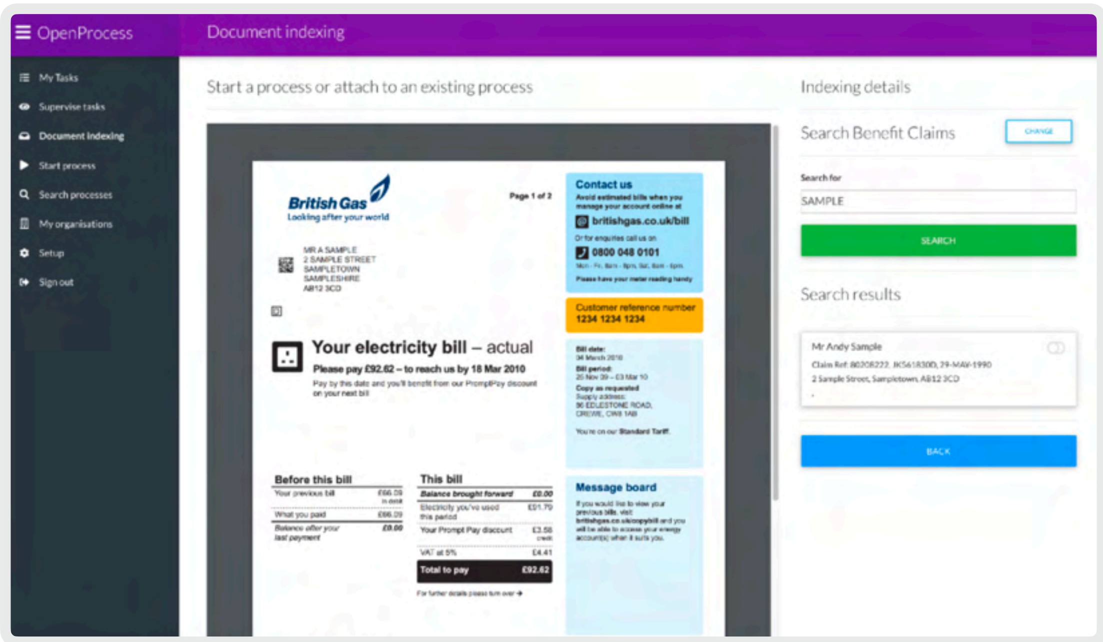
Data Export Items
Process name
Current Step
Account (that the process is associated with)
Category
Reference (I.e. Form Reference)
Started On (Current step start date - Date and Time format)
Last Activity (Current step last modified - Date and Time format)
Target Date (Current step target date - Date 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)

Workflow - Electronic Document Management System

Our workflow tool has already replaced a legacy EDMS application corporately across a council as a direct result of the built-in features that enable it to manage both paper and electronic work/supporting documents in a cohesive fashion. We will walk through the core features available within this functional area.

Document Indexing

- Automated import processes to retrieve scanned documents from a location and import directly into the cloud securely
- The ability to create indexing queues for different teams to enable indexing officers to only see departments/documents they are permitted to
- The ability to create your own datasets for indexing purposes enabling data from all your back-office applications to be set up
- The ability to map out the content of data import files from different back-office applications, including which data should be visible against a process when indexed against a department.
- Microsoft Azure search power is built-in enabling intelligent search results and quick performance
- Real-time API-based indexing with NEC Council Tax



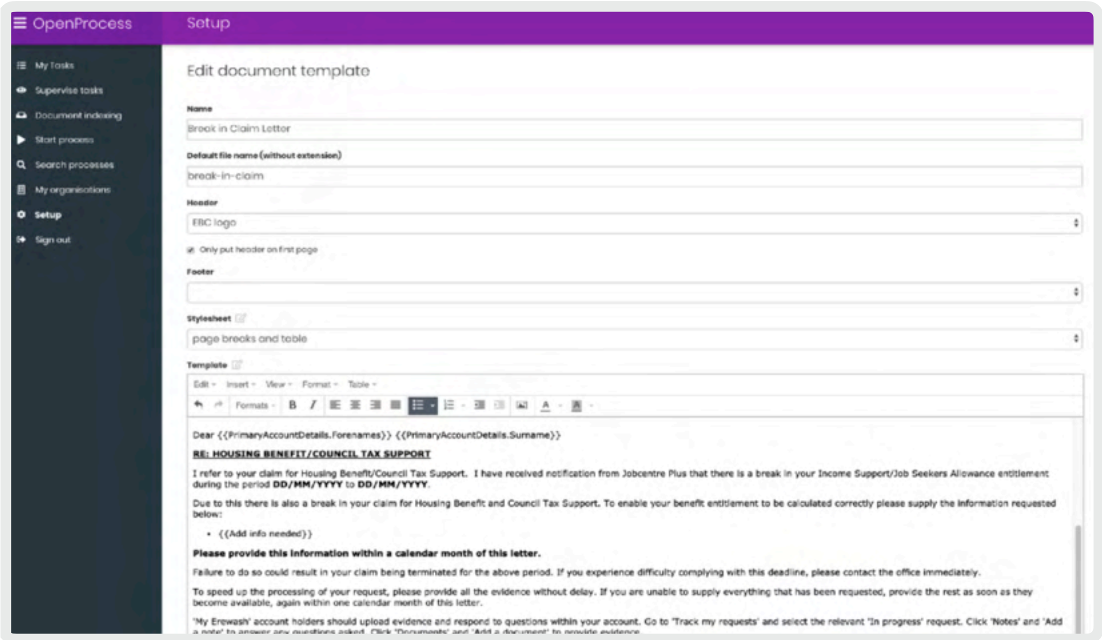
Live document preview to enable simple and effective indexing of documents:

- Ability to start a new process or attach a document to an existing process
- Ability to delete a document incorrectly imported into indexing
- The ability to index a process against multiple back-office data sets. E.g. a process might be linked against Council Tax, Benefits, Housing and Social Care.
- The ability to search and index against IEG4's Customer Accounts
- The ability to see how customers signed up to their customeraccount if they have more than one account

Document Templates

There is a highly powerful built-in template builder and editor within our Workflow tool. These templates can be linked to service area. As processes can also be linked to service areas it is simple to associate specific document templates with specific processes.

There is also the ability to create the content within the main template body:

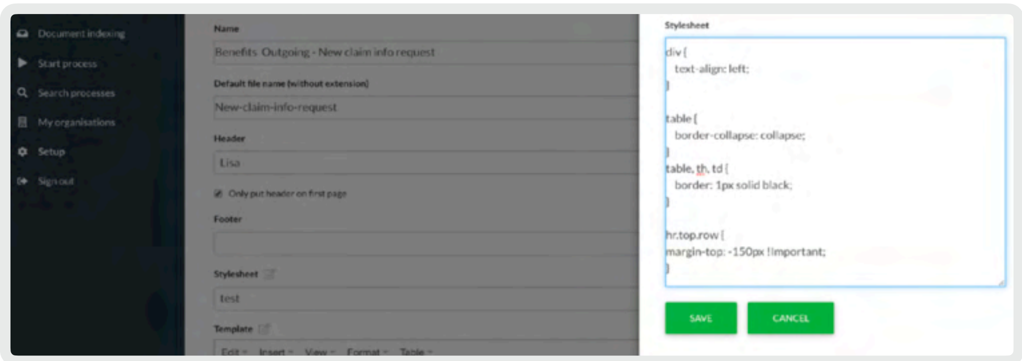


Tempate editor

Plus, to enable improved and more automated template creation there is also 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 letters.

It is possible to create different 'Headers' and 'Footers' to link to these. For example, for different departments of a council.

The Stylesheets function adds an extraordinary amount of power to the branding of your documents. As you can see, the same level of branding as is possible on web pages:



This means that, without any additional software, you are able to create professional templates for issuing to citizens/businesses. When dealing with a process, users can edit the content of templates prior to saving them.

Document Types

To enable the tagging of documents that are attached to processes, there is a built-in document type tagging function.

Like templates, document types are associated with service areas. This means only the document types linked to the same service area as the process being worked on will show. This means you could have hundreds of document types but on any given process only have a few to select from.
It is also possible to associate multiple types with a given document. E.g. A pay slip could act as proof of earnings and ID.

My organisations

This functionality enables councils to add details of organisations that carry out complete tasks/parts of processes on behalf of the council e.g. Housing Repairs/Waste clean-up etc. It is possible to add users/groups of users within these organisations and, in turn, for parts/all of processes to be allocated to the organisation.

Users, Groups and Settings

All settings and configuration are held behind one clear and easy to use 'Set up' screen. Adding users, associating them with groups, and providing them permissions is built into the application and is powerful yet simple and effective. The workflow tool is designed for all departments.

No code integration with other EDMS applications

Our low code forms tool has the ability to:

- automatically save the PDF/supporting evidence provided with an online form you've built directly to a server

and

- do this in a manner that enables the automated import and indexing integration to your back-office and EDMS without code yourselves

This means you can build a form for any purpose i.e. for housing, council tax, benefits, planning, licensing, anything, and be able to:

a) securely 'post' the document from the form to a file location on your network from the cloud
b) rename the files based upon:

the value entered for a particular field in a form
the IEG4 form reference

c) securely save an indexing file that contains data from the form that was completed to enable it to be automatically imported.

APIs & RESTful API Steps

As a reflection of the fact that you need to have development experience to take advantage of the APIs and RESTful API steps, and that not all councils have such resource, these features are optional.

Workflow APIs

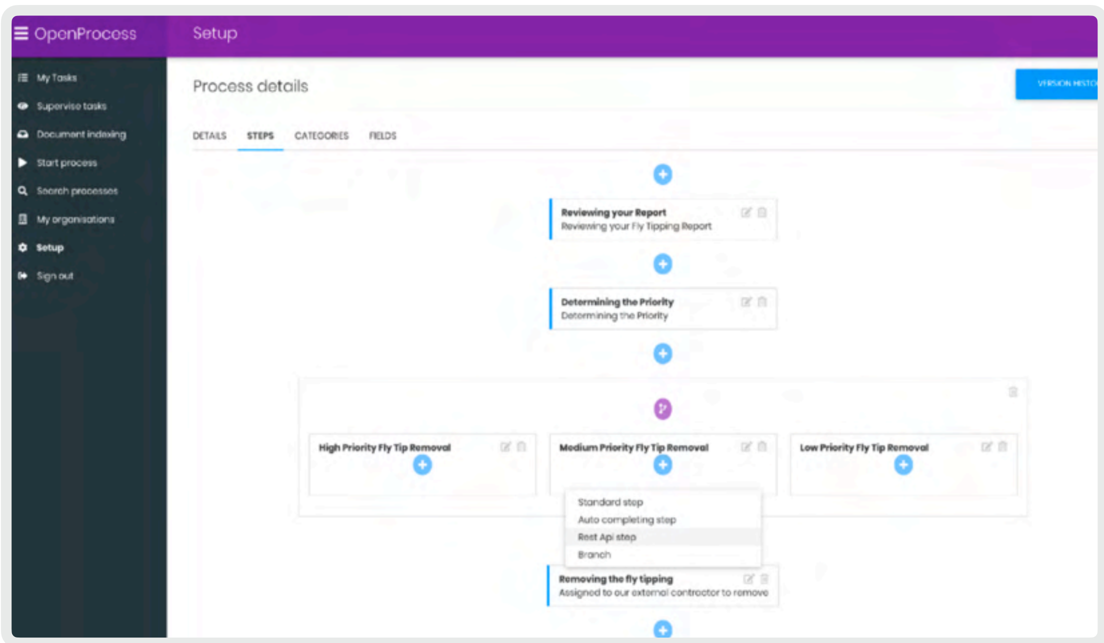
Our workflow tool has RESTful APIs that enable third party applications to:

- Automate the completion of steps in a process (and thus the whole process)
- Automate the addition of notes (both visible/private to citizens where it is being tracked)
- Retrieve the notes associated with a process
- Retrieve the current stage of a process
- Retrieve the documents associated with a process
- Create a process including the ability to pass data fields and documents as a part of the post

The APIs are delivered and can be tested through the best practice-based Swagger UI.

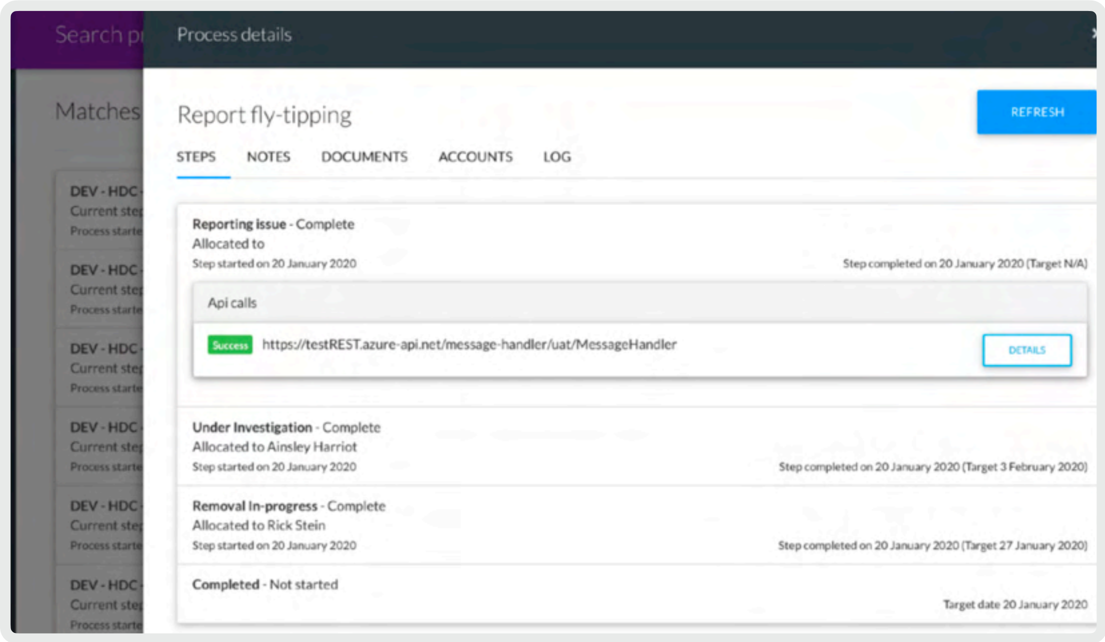
RESTful API Steps

As a part of processes, it is possible to have a step type, which is capable of invoking a RESTful API. A user can add these as a part of a process as shown below:



What this means is that a user can take content from an online form and post to a back-office/middleware API.

When the step is completed, the outcome of the integration can be seen - including the detail of the response:



Notes

1) The Borough Council of King's Lynn and West Norfolk Council use this functionality to automate updates to the IDOX Uniform application and provide automated updates back to the citizen as updates are made in the back-office IDOX application.

2) Huntingdonshire District Council (through 3C Digital Services) leverage this functionality to automate updates to the back-office Yotta Alloy system for any type of streets and/or grounds issues.

3) The RESTful API step functionality is used in conjunction with:

- IEG4's Low code forms
- Forms Mapping Designer
- Workflow APIs

Consequently, these functions require to be licensed.

Customer Relationship Management (CRM)

Councils face significant challenges in managing interactions with the public effectively and efficiently. IEG4's CRM system is pivotal in overcoming these challenges by optimising processes and enhancing the quality of service provided to residents.

Our CRM specifically addresses these needs:

Centralised Information Management

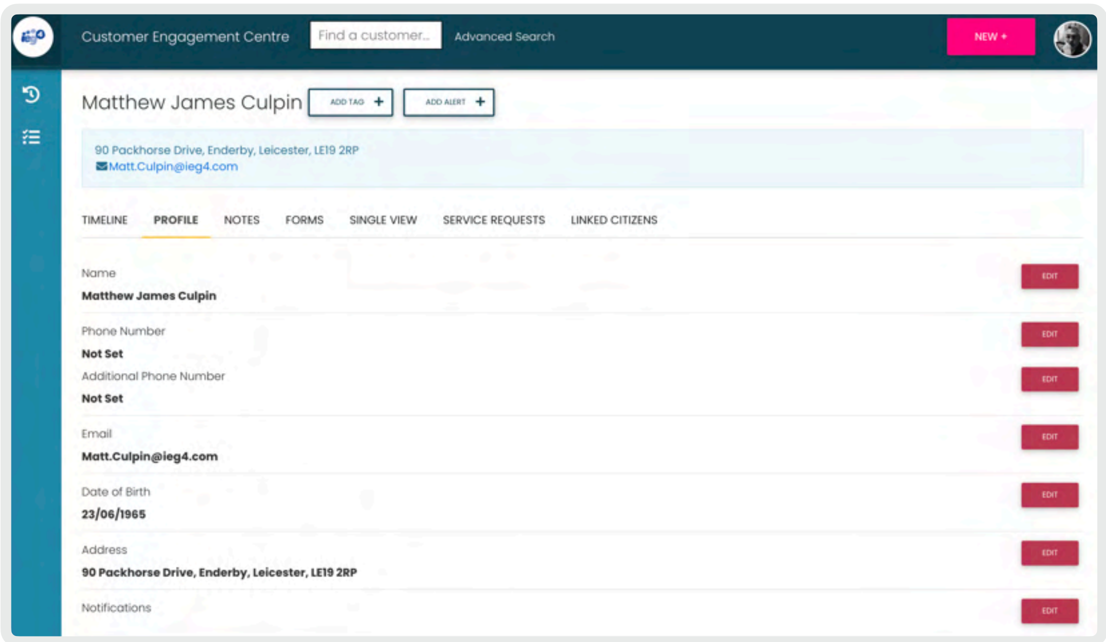
By providing a unified platform where all customer-related information, from personal details to interaction histories, is securely stored. This consolidation of data eliminates the need for multiple databases, allowing council staff to access current information swiftly. This leads to more informed decision-making and consistent service delivery, ensuring that all departments are aligned and can collaborate effectively.

Improved Customer Service

Enables council staff to quickly access a complete view of a customer's interactions and issues. This capability is particularly crucial for managing repeated inquiries and complex issues that may require co-ordinated efforts across various departments. By enabling staff to respond more effectively and efficiently, IEG4's CRM plays a key role in improving the responsiveness and quality of council services.

Enhanced Communication

By enhancing communication channels both internally among council departments and externally with the public. Automated notifications, reminders, and status updates are integral features that keep all parties well-informed. This reduces the likelihood of mis-communication and delays, thereby improving the overall service experience for residents.



Enhanced Citizen Engagement

The solution goes beyond streamlining processes to significantly enhance the ways in which councils engage with their communities. With features like self-service portals and automated feedback mechanisms, the CRM empowers residents by providing them easy access to services and a direct platform to express their concerns or feedback. This not only improves service accessibility but also encourages active participation from the community in local governance.

By not merely being a tool for managing customer relationships; it is a strategic asset that boosts operational efficiency, enhances service delivery, and fosters a more connected and responsive experience. By leveraging the capabilities of IEG4's CRM, councils can better serve and engage with their communities, leading to increased satisfaction and trust among residents. This comprehensive system is designed to meet the unique needs of councils seeking to modernise and improve their interaction with the public.

Features

- Conduct both quick and advanced searches to find a customer
- Create a new account for a customer using an email address or mobile phone number, incorporating validation to ensure accuracy of information and prevent duplicates
- Create an account for a customer without an email address
- Authenticate a customer over the phone by asking the same security questions they would face if they authenticated themselves for services like council tax, benefits, and licensing
- View online forms that the customer has in progress or completed, with the capability to open these forms at the point where the customer left off
- Access and complete any online forms that customers have access to
- Access and complete online forms that customers do not have access to
- View any requests that are currently in process, including the ability to add notes or evidence where appropriate
- View and modify details within a customer's profile where appropriate
- Initiate a call or face-to-face contact, including recording:
    - The location of the interaction
    - The department or service area concerned, e.g., Waste Management or Council Tax
    - The type of contact within the service area, e.g., missed bins or bulky waste within the Waste Management service area
    - The outcome of the interaction, including whether the contact was avoidable
- View details of phone calls or face-to-face contacts within the Contact History
- View, add notes or alerts concerning the customer across all council service areas
- View a timeline of all activity on an account, with options to filter and focus on specific activities

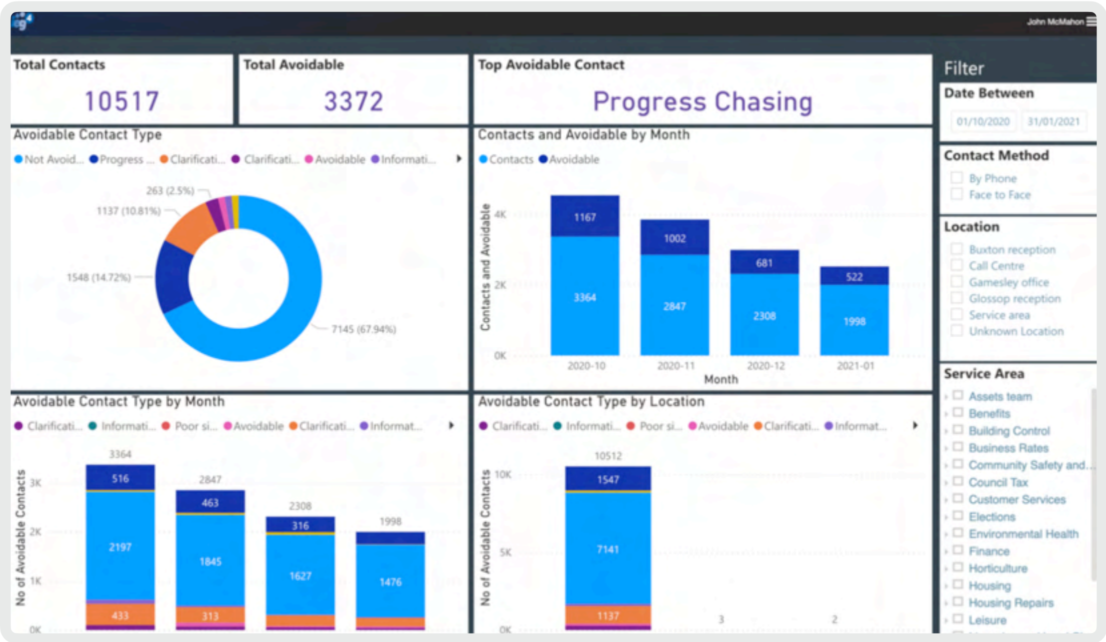
CRM Reporting

In addition to the reporting capabilities within IEG4's Portals, dedicated reporting tools enable customer services managers to understand the details of contacts made and staff performance. A set of dashboard-based report books includes:

- Contacts by:
- Type (Phone/Face to Face)
- Department (Council tax, waste, etc.)
- Purpose (e.g., missed bin in waste)

- Location (e.g., call centre or council office)
- Date range
- The user that handled the call
- User statistics, including:
- Number of contacts logged
- Average contact duration

This functionality allows for detailed analysis, such as determining the number of phone calls received for a specific service that were avoidable and related to progress chasing, occurring at the Call Centre during a specific month, should you wish to examine this aspect.



Example reporting dashboard