Victoria Forms Service Definition

Version: January 2026

Electronic Forms and Cloud-Based Processing System

G-Cloud Service Overview

Victoria Forms can design bespoke electronic forms or provide pre-designed form templates. These forms are then placed in our Cloud Based system, Enterprise Forms Server (EFS), which presents, processes and stores completed electronic forms.

With a proven track record of providing easy-to-complete intelligent online forms for over twenty years, customers benefit from Victoria Forms' unique online forms technology, which has been adopted by Councils and government departments across the UK. We also work with educational establishments, recruitment agencies, and private sector organisations - providing high performance application processes.

Victoria Forms provides an off-the-shelf Software as a Service (SaaS) solution which can be tailored to an organisation's specific requirements, either by selecting ready-made elements from our comprehensive product set or requesting bespoke forms and developments which are compatible with EFS.

For Local Government, a range of over 325 template online forms and Calculators are available for Revenues and Benefits, Licensing, Environmental Health, House in Multiple Occupation (HMO), Planning and other Local Authority departments:

- For **Benefits**, our Housing Benefit and Council Tax Reduction Calculator and integrated online application Form provide Local Authorities with a tailored solution, which incorporates DWP legislation changes as well as the Local Council Tax Reduction / Support scheme.
- Our **Revenues** provisions include a wealth of ready-made templates for Council Tax and Business Rates/National Non-Domestic Rates (NNDR).
- Our **Licensing** provisions include ready-made templates for all types of Licensing Activities: Alcohol, Charity & Entertainment; Gaming, Betting & Lottery; Street Trading; Hackney Carriage (Taxi) & Private Hire; Public Health Permits & Licences; Animal Licensing; and more.
- For **Property/Private Sector Housing Licensing**, our provisions include House in Multiple Occupation (HMO) New Application & Renewal, as well as additional supporting forms.
- Our **Environmental Health** provisions currently include Service Requests and Food Inspection forms and is being expanded over time.
- Our **Planning** provisions complement the Planning Portal, by providing applications for Pre-Application Advice and Planning Complaints.
- Our **Building Control** provisions include Notices and Certificates, in an expanding library of template forms.
- Our **Housing** provisions include a suite of forms for Housing Register applications.

Alternatively, our dedicated Form Design service can create unique forms to fit specific requirements for any organisation.

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Implementation

Implementation involves Enterprise Forms Server (required), project management, training, and SLA based support.

Depending on the complexity of the project, our Standard Rates may be used for the implementation process and ongoing management, to ensure Victoria Forms can deliver the project requirements.

This could include, but is not limited to form customisation, made-to-order forms, bespoke software development, custom programming, project management, consultation, system monitoring, system calibration, hosting configuration, automation setup, integration analysis, and additional training.

Buyers can supplement their system at any time with additional products from the product set, depending on requirements. If a Buyer's requirement is not available within the existing product set, specific needs can be accommodated via a Service Area licence and custom form development.

System specification and functionality is under constant review and evolution to ensure a high-quality service.

Enterprise Forms Server

Enterprise Forms Server is a powerful system which handles the presentation and processing of online forms.

Self-service users can complete online forms using a standard web browser, without any additional add-ons. Registered users, where access permissions allow, can view completed online forms, download PDFs of completed application forms and manage the workflow stages of submitted forms. Automated, staged communication can be sent to customers, e.g. confirmation of the application having been received, as determined by the Administrator.

Unregistered users (an Organisation's customers) can be presented with a dynamic online form, styled to match an organisation's website and corporate branding. Depending on the previous questions answered, the online form will expand or contract in real time to expose or hide relevant questions and sections. This simplifies the online form for a customer, as the only questions they see are those that are relevant to their application – all non-relevant questions are hidden.

Web Forms are accessible (WCAG 2.2 AA) and responsive, enabling the completion of online forms on small-format mobile devices and by users with Visual Impairments, e.g. those using screen reader software.

Enterprise Forms Server includes flexible configuration options for each form, system configuration settings, and a comprehensive user management interface to control access permissions.

Online Form Features:

- The user is guided through relevant areas of the online form and is prevented from mistakenly entering data in the wrong areas, with whole pages being hidden where they are not relevant.
- A full range of field types are used to collect high quality data, including, but not limited to date fields, drop down lists, text fields/areas, check boxes, currency fields, and signature fields.
- Where useful, help messages can appear on the online form which relate to what needs to be entered to prevent confusion e.g. *You must fill in question x before filling in this section.*

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Online Form Features (continued)

- Data Validation is used where appropriate to ensure that the online form captures high quality data from applicants. This reduces form returns for an organisation and speeds up the application process for applicants. The online form will check for obvious mistakes and omitted data, with the validation component sweeping through the online form, highlighting errors, and giving the applicant the opportunity to make corrections.
- The full form content is loaded at the start of the user's session, allowing them to complete most of the online form without a continual live internet connection. This prevents the loss of data when navigating between pages while offline.
- Partially completed forms can be saved on the server during completion. A unique reference code is generated by Enterprise Forms Server which can be used to retrieve the form from any device.
- Top-level management information and statistics are available for registered staff users to access and determine the number of online forms submitted, saved, or being processed. Detailed statistical analysis is available via an optional reporting module, enabling the analysis of distinct online form data fields from a selected range of applications.
- An additional option is the ability to capture electronic signatures within an online form. A customer makes their signature with their mouse, stylus, or via touchscreen, and the image of their signature will appear on the online form. This is an alternative to a checkbox signature, or a printed declaration page.

Product Set

Ready Made Forms & Forms Libraries

All template forms are kept current, in accordance with legislative changes and best practice guidelines, ensuring that the organisation will always be supplied with appropriate content. Demonstration Libraries are available upon request.

All online forms are tailored to an organisation’s branding and provide in-form intelligence for error checking and validating responses, dramatically reducing application processing resources required by organisations.

Where enabled, AutoSave ensures partially completed forms automatically generate a reference number to allow users to retrieve their applications, or users can manually save their part-completed applications mid-way for later completion.

Where organisations support their users for form completion, if needed, organisation staff can also forward a partially completed online form to a customer for further completion, using a unique reference code.

Completed forms are available in PDF format, for Document Management System Storage or printing.

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Product Set (continued)

Back Office Integration

Submitted forms can be exported as XML files to allow data to be integrated with existing Back Office Systems. We have 20+ years of working examples across many Local Authority Customers.

- **Benefits:** New Claims and Change in Circumstances integration is available with NEC (previously Northgate), MRI (previously Capita), and Civica. Free School Meals integration is available with the Eligibility Checking Service (ECS).
- **Revenues:** Direct Debit, Single Person Discount (Application and Removal), and Change of Address integration is available or under development, with NEC (previously Northgate), MRI (previously Capita), and Civica.
- **Licensing:** Taxi Licensing and General Licensing integration options are available with Idox Uniform. Some integration with Civica APP (Flare) is also available, as well as Idox Cloud (Tascomi).
- **House in Multiple Occupation:** House in Multiple Occupation Application and Renewal integration is available with Idox Uniform.
- **Environmental Health:** Environmental Health Reporting and Service Request integration options available with Idox Uniform.
- **Planning:** Pre-Planning Advice and Planning Complaints integration options available with Idox Uniform.
- **Other:** Victoria Forms are happy to work with different departments to develop integration (where possible and subject to full analysis) for other Back Office systems if required.

Simplified Eligibility Calculator and Processing for CTR

Options are available for Local Authorities who have changed or are looking to change the way they administer CTR – via a banded scheme.

A bespoke CTR data capture online form can be designed and built to specification, capturing relevant data for the Local Authority's individual scheme. Intelligent fields can calculate income totals as data is being entered, and most importantly, the form can calculate the CTR Award in real time.

The CTR Award is displayed at the point of submission, providing applicants with an instant result which can then be applied to their Council Tax account. This approach significantly reduces processing time and required communications for this type of application.

An Application Management System can also be developed, to store information, assist with forecasting and recalculate eligibility for easy reviews.

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Product Set (continued)

Advanced Document System Integration

As standard, Enterprise Forms Server generates a PDF file that can be sent to a document system via email, or manual upload.

To automate this process, some document systems have facilities to import the form file, along with indexing instructions.

With some custom coding, our system can generate detailed indexing information for each form (e.g. a Unique Property Reference, A Benefit Claim Number, a Council Tax account number, etc.) and send this along with the form directly to the document system - in many cases allowing fully automated indexing.

The indexing method depends on the document system and may require an Importer Module or Scheduler to be supplied by the Document Management System provider.

Attachments / Evidence Capture

The Attachments / Evidence Capture Add-On Module effortlessly handles the processing of files and attachments to support various application types.

An 'Upload and Attach' button can be enabled at the top of each form, or templates can include 'File Fields' which allow documents to be uploaded against specific requests.

Attachment of electronic files to an online form is available as an optional add-on for any form supplied. This enables the attachment of pre-determined electronic file formats and sets a limit to their size (a 'whitelist'), as determined by the Administrator, thereby limiting risks to IT systems.

Images can be stored alongside submitted forms in Enterprise Forms Server as well as being exported to a document system as one package.

Statistics Module

Using Victoria Forms' powerful add-on module, statistics are easily generated from form data within Enterprise Forms Server.

Records can be filtered by online form type, category, individual user, user group (including web self-service), and date of submission, so key data can be retrieved easily.

The built-in Report Designer allows the easy selection of specific form fields from which to gather data. Simply open any online form template and click the question fields required for statistical reporting and add labels as appropriate.

Once the Report Template is complete, reports are generated on the server within a few seconds.

If helpful, report templates can be saved for re-use later or to make amendments and then re-run the report.

After creating a report, the exported data appears within the Statistics Module as a CSV file which can be opened in any popular spreadsheet application, including Microsoft Excel. Within the Excel spreadsheet, data can be analysed however required.

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Product Set (continued)

Offline Forms

Authorised users can create offline versions of forms and download blank and partially completed forms to their tablets, laptops, and PCs for completion where internet connection is unavailable.

Once completed the forms are held in a local database and automatically submitted when internet connection is available.

Offline Forms can work in conjunction with the Attachments / Evidence Collection Add-On for fully offline data and evidence collection.

Payment System Integration

Where fees are applicable, online forms can connect with the organisation's chosen payment provider to incorporate a seamless transition between form data and payments. Selected information can prepopulate the payment system, such as customer name and validated email address, saving time for the customer and preventing processing errors.

Payment systems we currently work with include, but are not limited to: XPay, CivicaPay, CapitaPay, Barclaycard, HeyCentric, and WorldPay.

Victoria Forms developers can investigate creating similar integrated functionality with other payment systems as required. Similarly, additional customisations to the advanced payment processing functionality can be developed according to Buyer specifications.

Localised Verification Framework (LVF)

Using expertise from within an Authority – a framework is built on the Victoria Forms system to adjust Evidence Requests in real time, reducing the need for applicants to gather excessive evidence documents.

Paired with our Attachments Module, the Localised Verification Framework (LVF) is an effective way of minimising staff time spent processing unnecessary evidence and physical documentation. LVF is available for Housing Benefit New Claims and Change in Circumstances Forms.

Map Integration

For forms where location is important, customers may benefit from having access to an interactive map to select the correct address, rather than using an address lookup. This is especially useful in situations where the customer does not know the postcode of a property.

The Victoria Forms Map Integration add-on uses a third-party map provider to produce an integrated map within the online form. This allows customers to drop a pin on their selected location (or use location services to automatically do this) and the system will return relevant information about nearby locations.

The communication with the database held within a back-office system (such as Idox Uniform) provides very accurate location results, as it uses registered addresses instead of simple geocoding.

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Product Set (continued)

Address Lookup

Any online form asking for an address can have the Address Lookup functionality added to it, using a snapshot of a back-office property database, a service such as Gazetteer for example or a third-party address database. Utilising this data, the online form links to the address database to return results based on what is entered into the search field.

If the Address Lookup is enabled on an online form, the address field will be inactive until the address lookup window is launched. This helps to avoid mistakes in typed addresses and boosts the quality of the data collected. Customers are presented with a button which opens the address lookup window, where they can search by street name, postcode or partial address. A list of results from the connected database is returned and the customer can select a valid address from the list. If the customer's address is not there, depending on how the form is configured, there is the option to type in an address manually.

The lookup facility is most useful when online forms are integrated directly into a back-office system, where the addresses listed have an associated Unique Property Reference Number (UPRN) ensuring that the back-office system accepts the address as valid. Addresses without the UPRN may require manual intervention for processing, which is time consuming.

The Address Lookup can be enabled or disabled on a form-by-form basis. Configuration can determine whether customers can manually type in an address or not – giving full control over how the lookup works.

CRM / Portal Integrator

For organisations that wish to use our online forms in conjunction with their own CRM system and / or a Customer Portal, Victoria Forms supplies a ready-made module, which allows integration with minimal additional coding.

Key features include:

- Online form pre-population: useful data can be passed from the CRM or Customer Portal system to pre-populate online forms in open XML format.
- Controlling online form features: the XML data sent from the CRM and Portal systems to the online form can include instructions to control the online form. Such as turning off forced error checking or turning on letter template pages.
- Data return: where useful, data can be returned to the CRM and Customer Portal systems in a suitable format. This can be data from the online form, but also data about the form – this information can then be added to the CRM system alongside the appropriate customer's record (e.g. submission date).
- Customised Mail-Merge Letter: a customised letter can be designed to be automatically created as the applicant completes the online form, for the purpose of printing and posting detailed information to the applicant with dynamic content, specific to the customer's application.

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Product Set (continued)

Bank Account Details Validation

Automatically check bank account details in real time as they are entered into the online form with the Bank Account Detail Validation Add-On.

The online form opens a new window when the user clicks into the Sort Code or Account Number fields and prompts for entry of valid details. An instant validation result is returned from a third-party web service showing the status of the validation checks and whether the account can be used for Direct Debit payments for example.

Forms Design Software – VF Creator

For organisations that wish to design online form templates in house, Victoria Forms can provide a Forms Design Software Package. VF Creator is an Add-In for Microsoft Word which allows users to design, create and maintain online forms *within* Word.

Microsoft Word is open software, which allows third party developers to add enhancements to Word, providing new functionality for users creating documents. Such products are called Word Add-Ins.

We have created a Word Add-In which allows users to create forms within Microsoft Word. Using our Enterprise Forms Server component, these forms can then be published to Enterprise Forms Server, which converts these into online forms that end users can fill in on any device, in any browser. End users do not need to have Microsoft Word installed.

Users can take advantage of all the features within Microsoft Word to create professional and stylish online forms. Using VF Creator, form fields can be placed anywhere within the document. Properties can be set for individual fields, specifying how they are to behave when they are part of an online form.

When the design of the form is complete, our server uses this template to generate a smart, online form. When forms are opened in a browser, they are displayed with an online form viewer with form controls.

Many advanced features are available to form designers, including:

- Checkboxes, tick-boxes, date fields, email fields, drop down lists, combo-boxes, and currency fields
- Business Validation rules
- Field by field help
- Page hiding / displaying on multipage forms
- Fields and sections being enabled/disabled as each user completes questions
- In-field calculations and scripts
- Handwritten Signature Capture
- PDF Quality Display at any zoom level
- Email Notifications and Receipts

These features are available alongside the numerous features within Microsoft Word for designing documents. Including tables, text boxes, shapes, images, styles, document styles, multiple languages, grammar, and spell checking.

Users can download our software, create forms in Microsoft Word, and then publish them to an online account, where blank forms can be accessed over the internet, Administrators can log in and retrieve completed online forms.

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Product Set (continued)

Campaigns

The Campaigns Module allows authorised users to create an online form template that can be sent to a pre-defined list of contacts (contact database) and track the responses.

When a Campaign is created, the system allows the user to select the online form template, provide some details about the sender, and a date the campaign should begin. A customised email can also be defined.

A contact database/spreadsheet can then be imported into the system, including recipients and any data which the user wishes to populate automatically into the form.

Automatic reminders can also be set within the system to encourage a better response rate.

The responses to the online form are tracked, providing a detailed status of each recipient and allowing the user to accurately monitor progress.

Processes

With the Processes Add-On Module, any number of 'Processes' can be added to a Blank Form.

When Processes is enabled, online forms can be configured to automatically forward to a user or email address when submitted – for amending, providing additional information or approval. This can be configured to happen any number of times, depending on how many people are needed for approval, and each step can be conditional depending on the form data provided. Email notifications or receipts can also be configured to be sent at any stage, so staff are kept informed.

Additional process functions are being added over time.

Processes can be used for more complex scenarios, which involve changing behaviour of the online form itself based on the stage of the processes the form has reached. Fields can be made 'read only' after each process stage, ensuring that data cannot be edited, for example.

Advanced Electronic signatures (available for selected setups)

Advanced Electronic signatures allow additional validation for online signatures – preventing an online form from being altered after signing, allowing a 'signature' without the need for a touchscreen device, and providing an additional level of authentication for the signee.

Additional options can also be specified for the signature fields: Signature Type; authenticate user; Data integrity check, and a pre-populated Signature Date field.

Send-For-Sign (requires VF Creator)

Generate documents for signature within Microsoft Word and add signature fields directly to the document with VF Creator's Send-For-Sign feature.

Once the document is ready to sign, an online version can be generated immediately, with options to send directly from Microsoft Word, or generate a link which can be added to an email.

Receive completed documents into Enterprise Forms Server, with automated notification emails to alert when documents are ready for processing.

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Product Set (continued)

Training Needs Analysis (TNA)

Victoria Forms online Training Needs Analysis service allows Local Authority managers to accurately assess the skill levels of Revenues & Benefits Department staff and identify knowledge areas where staff excel, and areas where skill levels can be improved.

This assists in identifying where to target limited training resources to achieve the most benefit.

Additional Products

Development of additional products and modules for our core software Enterprise Forms Server is ongoing.

Various projects are in progress at the time of writing this document, such as MultiForms.

Cloud Hosting

Where Victoria Forms provide hosting, the online forms system is hosted with Microsoft Azure.

To help organisations comply with national, regional, and industry-specific requirements governing the collection and use of individuals' data, Microsoft offers the most comprehensive set of certifications and attestations of any cloud service provider. For further details, please view Microsoft's Compliance website located at:

https://www.microsoft.com/en-us/trustcenter/Compliance

GDPR:

Victoria Forms' systems have a built-in data-cleanse facility, which can be set to permanently delete data from the system after a set period of days, as specified by the Buyer.

Customisable online forms and configuration options ensure that bespoke Privacy Policy details can be included within every online form.

Training

Depending on what is appropriate for a client's needs, there are various means for the provision of training.

Detailed manuals on how to use the system elements are included with the solution offered, in addition to the option of complimentary initial self-training resources. Provision of webinar training can be provided as part of project implementation. Where onsite training is requested, a charge may be applicable. This will be detailed clearly in advance if this option is raised as a possible option to be considered.

Ordering and invoicing process

Buyers should follow the G-Cloud Guidelines for making orders through G-Cloud. Invoicing is annually in advance; payment is due in the next 30 days of the invoice date. Where any initial setup of additional/optional services has been selected, an initial setup fee may apply and will be added to the first invoice. Payment via BACS is preferred.

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Data restoration / service migration

Data is backed up daily. If there was any data loss by the system, e.g. due to a hardware failure, all data from the latest backup would be restored within 24 hours of its known loss with the most recent backup with stable and usable data.

It is expected that the Buyer will have ongoing access to the data and will be downloading this data regularly, therefore there is no expected need for the supply of data for migration purposes, given this data will have been used to update the organisation's own database(s) already.

Buyer responsibilities

The Buyer will need to provide Victoria Forms with the following:

- Branding information, including but not limited to: the Buyer's logo file, contact details for inclusion on online form(s) and either a web link or mock-up for any customised viewer commissioned.
- Primary, named contact at the organisation for service Administration-related activities and queries.
- Inclusion within the organisation's website page(s) of the relevant URL link for the online form(s), as provided by Victoria Forms.
- Technical liaison and testing resource within the organisation for Victoria Forms' integration with relevant back-office systems, where this option has been procured.
- Confirmation of the IP address that will be used by authorised organisation staff for accessing the Administration management interface for the system.

The Buyer will also be responsible for the setup of registered user profiles on the system for staff users to access the system, e.g. for downloading completed online forms, etc. This is very straightforward to do and does not require any specialist IT skills.

Technical requirements

Access to any of the leading web browsers with an internet connection is all that is needed for both organisation staff and its customers to access the online forms (and the Administration interface for appropriately authorised staff). Given the system pre-loads an entire online form into the user's browser from the start; slower, or interrupted internet connections will not affect the usability or performance of an online form whilst a user is completing it.

There are no other requirements unless integration with back-office systems is required. In which case a small application on one of the organisation's servers will need to be installed, to receive secure data from the private cloud server which holds submitted customer data. This can be installed on a shared in-house server. An alternative approach would be to use a VPN if preferred.

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Service Levels

Description:	Service Level Target:	Comments:
Target Service Availability:	98+%.	Does not include scheduled maintenance, which is normally conducted outside working hours and notified to affected customers.
Service Desk Support Hours:	Monday to Thursday: 09:00 to 17:30 GMT, Friday: 09:00 to 17:00 GMT.	Excluding English bank and public Holidays and between Christmas and New Year. Out of hours technical support is available upon request and as mutually agreed.
Initial Response Time:	60 Minutes	Target response time for the Service Desk to respond to any queries or requests for support or Service Requests within Service Desk Support Hours. Initial Response Time taken from time of receipt of email / call requesting support that contains all required information.
Incident Management Target Response Times:	Priority 1: 60 Minutes, Priority 2: 180 Minutes, Priority 3: 1 Day, Priority 4: None.	IM target response time starts from Initial Response Time (during Service Desk Support Hours). No Service Level defined for Priority 4 Incidents, as they are logged for information purposes only.
Incident Management Target Resolution Times (Recovery Time Objective):	Priority 1: - Non-hardware failure: 0.5 Days - Hardware failure: 1 Day Priority 2: 1.5 Days Priority 3: 3 Days	Target Resolutions for Priority 2-3 incidents that involve Hardware failure may be longer.
Recovery Point Objective:	User data – 10 Minutes Configuration – 1 Day	This RPO is governed by our Backups Policy
Anti-Virus Software Installed:	On all the hosted servers	Kept up to date with daily automatic updates from Anti-Virus software vendors. Does not guarantee virus-free files, each user must run their own anti-virus software to ensure that they do not download or propagate virus infected files.
Named Account Manager:	For Each Client.	Responsible for managerial and enquiries that do not fit in the remit of the day-to-day delivery of services by the Service Desk.
Response to bespoke enquiries:	One week.	All enquiries must be raised via the Service Desk.
Regulation/Legislation updates:	For Each Customer	Updates to all template online forms supplied for regulation / legislation changes, prior to policy change implementation.

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Service Levels (continued)

Priority Levels

This list of priority levels is not exhaustive, and Events will be assigned to a priority during the initial response time. If there is disagreement with the priority assigned, customers should update the existing support ticket requesting the priority be reviewed, with their reasons.

Priority 1

Incidents involving system outages resulting in any of the following:

- Inability to load and access our software
- Inability to open any of the public self-service forms
- Issues making it impossible for forms to be submitted
- SSL or TLS security warnings being displayed when accessing the forms or software
- Offline software not submitting forms locally or to the online software
- Internal systems not downloading submitted forms from external servers

Priority 2

Incidents affecting the customer experience but not preventing system access or form completion. These incidents include:

- Add-on modules not functioning correctly (but still allowing form submission) including:
    - Address Lookup
    - Portal Integration
    - Bank Account Validator
    - Stats Module
    - Text Messaging
    - Offline Software
    - Attachment Module
- Failed integrations including:
    - PDFs not integrating to the Document Management System
    - XML integration failure to the Back-Office System
- EFS software not producing PDFs from submitted forms
- EFS software not producing XML data from submitted forms

Priority 3

Incidents involving System Configuration changes, or requested System Configuration Changes including:

- Updating system configuration
- User management including password resets
- Form configuration updates

Priority 4

Incidents logged for development work including:

- Requesting form changes
- Suggesting system improvements

No resolution time defined for Priority 4 Incidents, as they are logged for information purposes only.

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