

Victoria Forms

Attachments/Evidence Collection Add-On

Enhance Victoria Forms' Enterprise Forms Server with the Attachments / Evidence Collection Add-On Module, which effortlessly handles the processing of files and attachments.

Staff, partners and clients can upload files directly from their computer, or can use a camera or scanner to create image files. These files can be attached to any form that has this module enabled.

The screenshot shows a web interface for a 'Demonstration Form'. At the top, there are navigation links for 'More resources' and 'Contact us'. Below the Victoria Forms logo, there are several buttons: 'Back', 'Select Page', 'Show Errors', 'Help', 'Print', 'Load', 'Save', and a green 'Submit' button. A 'Case Info' button is also present. Below this, there is an 'Upload & Attach File' button, a status indicator '3 file(s) attached', and a 'Show / Hide Attachments List' button.

Attachment Filename	Location	Action
Finance Documents:		
Bank Statement.tif	Server (Temp)	Rename Delete Up Down
Identity:		
Passport.jpg	Server (Temp)	Rename Delete Up Down
Rent Evidence:		
proof-of-residence-letter-from-landlord-1.png	Server (Temp)	Rename Delete Up

Below the table is an 'Evidence Request Form - Submit Evidence Documents Online'. It contains several input fields:

- Surname: Applicant
- Other Name(s): Example
- Any other names that you have used: (empty field)
- Title: Miss
- Email Address: example@example.com
- National Insurance Number: AB123456A
- Reference Number: (empty field)
- Address: Example Address Line 1, Example Address Line 2
- Postcode: PO57 0DE

Custom Settings on a Form by Form Basis

Attachment of electronic files to an eForm is available as an option for any eForm supplied. This option enables the attachment of pre-determined electronic file formats and set limits to their size (a 'white list'), as determined by the Administrator, limiting any risk to IT systems at the Council.

Each form can have predetermined attachment categories (groups) set by an administrator, or the form can be configured to allow applicants to organise their files into groups themselves.

The screenshot shows the 'Attachments Configuration' settings page. It has two main sections:

- Document Grouping:** A dropdown menu set to 'Custom Groups'.
- Whitelist of Filetypes, Max Size:** A list of allowed file types and their maximum sizes:
 - jpg, 10000
 - pdf, 10000
 - png, 10000
 - pic, 10000

Below these sections, there are two columns of checkboxes for 'Custom Document Groups'. The first column has 'Finance Documents', 'Identity', and 'Rent Evidence' checked. The second column has all three unchecked.

Evidence Collection: New Claims

For the New Claim process, documents or images required as evidence may be attached to the HBCTR Claim Form itself and/or used in conjunction with an **Evidence Attachment eForm**.

When the HBCTR Claim Form is submitted, a personalised Evidence Checklist is generated to help the claimant assemble the appropriate verification documents in the hours or days following the submission. These items can be submitted using the Evidence Attachment eForm straight from the claimant's home, without the need for customer service handling.

Page 38 Evidence Checklist

- Have you completed the claim form and resolved all errors and omissions?
- If required, have you provided additional information on page 35?
- Have you read and completed the declaration?
- Have you acknowledged any evidence you need to provide along with your claim?

Tick here to confirm this:

We must see proof of the information that you have provided in this claim form. The proof must be supplied within one month of the date you submit your form.

Once you have submitted your form, the following list is created as you fill the form. It shows categories of evidence you must provide in support of your application. More details about what is acceptable as evidence are listed over the following pages (click the "Next" button to view this information). Please check that you have included all the evidence we need to process your claim - you can print this page if you wish.

Evidence Checklist

- (Part 1) : Proof of your identity and National Insurance number. We need to see two original documents, one of which should show your National Insurance number.
- (Part 5) : Evidence of your income from self-employment, such as your trading accounts for the last financial year. If you have only recently set up business and do not have a full year's accounts, we will need to see some other proof of your income/expenditure.
- (Part 6) : Evidence of your income from employment. Your last 5 consecutive payslips if you are paid every week, your last 3 consecutive payslips if you are paid every 2 weeks or your last 2 consecutive payslips if you are paid every month.
- (Part 11) : Evidence of the type and length of tenancy, and what is included with your rent (like meals, heating, lighting, etc).
- (Part 11) : Proof of your rent and how often it is paid.



Proof of Residency Letter from Landlord

Dear [Mr/Ms./Mrs. Last Name]:
 My name is [Your First and Last Name]. I am the landlord of [Apartment Complex], located at [Apartment Complex Street Address, City, State, Zip Code]. I'm sending you this formal letter as proof of one of my tenant's residency. [Tenant's First and Last Name] has lived at [Apartment Complex], [Apartment Number] since [Day, Month and Year your tenant first started living there.]. [His/her] rent is [Dollar Amount of Rent] per month.

If you have any questions, feel free to contact me by phone at [Phone Number], or by regular postal mail.

Sincerely,
 [Signature]
 [Your Name]

POSSIBLE CHANGE TO STATEMENT

Page 1 of 5

Lloyds TSB

00002
 MS S GREEN
 12 SAMPLE STREET
 SAMPLE TOWN
 SAMPLE COUNTRY
 AX1 1BB

Statement number: 50
 Issue date: 15 April 2010
 Write to us at: Lloyds TSB, PO Box 1, BX1 1LT
 Call us on: 0845 9 000 000 (from UK)
 Visit us online: www.lloyds.com
 Your branch: Access Green - Birmingham

Sort code: 11-19-41
 Account number: 88888888
 IBAN: GB29 11 1900 18888888
 BC: 8888888888

Platinum
 15 March 2010 to 15 April 2010

Your Account	Planned Overdraft limit	£3000.00		
Date of your previous statement	14 Mar 2010	Type of fee	Quantity	Total
Balance on 15 Mar 2010	£300.00	Monthly Overdraft Usage fee	1	£3.00
Money in	£250.00	Returned item fee	1	£3.00
Money out	£100.71	Monthly account fee	1	£3.00
Balance on 15 Apr 2010	£150.00	Other charges	1	£3.00
Average credit balance	£100.00	Total fees	4	£12.00
Average debit balance	£50.00			

The fees detailed above have been paid during this statement period.
 The fees paid in this statement period are explained in the 'Fees Explained' on the reverse.

Summary of your interest		
Credit interest you received on your average credit balance of £1000.00		£1.00
Credit interest we paid you		£3.00
Credit interest you could have earned		£2.00
Debit interest you paid on your average debit balance of £500		£3.50
Planned debit interest		£3.00
Unplanned debit interest		£3.50
Total cost of your account including fees, debit interest and credit interest		£44.50

Your Interest Rates		
Amount of credit balance		Credit balance
£0.00		0.01% per month (0.30% APR)
Amount of Planned Overdraft		Planned Overdraft
£0.00		0.00% per month (0.00% APR)
£250.00		0.15% per month (1.74% APR)
Amount of Unplanned Overdraft		Unplanned Overdraft
£0.00		0.15% per month (1.74% APR)

*APR is the Annual Equivalent Rate. This is the actual annual interest of an Overdraft. It does not take into account other fees and charges.

**AER stands for Annual Equivalent Rate and illustrates what the interest rate would be if interest was paid and compounded once a year.

For credit interest, your summary of interest shows the amount of credit interest we paid you, as well as the credit interest you would have earned on the average credit balance you had on your account if you earned a rate of interest equivalent to the Bank rate.

We will give you at least 14 days notice before we take any interest or fees out of your account. Interest rates and fees are detailed as at the date of this statement.



Indexing into EDRM Systems

Images can be stored alongside eForms in the eForms server, and can also be exported to a document system as one package.

To assist indexing in the electronic document management system (EDRM), images may be named and grouped into meaningful documents for exporting as separate PDF or Tiff files (e.g. a bank statement PDF, a tenancy agreement PDF, etc.).

Straightforward configuration settings determine how attachments are collated, ordered and exported to the EDRM system as a PDF or TIF image file.

The image shows two overlapping screenshots. On the left is the 'Form export' configuration window, and on the right is the 'Evidence Request Form - Submit Evidence Documents Online'.

Form export configuration:

- EDRM Export:**
 - When EDRM export occurs: on submission
 - File Format to export to EDRM system: PDF
 - If TIFF format - Image quality settings: [empty]
 - Location of different UFX from which to do conversion: [empty]
 - Sequence of page numbers for conversion: 5,4,6-10,1
 - Remove non displayed pages: [checked]
 - Email recipients for exported PDF attachments: [empty]
 - Subject text of email to EDRM: [empty]
 - Prefix for names of exported file(s): [empty]
 - Exporting of attachments: Images added to exported form as extra pages
- XML Export:**
 - When XML Export occurs: No Export
 - Email recipients for exported XML attachments: Images added to exported form as extra pages
 - Subject text of XML export email: Images exported as a single document, Each image exported in separate documents, Export images as grouped documents
- Advanced Exporter Configuration:** [empty]

Evidence Request Form:

- Page 2 - Main Form
- Evidence Request Form
- Council Name: [empty]
- Evidence Request Form - Submit Evidence Documents Online
- Surname: Applicant
- Other Name(s): Example
- Any other names you have used: [empty]
- Title: [empty]
- Email Address: example@example.com
- National Insurance Number: AB123456
- Reference Number: [empty]
- Address: Example Address Line 1, Example Address Line 2
- Postcode: G057 0GB
- Please indicate to which Council department you wish your evidence to be submitted:
 - Council Tax: []
 - Benefits: [X]
 - Council Tax Support: []
 - Non Domestic Rates: []
 - Recoveries: []
 - Appeals: []
 - Free School Meals: []
 - Discretionary Housing Payments: []
 - Council Tax Discretionary Relief: []
- Please attach any additional information to this form, and if necessary make notes in the box below:
 - Bank Statement
 - Scanned Passport

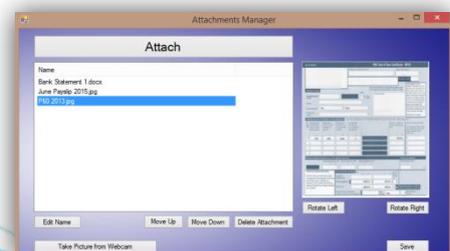
Where an Evidence Attachment eForm has been used to provide evidence to support an application, the system uses the information entered into both forms to index the evidence alongside the original form, keeping all relevant documents together.

Offline eForms

When used together with the Offline eForms Module, the system provides for automatic camera connection.

Multiple pages of documents may be photographed. When the camera is then plugged into the laptop, the software automatically retrieves images from the camera and attaches them to the on-screen eForm.

When the system reconnects to the internet, the attachments are uploaded directly to the online system, ready to be processed in the same way as an online form.



Customer Spotlight

Barnsley Metropolitan Borough Council

Barnsley is located in South Yorkshire and has a population of 235,757. Barnsley is notable as a former industrial town centred on coal mining and glassmaking and its culture is rooted in its industrial heritage; Barnsley has a tradition of brass bands, originally created as social clubs for its mining communities.

Barnsley receives high volumes of online form submissions – in excess of 3,000 applications per month. A quick processing time is essential and the more application stages that can be done online, the simpler and more cost effective it becomes for staff to assess each application.

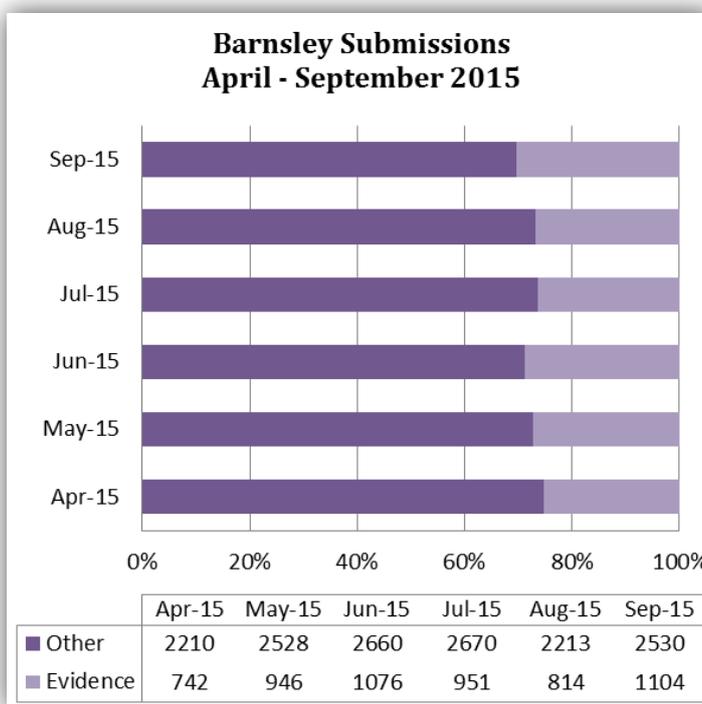
Evidence Attachment eForm

On submission of all Barnsley’s eForms, a link to the Evidence Attachment eForm is provided, both in the on-screen submission message and in the customers’ submission confirmation email.

This link to the form coupled with a personalised Evidence Checklist has made the Evidence Attachment eForm one of Barnsley Council’s most frequently received eForms, with submissions accounting for 28% of all of Barnsley’s received forms in the first six months.

Where original documents are required, applicants are instructed to bring documents to the Council offices to be verified.

Staff members who process these original documents also use the Attachment eForm to capture evidence, ensuring that all evidence is indexed in the same way, alongside the relevant claim form in Barnsley’s document system.



Victoria Forms’ Attachment Module and Evidence Attachment eForm combination has become very popular, in line with an increase in Councils accepting electronic documents as evidence to support applications for Council Services.

A separate Evidence Attachment eForm allows time for claimants to gather evidence after submitting a claim, while preserving the ability to complete everything online and ensuring that all information related to an online claim is indexed alongside the correct form.

To find out how Victoria Forms can work for you, please contact us:

01284 701000

VicFormsSales@victoriaforms.co.uk

To find out more, please visit our website - www.victoriaforms.co.uk