

# CASE STUDY

## BASILDON DISTRICT COUNCIL

Basildon Council is located in southwest Essex and encompasses the towns of Basildon, Billericay and Wickford; and has a population of 178,362.

### Major Transformation

Basildon District Council is a longstanding customer of Victoria Forms' innovative electronic forms technology - simplifying their claims process since December 2006. The solution provides electronic forms via Basildon's website for self-service, as well as on their internal system for face-to-face and telephone assisted claims, and via registered 3rd party agencies.

As of January 2015 Basildon are live with 30 of our eForms, making them a prolific eForm user in our customer portfolio. Notably, Basildon are using our eForms to streamline their in house processes with the addition of bespoke internal invoicing forms in January 2015.

### Victoria Forms' Intelligent and Reliable eForms

Once opened, all our forms run offline and are therefore unaffected by lost connections or stalled servers. This is not only beneficial for those completing forms at home, but also for advisors who have full confidence that they will never be stranded mid-interview.

Our eForms check themselves for any errors, highlighting anything that is missing from the forms and any obvious mistakes, such as incorrectly formatted postcodes or dates. Error checking is only forced at the point of submission rather than on each page like traditional web forms, as it can be infuriating if the claim interview cannot progress when the claimant does not have all required information immediately to hand. Basildon's eForms gives staff and self-service users the discretion to work through the form in the manner they see most fit.

### System Benefits and Savings

- Paperless benefits department (immediate savings of £5,000 per year)
- Significantly reduced processing, printing and postage costs
  - ✓ With paper forms, Basildon had to return or query 80% of all claim forms. With the eForm in place, only 20% require further clarification.
- Driven down new claim processing times
- Versatile Solution - Used for both assisted claims and self-service
- Automatic Integration to Civica document management system and Civica benefit system

# Comprehensive Forms Suite

During 2014, 10,456 forms were submitted; 3972 of which were new claims and the remaining 62% of submissions were the various forms below:

## Forms used throughout Basildon Council

### **Benefits Department**

- Accommodation Details
- Discretionary Housing Payments
- Habitual Residence Test
- Appeals
- Change of Address
- Self Employed Earnings
- Change in Circumstances
- Changes Questionnaire

### **Business Rates Department**

- Small Business Relief
- Combined Vacation and Occupation
- Discretionary Rate Relief
- Change of Circumstances

### **Council Tax – Revenues Department**

- Change of Address
- Combined Discount and Exemptions
- Additional Instalments
- Change of Circumstances
- Combined Vacation and Occupation
- Education
- Refund Application
- Notification Of Deceased

## Next Steps...

Basildon District Council are working with Victoria Forms to expand their library eForms, already adding 9 new eForms to their live system, and currently reviewing some new standard Housing Forms with a view to broaden their use of eForms even further.

## Nine NEW Forms added in 2015

### **Benefits Department**

- Bank Details Form
- Direct Payment to Landlord
- Fear of Violence

### **Business Rates Department**

- Retail Relief

### **Council Tax - Revenues Department**

- Final Notice Arrangement Form with Direct Debit Instruction (DDI)
- Summons Arrangement Form with DDI

### **Housing Department**

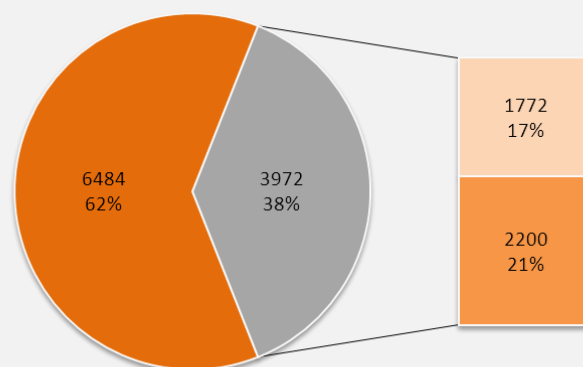
- Housing Direct Debit Instruction Form

### **In House – Internal Processes**

- Request to Raise an Invoice
- Request to Cancel an Invoice

## **FORM SUBMISSIONS**

**2014**



Other New Claim Telephone Self Service

## Combined Discount and Exemption Form

Basildon Council have worked with Victoria Forms to combine the numerous separate forms within our Standard Forms Library for each Council Tax Discount or Exemption into one simple form. This has been a valuable addition to our Standard Revenues Forms Library and has been taken up by many other Council customers.

The combined form has been live at Basildon since 18th December 2014 and offers the customer a number of options for Council Tax discounts or exemptions, based on whether the property is occupied or unoccupied. The Combined Discount and Exemption Form covers 29 different discount or exemption options.

### Where the Property is Occupied:

- Apprentices
- Child Benefit Recipients
- Foreign Language Assistant
- Student Nurse
- Youth Training Trainees
- Occupied by Under 18's
- Severely Mentally Impaired
- Students
- Visiting Force
- Annexe
- School / College Leavers
- Single Person
- Disabled Person

### Where the Property is either Occupied or Unoccupied:

- Persons In Detention
- Liable Person in Care Home / Hospital
- Estate of a Deceased Person
- Property Prohibited by Law
- Uninhabitable
- Liable Person away receiving Care
- Persons Providing Care

### Where the Property is Unoccupied:

- Care Workers and Carers
- Repossessed Property
- Empty Caravan Pitch or Mooring
- Unoccupied Annexe
- Empty and Unfurnished
- Empty, Awaiting Minister of Religion
- Owned by Charities
- Left Empty by a Student
- Left Empty by a Bankruptcy

The eForm's in-built intelligence ensures areas are skipped if irrelevant to the claimant's circumstances. As an example, although the form is compiled of 38 form pages, if you are simply applying for a Single Person Discount you will only view the following five pages:

1. Initial Claimant Details – About You
2. Select Discount / Exemption Page
3. Single Person Discount Details
4. Extra Information Page
5. Declaration

This has allowed Basildon to direct customers applying for a Discount or an Exemption to one easy to navigate form. Having received 123 forms in the first month of going live with the new form, Basildon are already seeing the benefits of having only a single form to maintain.



# Main Benefits Claim Form

## Telephone Claiming

On initial contact, a one-page Preliminary eForm is used to capture basic customer details. A call-back is then arranged within a day or two with a trained interviewer at Basildon.

The interval between the initial approach to the Council and the full interview gives the applicant time to gather necessary information which will be needed during the full application. During the call back, details entered in the Preliminary eForm appear automatically within the full HBCTS eForm.

Over the last 3 years (2012-2014 inclusive), Basildon Council received on average 4416 new claim forms per year. Of the 3972 new claims received in 2014, 1772 (45%) were completed by a trained interviewer.

## Self Service

The Basildon Main Claim Form is available to the public via a self-service method, as well as via telephone claiming. Within the Benefits section of the website, a direct link to 'apply online' has been added. The self-service option allows customers to complete the eForm at their own pace 24/7, and is much easier for the claimant than a paper form.

Around 55% of new claim submissions are now via the self-service method (2200 out of 3972 submitted claims in 2014).

## Extremely High Productivity

Victoria Forms' software has been designed with professional, high-volume users in mind. Our eForms are super-quick to work through; enabling Basildon Council's staff to increase productivity as they have gained experience in using the software. Claim interviews now take an average of 20 minutes per claim. For flexibility, appointments are booked in 30-minute slots.

Assisted claims often require a large team of interviewers; however, the Victoria Forms system is so quick and easy to use that nearly all claims at Basildon are taken by just two members of staff. Applicants also comment that the interviews are uncomplicated and fast, resulting in a more straightforward claim process.

## Export

Once submitted, the eForm is automatically converted into a PDF file and sent to the Civica document management system.

This ensures only relevant completed pages are saved in the PDF output, and cuts out the entire scanning process, which is time consuming and costly.

*"The system has had a most striking effect on new claim processing turnaround. Within six months of its introduction, new claim processing times fell by 58% - from 38 days on average to 16 days - one of the most dramatic improvements in UK claim processing."*

