

# CASE STUDY

## LONDON BOROUGH OF WALTHAM FOREST

One of five London Boroughs designated as a 'host Borough' for the 2012 Summer Olympics, Waltham Forest is located in Northeast London, with a population of 265,797. Winner of an **Excellence in Customer Services** award (IRRV 2010).

### Electronic Claims for over 10 years

Waltham Forest is a longstanding customer of Victoria Forms' innovative electronic forms technology – simplifying their claims process since December 2006. The electronic forms are available via self-service, face-to-face and telephone assisted claims, and via registered 3rd party agencies.

### Bespoke Solution

Their customized HBCTS eForm includes a customer questionnaire, integrated dynamic evidence checklist and Free School Meals questions. The eForm's intelligence ensures that only relevant questions and pages are displayed to customers and advisors.

Evidence is requested dynamically using Waltham's eRFI service (electronic Request for Information) - dramatically reducing printing and postage costs.

### System Benefits and Savings

- Eliminated all re-keying of data into back-office systems via direct integration into Capita Academy Benefits system
- Integration with Civica Document Management System (EDRMS) for prioritisation and auto archiving of completed eForms
- Over 1,700 electronic forms processed per month on average over the last year
- Centralised forms and claims management, accessible 24/7
- Assisted interviews take 19.5 minutes average (audited)
- Multiple forms completed with customer's data pre-populated in new forms
- HBCTS eForm includes auto-generated dynamic evidence checklist and customer questionnaire
- Considerable savings on; printing, postage and storage, post-room processing, scanning and processing, work-flow efficiencies, reduced customer requests, indexing automation.

## eForms for all Claim Types

The following eForms are currently being used by Waltham Forest:

- Housing Benefit and Council Tax Support Application Form
- Housing Benefit and Council Tax Support Entitlement Calculator
- Change in Circumstances
- Free School Meals
- Discretionary Housing Payment
- Intention to Claim
- Appeals Form
- Landlord Change in Circumstances
- DHP/DCTR Form

## Completion Routes

### Self-Service

Waltham Forest went live in December 2006 with their electronic application form.

Once the link to the HBCTS application form was promoted on the homepage of the Council's website, the take-up of new self-service application increased exponentially.

Waltham Forest now receives high volumes of application forms per month. In September 2014 they received 1965 forms, of which 684 were HBCTS application forms, of those 614 (**90%**) were self-service.

### Third party submissions

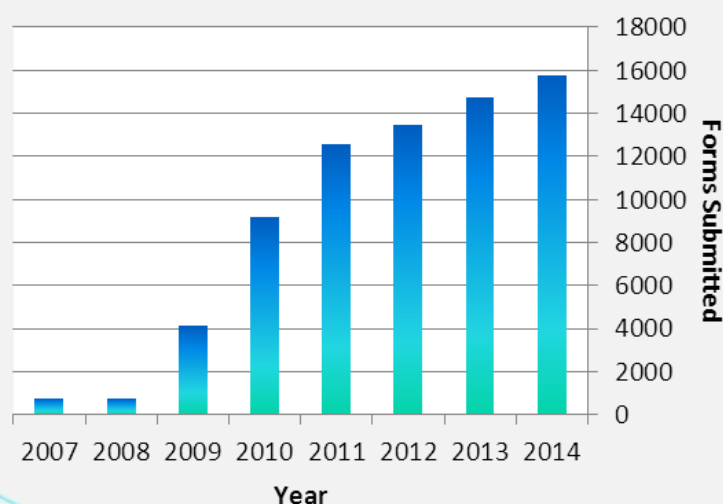
In August 2008, access was given to a number of trusted Third party agencies, including local Housing Associations, the Citizens Advice Bureaux, and a large YMCA hostel.

Staff at these organisations helped applicants to complete eForms and verify supporting evidence. A number of rent deposit scheme landlords also submit claims on behalf of their tenants.

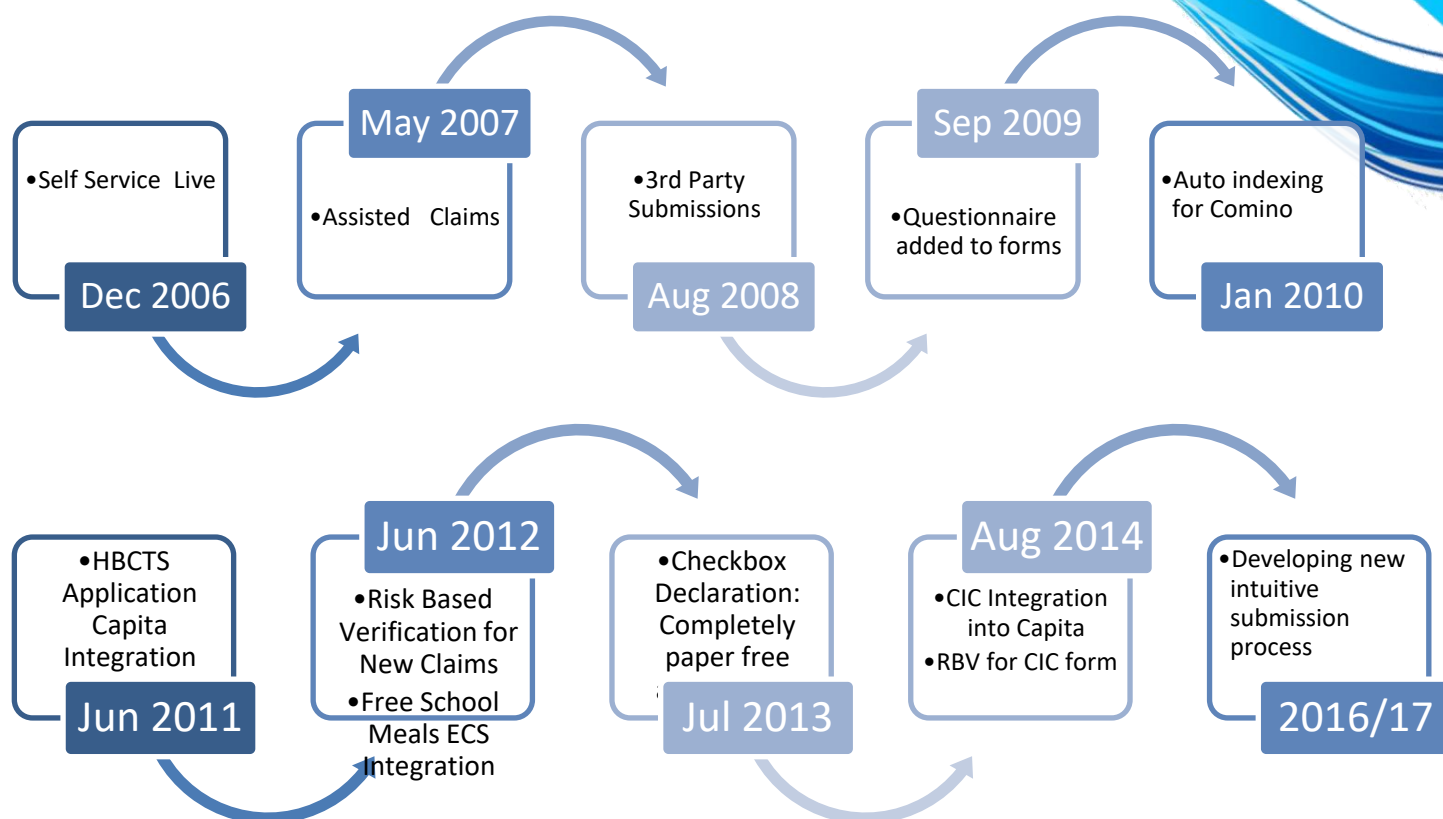
### Assisted Claims

Face-to-face assisted claims were made available at the Authority's Customer Service Centres located around the borough, shortly after self-service went live.

### Form Submissions



## Key Milestones



## Free School Meals

Free School Meals has been administered by the Benefits Service, since June 2010. The Free School Meals questions are incorporated into the HBCTS eForm but there is also a stand-alone eForm, where HBCTS is not being claimed.

In July 2012, Victoria Forms added integration with the Inland Revenue ECS service, to allow automated processing for Free School Meals applications. Customers are provided with an instant decision on their claim, and can print out a confirmation letter if entitlement is confirmed.

## Risk Based Verification

- In June 2012, Victoria Forms added Coactiva Risk Based Verification to the Waltham Forest application process. At the point of submission, application data is analysed and assessed. Using sophisticated data analysis, the system marks 50%+ of claims as low risk, which do not need evidence document checks. The dynamic in-form checklist adjusts accordingly to the risk score assigned to the applicant's form. We have developed a new submission process to allow a Risk Based Verification Evidence Checklist to be shown to the customer, this allows for the attachment of evidence directly to a claim form before final submission.



## Fully Automated Processes

### Intelligent Civica Comino routing

Waltham Forest has nearly 60 different document types. To assign these to the correct document management in-tray or individual officer is extremely time consuming. Victoria Forms provided an effective solution by including custom coding on the eForms.

Dependent on the type of eForm and submission channel, and answers to key questions within the form itself, a document type is automatically assigned when the eForm is imported to the Civica EDRM.

### Capita Academy Integration

In June 2011, Victoria Forms added integration for the main claim form with Capita Academy eStore. Data passes directly into Academy without the assessor having to re-key the information. In August 2014, this same process went live for Waltham Forest's change in circumstances eForm process, with more than 90% change reports fully automated within the back-office system.

## Customer Questionnaire

In September 2009, Waltham Forest began surveying customers to research benefit take-up, the ease of completing eForms and the comprehension of form questions. 75% of those who completed a claim form between August and October 2014 responded to the survey.

Of these 1381, 95% rated the overall experience of completing the online eForm as at least satisfactory; with 496 of those rating the experience as Very Good or Excellent. The answers are regularly analysed so that suggested improvements to the service and eForm can be made.

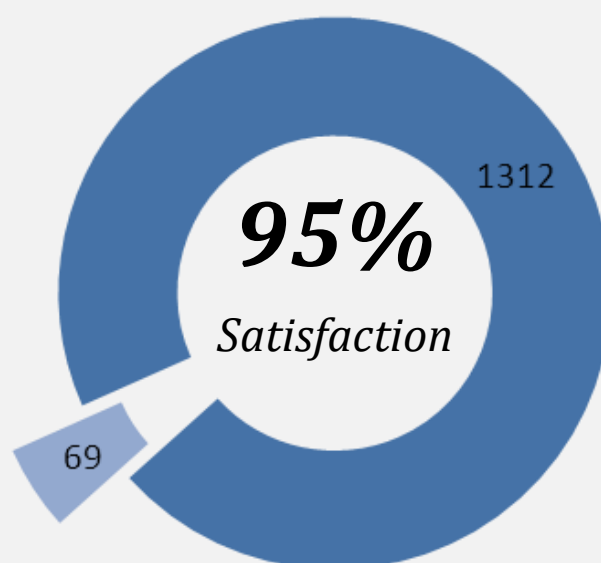
Some positive comments from the feedback below:

*"It was very convenient to fill it online rather than having to fill it on paper. Very futuristic!"*

*"All very straight forward and easy to use can't see how it could have been made easier."*

*"Highlighted areas made it easy to know which parts you needed to fill in."*

*"Easier and user friendly compared to the hard copy hand filled document which could be confusing; Easy to fill and submit without having to queue at the council office."*



(Survey Data, October 2014)