

Stockton-On Tees Borough Council

Process mapping and complex integrations in Revenues and Benefits

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Introduction

- Stockton
 - Tees Valley, North East
 - Population 192,000
 - Diverse region – differing needs

ACHIEVEMENT
AWARDS 2017
HIGHLY
COMMENDED **MJ**



- Emerging Digital Strategy
- Smarter Working Programme

Where we were

- Incoherent approach
- Mixture of forms packages – Ebase, .net, MCV
- Printable forms, callback forms
- SOCITM – often highlight lack of mobile compatible forms

What we've done so far

- Single Person Discount – live Sept 16
- Gradual release process for each form
- Full process review for each form
- 16 Rev's & Bens forms now live
- 2 corporate forms live
- CRM, Document Management & Payments integrations live

Where we are now

- 40% - 45% self service take-up on early forms
- Change of Address live Sept 17 – over 800 completed during Oct
- Over 5,000 Victoria Forms submitted since April 17
- Integration to Revenues system – scheduled Nov
- Integration to Benefits system – scheduled Dec

Integrations

- CRM – Lagan
 - Follows matching rules
 - Creates new customer
 - ‘Footprint’ created
- Payments – Pay.Net
- Document Management System - Information@Work
- Revenues – Civica - OPENRevenues
 - OPENChannel – Change of Address (move out of area)
 - Parameters – account ref / address / name
 - Ending liability
 - Creates account & set liability for new occupier
 - Dates future & past – rules & rejections
- Benefits System – Civica - E-Benefits
 - Matching rules – looking for existing claim or creating new
 - Claim date and Income / capital auto populated

Challenges

- “Some of the forms did not quite meet our needs and without changes there would have been an impact on our processes and also on our customers. Where possible, Victoria Forms have been happy to update the forms to our requirements.”
- “In hindsight, we feel the process may have been better if we had received training to enable us to update the forms at the beginning of the project and then we could have completed a lot of the changes ourselves and understood far better the actual capabilities of the forms.”
- “For me Victoria Forms need to be doing more around form integration through API’s etc. to help push the savings in local authority processing time.”
- “Personally I would like to see Victoria Forms develop the design software to give the users more flexibility when looking at the layout of forms. I believe that you tried to use the design software in Stockton but that it was very cumbersome. If simple changes in form design could be carried out by the end user it would cut the reliance on Victoria Forms to more of a support role.”

Positives

- Mobile compatibility
- Flexibility – forms for a number of different purposes, with a range of integrations (often integrating with problematic products!)
- “Always willing to help and assist us with the implementation/development of forms and with the integration of forms with our Revenues & Benefit system and our Document Management system .”
- “Any urgent issues have been dealt with quickly.”