



**Project Plan**

**Implementing eClaims at Epping Forest**

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Project Website: [www.victoriaforms.co.uk/dev/EppingForestClaimProject](http://www.victoriaforms.co.uk/dev/EppingForestClaimProject)

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# Forms Design and Selection

## New Claim Form

Victoria Forms will provide Epping Forest Council with access to the latest version of our Standard HB / CTR Claim Form; this will be available to view and test from the Project Website - link on page 1.

This is the latest Claim Form, which is currently in use with 20+ Local Authorities. It has been updated for April 2016 regulations / legislation.

Council staff should review the eForm to see if any essential amendments are required. It is recommended that for a quick implementation, only changes should be made where essential. Any changes requested will be completed quickly and the amended design made available for review on the project website.

Custom Forms design work is charged at our standard hourly/daily rates.

It should be noted that any divergence from our standard product will result in the eForm becoming a custom form, specific to Epping Forest Council. Custom forms give Councils the ability to reword questions and add / remove sections as they see fit, however, any future amendments to regulation / legislation would need to be managed by Epping Forest Council. With our standard design, regular updates for regulation changes and improvements will be made automatically, and Epping Forest Council can benefit from a form that has been tried and tested, and is constantly improving.

Further suggestions to improve our standard form are most welcome.

The style of our web form pages can be customised to match your Website and branding. Epping Forest Council and Victoria Forms will work together to a colour scheme which suits corporate policy.

## HB / CTR Calculator

The HB / CTR Calculator is also available to be tested. The initial calculator is provided using Government default values for April 2016 onwards. Epping Forest Council are advised to provide the parameters which match their Local Council Tax Support scheme. For April 2017. Upon receiving this data, Victoria Forms will then configure the calculator for this scheme. Epping Forest Council should try some test calculations to ensure that the output figures are accurate.

**Local values for parishes.**

Where CTax rates vary according to the parish of the applicant, the calculator can make use of a popup list of parishes, that feed hidden values back to the calculator, when the user selects a particular parish. This facility may be added to the calculator for the Council, at a small cost. Council staff are to advise on the requirements for this feature.

## Form Declaration – Signature Types

Depending on Epping Forest Council’s requirements, a signature / confirmation can be requested in three different ways:

* Handwritten Signature – Claimants will be asked to print the declaration page, sign it, and post it to Epping Forest Council’s Office. Form data is submitted as normal and the council must receive a signature from the Claimant within 4 weeks in order for it to be a valid claim.
* Esign – Claimants can use an electronic eSign pad or a smartphone or a tablet to provide an electronic signature.
* Checkbox signature – A confirmation box is provided on the form which Claimants must check to confirm they have read and agree to the declaration. The Chief Executive must sign and agree to this being the main method of obtaining a ‘signature’.

As discussed in the project initiation meeting, Epping Forest Council are to begin the necessary steps to have check-box signatures legally accepted. This feature can then be turned on as soon as Epping Forest Council has the DWP specified procedures in place.

## Additional Forms

Victoria Forms will make the standard Benefits form libraries available for review (Revenue forms can also be made available if required).

The same design guidance applies to these standard forms – essential changes can be implemented quickly but if Epping Forest Council decide to make major alterations then the forms will become custom versions and will require Council driven legislation / regulation updates, and there is a cost for the design work.

If there are any forms used by Epping Forest Council that are not in the current eForms libraries, Victoria Forms can design a standardised version of these at no additional cost - Victoria Forms will then make the new form available to other customers.

## Change in Circumstances Form

The Change in Circumstances form facilitates the automatic update of records for the numerous changes to household members and income a Local Authority receives every day. In addition to the most commonly reported changes, Victoria Forms' advanced HB / LCTS Change in Circumstances eForm also covers less frequently reported changes in detail, ensuring the whole spectrum of change reports are subject to automation efficiencies.

This form is available for review via the Project Website, so that Epping Forest Council can identify any essential design changes if required.

# ONLINE EVIDENCE SUBMISSION

The Victoria Forms system has the facility for files to be attached to forms. This facility can be turned on for individual forms. When attached, image files appear as additional pages within the form PDF produced at the end of the submission process.

# Hosting, Website and Branding

## Solution to be hosted by Victoria Forms

Victoria Forms will provide hosting of Epping Forest Council’s application on secure servers – claimants will be directed to the application through links on Epping Forest Council’s website.

### Setup

The setup will consist of two versions of the online forms application:

* Live Version
* Test Version

Note: In order to limiting access to the hosted system for Epping Forest Council users only, Victoria Forms will need to be provided with a list of Council IP addresses.

## Website

In preparation for the introduction of self-service eForms, Epping Forest Council staff should prepare an update to the relevant department web pages; this update should include adding ‘*Apply Online’* links that will take customers to public eForms. Victoria Forms will provide the necessary code for these links once the forms have been installed on the application.

Epping Forest Council may also wish to update / create information pages on the website to provide additional guidance on eForm use.

## Viewer / Form Branding

Victoria Forms will designa custom form viewer interface for a greater continuity of corporate style when customers access eForms from Epping Forest Council website, and add a style sheet for the design form pages to match the style of the website.

Samples of this will be placed on the development site, and Council staff may advise on any changes required.

## SMS Gateway

Enterprise Forms Server provides the facility for public users to save part-filled forms on the server. These are retrieved with 12 character reference codes. These can be sent by SMS text message to the user’s mobile phone. To use this facility Epping Forest Council will need to setup a separate account with Clickatel.

# Northgate Document System Integration

## For Victoria Forms Hosted Solution

Integration with the Northgate Document system can be achieved in phases.

From the start of the project, the system will be usable in a live environment with forms being placed into the Northgate system without printing and scanning. Subsequent phases (below) can come after the initial go-live if required.

### Phase 1: Manual Indexing

The hosted system will be configured to generate a notification email to an appointed administration team in Epping Forest Council when a form is submitted. Authorised staff members may log in and download a PDF version of the form to their desktop. This file can then be uploaded to the Northgate/Anite document system and indexed manually.

### Phase 2: Partially Automated Integration

Victoria Forms will supply a custom “go-between” program which will further automate the process.

The code, installed on a Epping Forest Council server will periodically connect to the hosted Enterprise Forms Server, and move the PDF files across to the Epping Forest Council internal network. Staff can monitor this folder and then upload the files to the Northgate system.

For this option Epping Forest Council is to provide a Windows server that can connect to the Victoria Forms hosted system. This can be a shared server if required.

Ideally Victoria Forms technicians will be provided with remote access to this server.

### Phase 3: Fully Automated Integration

Where Epping Forest Council purchases Northgate’s Generic Importer add-on, the forms process can be fully integrated. The Victoria Forms software will save additional indexing information along with each form PDF, in a monitored folder by the Northgate system.

On completion, forms will automatically be passed from the hosted Victoria Forms system into the Anite system, without user intervention.

Epping Forest Council should specify the structure of the indexing file according to the way that Anite Generic Importer Module is setup to read.

To ensure that the Anite importing is working correctly, and that the indexing file structure works as expected, Epping Forest Council should test this with PDF form files moved manually into the Anite folder, along with indexing files created in notepad.

Victoria Forms can provide contact details of reference sites that have done similar work and details of how index files are created at these sites, if required.

# Training

Victoria Forms will provide access to the eForms system and provide associated manuals so Epping Forest Council staff can gain familiarity with the system.

A member of staff from Victoria Forms will arrange to visit to provide training for key staff in the use of the system and eForms themselves. Training covers:

* System Admin training – which will show the back end of the system. This includes configuring forms, branding, managing users etc.
* End User training – which will show the eForm as a customer would see it. The form and all its features will be demonstrated.

The training is typically conducted under a *train the trainer* approach – training for end users may then be tailored by Epping Forest Council to take account of internal processes and ways of working.

# Testing / Piloting

With a good working knowledge of the Victoria Forms system, Epping Forest Council staff can complete test eForms and ensure that all processes are working as required. The initial testing can be done with test cases and be built up to running live cases in low volume.

Victoria Forms staff will be available to respond and take quick action to any issues highlighted during the testing period.

# Go Live

### Planned for 4-8 weeks after.

The system will be working and tested with low volume live claims prior to the planned go live date. Initial discussions lent towards plans of going live with internal use first, included telephone claims and assisted claims at Council contact centres / phased implementation – where the online form would be available for use to reduce paper applications, and then introduction of Automated Integration afterwards.

When going live with forms via the corporate website, the pages that contain links to forms from Epping Forest Council website can be turned on when needed.

Access to eForms can also be made available to staff and partner organisations.

The rollout of online forms can be achieved in parallel with Epping Forest Council’s own change in admin processes. Different methods of using eForms use can be adopted as and when this fits in with Epping Forest Council’s own way of working.

Victoria Forms will be available to provide ongoing help and support if any issues arise after going live.

# Offline Forms

Victoria Form's offline eForms capability can be enabled by the local installation of the application module on a Windows laptop, Notebook or Tablet.

This enables the remote use of all authorised offline eForms sanctioned for the given user, without any internet or network connection.

These eForms may be opened, filled, E-Signed, and saved, all while offline. Synchronisation of completed eForms occurs automatically when the user is next connected via the internet or Council Office network, to the Enterprise Forms Server.

This facility will be made available for staff, at a time of choosing by the Council.

# Future Development

 **Academy EStore Integration**

Direct integration with the Captia Academy system is not required at this stage of the project. This facility may be added at any point in the future.

## Additional Forms

Depending on the options, and with the application live and working well, it is easy to add additional forms which can be integrated into the Council’s document system if required. Please ask us about our eForms libraries.

If there are any additional forms required, for which Victoria Forms does not have an existing version, please inform us.

## CRM/Portal Integration

Victoria Forms provides a ready-made module to add integration to CRMs and Customer Portals. This product can be used with any CRM/Portal that has an open architecture.

### Implementing eForm pre-population

A Epping Forest Council or CRM/Portal developer will need to write some simple custom code to generate and format customer data, into a link within the customer account screen, which can call one of our application forms. The link should contain data which, our system will decode and use to prepopulate the requested form.

Victoria Forms developers can assist with this. However, please note, we may not have previous knowledge of the CRM/Portal system and how it works.

### Updating CRM customer record

Working with Epping Forest Council staff, our system will send messages to the CRM/Portal along with the date and time. This information will then appear in the customer history.

### More advanced interaction

On a form by form basis, it is possible to send specific information to the CRM/Portal, and also to initiate processes set up within the system. Further analysis may be required in this area.