

# 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 attached images and files.

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 displays the 'Demonstration Form' interface. At the top, there's a header with the Victoria Forms logo and navigation links like 'More resources' and 'Contact us'. Below the header, a toolbar contains buttons for 'Back', 'Select Page', 'Show Errors', 'Help', 'Print', 'Load', 'Save', and 'Submit'. A 'Case Info' button is also present. The main section features an 'Upload & Attach File' button, indicating '3 file(s) attached', and a 'Show / Hide Attachments List' button. A table lists the attachments:

Attachment Filename	Location	Action
Finance Documents:		
<a href="#">Bank Statement.tif</a>	Server (Temp)	<a href="#">Rename</a> <a href="#">Delete</a> <a href="#">Up</a> <a href="#">Down</a>
Identity:		
<a href="#">Passport.jpg</a>	Server (Temp)	<a href="#">Rename</a> <a href="#">Delete</a> <a href="#">Up</a> <a href="#">Down</a>
Rent Evidence:		
<a href="#">proof-of-residency-letter-from-landlord-1.png</a>	Server (Temp)	<a href="#">Rename</a> <a href="#">Delete</a> <a href="#">Up</a>

Below the table is the 'Evidence Request Form - Submit Evidence Documents Online'. It contains various input fields for personal information:

- Surname: Applicant
- Other Name(s): Example
- Any other names that you have used:
- Title: Miss
- Email Address: example@example.com
- National Insurance Number: AB123456A
- Reference Number:
- 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 'Attachments Configuration' window shows settings for document grouping and file type whitelist. On the left, under 'Document Grouping', 'Custom Groups' is selected. Below it, 'Custom Document Groups' lists 'Finance Documents', 'Identity', and 'Rent Evidence'. On the right, under 'Whitelist of Filetypes, Max Size', a list of allowed file types and their maximum sizes is shown:

File Type	Max Size
jpg	10000
pdf	10000
png	10000
gif	10000

# 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**

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**Lloyds TSB**

Statement number: 90  
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.co.uk  
Your branch: Accies Green - Birmingham

Sort code: 13-19-41  
Account number: 0800000000  
IBAN: GB25 1319 4100 0000 0000  
BIC: LLOYGB33

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	£1400.71	Monthly account fee	1	£3.00	
Balance on 15-Apr-2010	£1100.29	Other charges	1	£3.00	
Average credit balance	£1000.00	Total fees	4	£12.00	
Average debit balance	£300.00				

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	£3.00
Debit interest you paid on your average debit balance of £300	£3.00
Planned debit interest	£3.00
Unplanned debit interest	£0.00
<b>Total cost of your account including fees, debit interest and credit interest</b>	<b>£44.50</b>

Your Interest Rates	
Amount of credit balance	Credit balance
£0.00	£0.00
Amount of Planned Overdraft	Planned Overdraft
£0.00	£0.00
Amount of Unplanned Overdraft	Unplanned Overdraft
£0.00	£0.00
Amount of Overdraft	Overdraft
£0.00	£0.00

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

\*\*AER is based on Annual Equivalent Rate and illustrates what the interest rate would be if interest was paid and compounded once each year.

For credit interest, your summary of interest shows the amount of credit interest we paid you, as well as the credit interest you could 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 of 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.***

Exporting of attachments	No Export
XML Export	No Export
When XML Export occurs	Export as original files
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

## 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 235,000.

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 handled online, the simpler and more cost effective it becomes for staff to process each application.

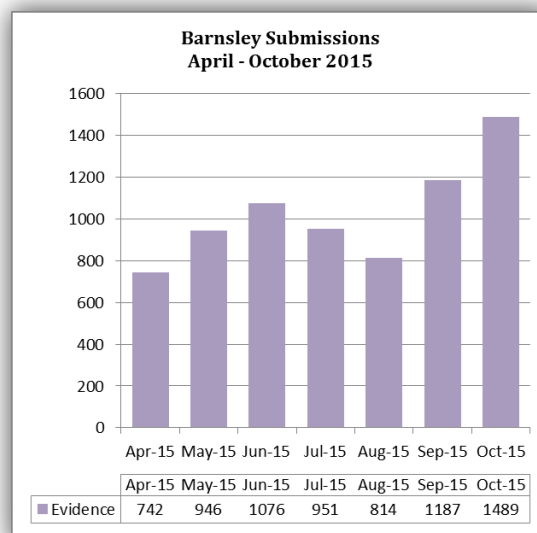
### Evidence Attachment eForm

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 around a quarter of all of Barnsley's received forms.

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.



## Customer Spotlight

### Wyre Council

Nestled in North West Lancashire, Wyre Council serves over 105,000 residents.

Wyre Council pioneered the use of the Evidence Attachment form by pairing the facility to upload evidence with their HBCTS custom letter, which is generated from data entered into the form. The letter offers personalised guidance for the claimant on how to complete their claim completely online, freeing up valuable staff resources.

*“ Recently we had a day when we didn't receive a single piece of benefits post via the Royal Mail – absolutely unheard of! When we checked we found 21% of our new claims are now being completed by claimants uploading their evidence. ”*

**Peter Mason**

**Head of Contact Centre, Wyre Council**

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

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

**01284 701000**

**[VicFormsSales@victoriaforms.co.uk](mailto:VicFormsSales@victoriaforms.co.uk)**

To find out more, please visit our website - **[www.victoriaforms.co.uk](http://www.victoriaforms.co.uk)**