A REVENUE MANAGER'S GUIDE TO

GOVTECH'S
webCAPTURE SERVICE

webCAPTURE

AT THE HEART OF CHANNEL SHIFT

Govtech's webCAPTURE Service

A successful channel shift strategy lowers costs by reducing traffic to customer service points and contact centres. But what about the Revenues Service?

Putting **webCAPTURE** at the heart of your channel shift plans also secures very significant productivity gains for the Revenues Service by automating processing in Northgate Revenues.

WHAT IS webCAPTURE?

webCAPTURE is a hosted service which fully integrates Council Tax and Non Domestic Rates web forms with Northgate Revenues and Benefits.

It works with any forms that produce XML in a Govtech specified format, or with its own web forms.

WHAT WILL IT DO FOR ME?

webCAPTURE transforms productivity in the Revenues Service.

Firstly, it automates around 80% of the manual processing that currently consumes staff time.

Secondly, it sorts the remainder into work queues, prioritising it according to the impact on Collection and Recovery.

With **webCAPTURE**, Revenues Officers work only on transactions that require their skills and expertise. This frees up their time for other priorities, so you get much more from them.

In Kirklees MBC, for example, 36 members of staff who were dedicated solely to Billing are today assisting with Recovery and an extra £1.2m was collected in the first 12 months.

> " *If your web forms merely create new work items for you to manually process then you're not getting all the benefits of Channel Shift* "

webCAPTURE
AT THE HEART OF CHANNEL SHIFT

WHY DO I NEED webCAPTURE?

Most web forms aren't integrated with Northgate Revenues in any meaningful way. Most have to be scanned, queued, analysed, legislative decisions made and then manually keyed into Northgate. Even partly-integrated forms don't save Revenues officers much time because they have to check what has been done before they can complete the remaining work.

If web forms are not fully integrated, you are not getting all the benefits of channel shift in the Revenues Service.

webCAPTURE integrates and fully automates virtually everything, up to and including Refunds or Credit Transfers which are completed after the account has been calculated, including any benefit adjustments. When **webCAPTURE** says it has completed a transaction, it means just that.

HOW DOES AUTOMATION WORK?

When a citizen (or a non-Revenues member of staff in a contact centre) completes a web form, the content is routed directly to the **webCAPTURE** processing centre. **webCAPTURE** validates the address and the parties involved, applies legislative and business rule checks and then breaks the service request down into a series of logical instructions. These are automatically passed to Northgate Revenues in sequence.

For example, Northgate Revenues does not have a Change of Address API; these transactions are too complex for a single interface. Instead, it has around 50 APIs. To automate a Move, **webCAPTURE** may use 21 of those APIs. Which APIs are called, in what sequence and what data they are given is entirely case specific. All of this is managed by **webCAPTURE** and, because the process is automated, it gets it right every time.

IS webCAPTURE RELIABLE?

In terms of provenance

- Croydon Council has used **webCAPTURE** for 3 years, integrated with its in-house web forms

- 15 other councils have deployed **webCAPTURE** in the last 12 months; some use Govtech's web forms, others use forms from Gandlake, Firmstep, Victoria Forms, etc.

- In 2014-15, Kirklees MBC submitted 50,000 CT and NDR transactions to **webCAPTURE**

- City of Edinburgh Council is currently submitting up to 200 Council Tax moves per day

You can therefore be confident that **webCAPTURE** is fully proven and reliable.

100%reliable

It's a **Service**

webCAPTURE IS A HOSTED SERVICE.

WHAT DOES THAT MEAN?

Firstly, there is no software to buy, no new technology to master and nobody logs in to **webCAPTURE**. The entire service is delivered over secure communication lines which link your web forms with **webCAPTURE** and Northgate Revenues. This makes **webCAPTURE** very simple and non-disruptive to deploy. We set it up and all you have to do is test it and then implement your publicity strategy as quickly as possible.

Secondly, delivering **webCAPTURE** as a service means you're effectively buying outcomes, not a technology solution. Govtech uses the technology to deliver the outcomes.

Our commitment is to capture, validate, process and load your CT and NDR transactions quickly, accurately and securely. When we do this, around 80% of the current manual workload will be automated and the balance sorted and loaded into prioritised work queues.

And, since it is a service, the pressure is on us to deliver the outcomes every day, so you'll want to keep it.

In summary, what you contract for with **webCAPTURE** is a service which automates around 80% of your day-to-day work every day and sorts the rest into prioritised work queues. Your officers get straight to work but only spend time on things that require their skills and expertise.

80%

Increase automation to reduce manual workload.

Outcomes

WHEN INTERVENTIONS ARE TRIGGERED, HOW ARE THESE SORTED AND CLASSIFIED?

Transactions processed by **webCAPTURE** acquire 1 of 9 potential classifications; Govtech uses these to internally analyse precisely what has occurred and enable a cycle of continuous improvement.

webCAPTURE automatically maps its classifications to 6 statuses in your document management system (DMS). One of the statuses is "Archive" meaning there is nothing for a Revenues officer to do or follow-up; the item has been completed in Northgate Revenues and closed in the DMS.

Your DMS can be configured with separate work queues for each status or, more typically, to route the other outcomes into High, Medium or Low priority work queues.

Items which "Failed" or were "Unmatched" (e.g. A Notification of Move In to a New Build property that has not yet been created in Northgate Revenues) would be treated as High priority.

Those generating "Follow-on Action" (e.g. an active Benefit claim is affected) or a "Notification" (e.g. Move not processed because it is more than "x" days in the future) may be assigned a Medium priority.

Other items, where transactions may have been processed and automated, but minor details were not completed (e.g. Move Out processed but contact email address supplied had an invalid format) would be assigned to Low priority, since the Authority may, or may not, wish to follow them up.

webCAPTURE auto-indexes into any DMS as long as the council has licensed a suitable API. Currently supported DMSs include Civica W2, Information@Work, Northgate Documents and ICLipse.

Outcome	Priority	Caseload
Archive	Ignore	88%
Review	Low	88%
FOAction	Low -> Medium	88%
Notification	Medium	9%
Failure	Medium -> High	1%
Unmatched	High	2%

Source: Islington 6 weeks up to 11th September - 4186 forms processed

Maximise **Automation**

HOW ARE THE OUTCOMES MONITORED?

Councils are given access to a secure online portal to run standard processing reports on demand.

In addition, Govtech itself monitors the levels of automation being achieved. It then works with councils to identify and implement rule changes which can safely drive up the levels of automation.

After going live in December 2014, Islington Council used the information Govtech provided to challenge everything it did. In one week during February 2015, Islington submitted 279 CT Moves to **webCAPTURE**. Of these,

- 78% (219) were completed

- 16% (44) were referred to Islington by business rule triggers. Many of these were also automated but

webCAPTURE noticed something else to which the council wanted its attention drawn, e.g. couple displaced by a Move Within have an active Benefit claim.

- 2% (6) were unmatched (address/liable party could not be matched in the Revenues system)

- 4% (10) "failed" e.g. An API returned an unpredicted response or error code; consequently, the transaction could not be fully automated and the Authority needed to complete it manually. These are reported to Govtech for high-priority analysis.

The 60 PDF renditions associated with the 60 non-completed items triggered above were loaded into prioritised work queues. In addition to detailing the actual service request, the renditions also explained to Revenues officers why intervention had been triggered.

WHAT AFFECTS THE **AUTOMATION RATES**?

webCAPTURE business rules control automation and trigger intervention by a Revenues officer. Some rules are mandatory and others discretionary, i.e. configured to suit local procedures. Discretionary rules are those which mainly affect automation rates. During the first few weeks, Govtech will highlight any specific discretionary rules which are preventing higher levels of automation. The information provided enables councils to analyse why they treat these specific items the way they do and what would happen if they changed the rules.

As a consequence of this analysis, councils invariably decide to change some rules.

webCAPTURE Now

WHAT TRANSACTIONS DOES **webCAPTURE** HANDLE?

webCAPTURE TRANSACTIONS	**COUNCIL TAX**	**NON DOMESTIC RATES**
Direct Debit Instructions	Yes	Yes
Single Occupier Discounts	Yes	N/A
Moves In	Yes	Yes
Moves Out	Yes	Yes
Moves Within	Yes	No
Unoccupied Discounts	Automatically triggered where applicable by CT Move	No
Refunds / Credit Transfers	Automatically triggered where applicable by CT Move	No
Copy Bill Request	Yes	Yes
Special Payment Arrangement	Yes	No
Single Occupier Discount Review / Cancel	Yes	N/A
Benefits Change of Address details captured on CT Move Within	Yes	N/A

webCAPTURE will continue to be enhanced in consultation with the **webCAPTURE** User Group.

Customer Service

CITIZENS EXPECT A **HIGH LEVEL** OF SERVICE FROM THE COUNCIL. WHAT WILL **webCAPTURE** DO FOR THEM?

Citizens get a better level of service when you deploy **webCAPTURE**.

There are no queues and no opening hours to consider. Govtech's web forms are simple and highly intuitive acting like an efficient interview, asking relevant questions only and getting all the information the first time round.

Citizens will also get a much faster response. If a citizen completes a Move In form on Thursday afternoon, the bill with DD payments is produced that evening, ready to send out. A completed Move Out or Move Within form leads to the adjusted bill, including refund request or credit transfer, being issued within days; just as soon as **webCAPTURE** has ensured the account is fully calculated, all payments have cleared and there are no other outstanding debts with the Council.

DO CITIZENS HAVE TO BE AUTHENTICATED, OR HAVE A SECURE ACCOUNT?

No. **webCAPTURE** has been designed to accept both authenticated and unauthenticated data from citizens. **webCAPTURE** validates every transaction it receives.

If your council does not yet have a secure citizen account facility, you can still deploy **webCAPTURE** now. When the citizen account facility is ready, **webCAPTURE** can be integrated with this with data from the citizen account pre-populating the web forms.

Make the most of the **Service**

CAN THE COUNCIL'S OWN STAFF USE GOVTECH'S WEB FORMS?

Yes. This is encouraged. A well designed suite of Revenues forms can act like a script, ensuring that non-Revenues staff who are fielding customer service requests collect all the required information at the first attempt. And, when they submit the form, the transaction will be automated. Getting council staff to use the forms helps to accelerate savings in the Revenues Service and, once council staff are confident with and competent in the use of the web forms, it is easier for them to encourage citizens to have a go themselves.

Just prior to releasing the Govtech web forms to citizens, Kirklees MBC used them to clear its own Revenues backlog by extracting this from the DMS and getting staff to key-in all the requests. Over 1,800 Moves were processed and automated in the first week.
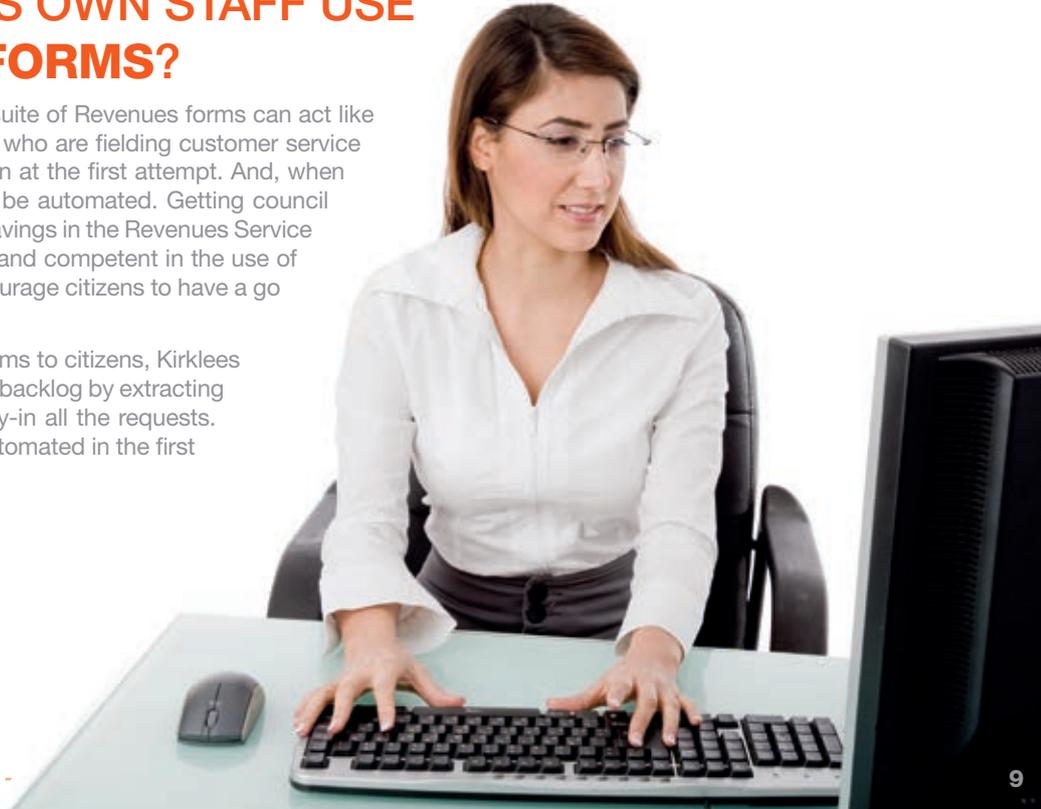
Keep **Informed**

DOES webCAPTURE INTEGRATE WITH CRM?

Yes, in a number of ways. **webCAPTURE** can accept content from web forms that are part of a CRM solution. Or, its own web forms can be deployed within a CRM solution.

webCAPTURE can also be deployed separately from a CRM but will create and update events in the CRM as web forms are submitted and processed.

CAN webCAPTURE UPDATE OTHER SYSTEMS?

Yes. This can be done as a blanket notification to other departments by **webCAPTURE**.

webCAPTURE can also use data from other systems to inform Revenues; for example, it could check for sundry debts as well as CT arrears and HBOs when someone is leaving the council area.

HOW MUCH DOES webCAPTURE COST?

webCAPTURE is a service, so you pay an annual service fee which is based on your CT Chargeable Dwellings, a published figure. There is no limit to the volume of transactions you can submit. Govtech's web forms are licensed on an annual term rental basis. However, **webCAPTURE** can accept information from any forms that can produce XML.

Supporting your **Business Case**

## CAN GOVTECH HELP WITH A BUSINESS CASE FOR webCAPTURE?

Yes. Govtech has a business case model which can be populated with simple data about your Revenues Service. It then calculates how much time is being consumed by manual processing and what this is costing. It presents the results in a way that enables you to sanity check the figures, simply.

It then enables you to model a gradual uptake in electronic self-service over a 5-year term and calculates the time you will save, the value of that time, the service fees you will pay and the net difference between these, year-by-year, over 5 years.

Govtech will then use this information to produce a written business case for you to review.

We began by saying that a successful channel shift strategy lowers costs by reducing traffic to customer and contact centres. Putting **webCAPTURE** at the heart of channel shift also secures very significant productivity gains for the Revenues Service by automating processing in Northgate Revenues.

Typically, a mid-sized council with 80,000 Chargeable Dwellings which achieves an online take-up rate of 50% in Year 1, 65% in Year 2 and reaches a plateau of 80% thereafter will free up around 25 man years, the net value of which is around £350,000 after service fees. Some Councils are exploiting the freed up resources to create a dedicated team to tackle long-standing arrears and/or to increase the current collection rate. In Kirklees MBC, for example, an extra £1.2m was collected in the first 12 months.
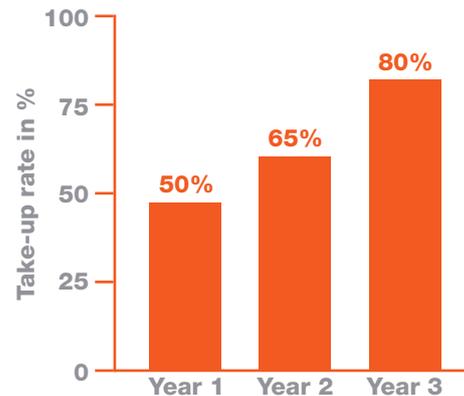
Channel shifting services is a journey. The business case must reflect this.

To request a business case model for your council, arrange a demo, join one of our Customer Open Days or for any other information, please contactus@govtech.co.uk

Our **People**

ANDREW MELVIN

MANAGING DIRECTOR

Andy heads up the company and oversees sales, marketing and business partnerships.

MARK HANSON

TECHNICAL & CUSTOMER SERVICES DIRECTOR

Mark is responsible for IT, security, communications, customer project delivery and customer satisfaction.

GRAEME MAYCHELL

PRODUCT MANAGER

Graeme looks after the development of the webCAPTURE Revenues product to support delivery of a first class service.

ALAN HINCE

CLIENT MANAGER

Alan looks after all things Revenues related. This includes new implementations, customer support and general guidance on best practice.

TIM FRIERY

SERVICE ENGAGEMENT CONSULTANT

Tim supports customers through their implementation projects, making sure it's all as painless as possible.

THE TEAM

Over 30 staff supporting our services in various development, technical and support roles.