

CAPITA



CAPITA Revenues & Benefits Training & Consultancy Services

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Introduction

The faster, easier, better way to learn. Experience the benefits of Capita training with structured, tailored courses and consultancy services which help you make the most of the Capita Revenues and Benefits applications.

The integrated and complementary Capita Revenues and Benefits application suite consists of Capita Council Tax, Capita Benefits, Capita Business Rates, Capita Payments and Capita Overpayments. Additionally, your authority may be utilising further modular applications such as Capita Mobile, Capita Business Connect, Capita Decision Support and the Quality & Assurance Module.

The Capita Revenues and Benefits applications are therefore an integral aspect of your authority's workaday administration. In the ever-changing world of Local Government, Capita has an ongoing commitment to improving the service we provide to our increasing customer base.

Our software is developed to provide optimum functionality, whilst remaining simple-to-use rather than simplistic. The more effectively and efficiently you are able to use the software, the more it will contribute to the success of your authority.

The dedicated team of Capita Business Consultants is able to assist you on all manner of issues, from a single day's consultancy or training to larger business processes which may require a program of change.

Whatever method you require, you can be guaranteed that you will receive the highest quality professional service from Capita. Our Business Consultants are all former Local Government Practitioners who readily appreciate the pressures facing authorities and are therefore best placed to advise you.

All the courses and services contained herein are designed to meet the needs of your business.

Courses held at Capita's Offices

Capita's offices are located in the centre of Trowbridge, the County Town of Wiltshire. Trowbridge is well connected by rail and is approximately 20 miles south of the M4 (junctions 17 or 18).

Whilst visitor parking is strictly limited and should be arranged in advance, several Pay & Display car parks are within a short distance of our offices. Should delegates require overnight accommodation, please contact your Account Manager/ Project Manager for recommendations, if you have special requirements or if you would like accommodation to be arranged for you.

Capita retains a comfortable and fully air-conditioned Training Suite and lunch can be provided as required. If lunch is to be provided, please ensure Capita is notified of any special dietary requirements beforehand.

All courses are designed for six delegates and run from 10 am to 4 pm, with an hour for lunch and mid-morning and mid-afternoon breaks. On the first day, delegates

should arrive by 9.30 am for refreshments and registration before the formal instruction commences at 10 am.

Booking Forms and Course Evaluation Forms can be found at the end of this document.

Courses held on-site

Courses are designed for six delegates and run from 10 am to 4 pm. On the first day, the Consultant will arrive at 9.30 am for introductions. However, Capita will endeavour to accommodate exceptions to the above. Please contact your Account Manager/ Project Manager regarding any special requirements.

For training courses run on-site, the Authority will be responsible for the training facilities. In order to achieve the most from the day(s) on-site, the following will be required:

- A Training Room to accommodate six delegates and the Trainer;
- PCs for each delegate and the Trainer, with the appropriate Capita applications installed as at the latest release;
- Overhead Projector (if required);
- Flip chart/ white board and pens.

Booking Forms and Course Evaluation Forms can be found at the end of this document.

Preparation Required for Consultancy Days

A Capita consultancy day can address specific requirements you have in more depth and can be tailored to meet your specific needs. The Consultancy Booking Form enclosed should be completed with the requirements of the day.

A copy of this document should be forwarded to your Account Manager/ Project Manager a minimum of one week in advance of your agreed date. Your Account Manager/ Project Manager will subsequently forward the document to the relevant Consultant or otherwise discuss your requirements with them. This document is not a guarantee of work that will be completed but rather functions as a guide to the Consultant as to the structure of the day.

Upon receipt of the document the Consultant will evaluate the Customer's requirements and liaise with the Account Manager/ Project Manager as required.

The Capita Consultant will be on-site at 9.30 am and will work until 4.00 pm, including an hour for lunch. By 4.00 pm the Consultant will prepare a short report of the work completed which should be agreed and signed by both parties before the Consultant leaves, unless such a requirement has been waived or the needs of the day do not necessitate a formal report.

Should there be any issues outstanding at the end of the day, the Account Manager/ Project Manager should be contacted to agree the appropriate action. Sample Consultancy Evaluation Forms are contained at the end of this document.

Additional Information

All prices quoted herein are correct at the time of publication but Capita reserves the right to alter published prices without prior notice.

For courses delivered on-site rather than at the Capita offices, Consultant(s)' expenses are not included and are chargeable to the Customer.

Variations in pricing are dependent upon elements including (but not limited to) the development required to modify and/ or develop courseware for an authority's specific needs, the number of delegates, the duration, the location or the need for preparatory/ remedial actions.

Such exceptions/ remedial action(s) will be notified in writing prior to the commencement of a training course/ on-site consultancy.

Any booking cancelled with less than five working days' notice is chargeable at the full value of the course.

Should you have any additional requirements or have any questions regarding anything contained within this pack then please contact Michelle Tyler, Professional Services Manager:

☎ 08701 631814

✉ Michelle.Tyler@capita.co.uk

Alternatively, please contact David Holloway, Business Consultancy Team Leader:

☎ 07717 511524

✉ DHolloway@capita.co.uk

BIMP - Introduction to Capita Benefits

Duration Three Days

Cost Available upon request

Course Description

This course is designed for all Benefits staff who will use the application to decide a claimant's entitlement to Housing Benefit &/or Council Tax Benefit and can benefit Customer Service/ One Stop Shop staff by providing an overview of the application.

It covers those frames and functions most commonly used in the workaday assessment of Housing Benefit &/or Council Tax Benefit entitlement, including Changes of Address/ Tenure, Alternative CTB/ 'Better Buy', Underlying Entitlement, non-qualifiers and the Local Housing Allowance.

Additionally, attendees will cover claims from the self-employed and students, claimants with transitional protections and late notified changes.

A new **fourth** day has been introduced to cover more advanced aspects of Benefits Administration such as returned cheques, database integrity and how to amend assessment, transaction(s) and/ or statistical records (see BIMPADV).

However, this course does not fully cover the Verification Framework or Interventions. Please refer to the separate VF/ Interventions and Fraud/ SAFE course descriptions for further details.

Prerequisites

Familiarity with keyboard/ mouse; attendance on other courses is not required.

Key Topics

- ◆ Exploring/ Personalising the Desktop;
- ◆ Creating a new benefit claim;
- ◆ Commencing a benefit claim;
- ◆ Adjusting a benefit claim;
- ◆ Cancelling a benefit period;
- ◆ Change of Address/ Tenures;
- ◆ Old and New Scheme Tenancies, including CRR/ LRR/ SRR, LHA and Protected Groups;
- ◆ Local Housing Allowance;
- ◆ Other Transitional Protections;
- ◆ First & Last Day of Entitlement;
- ◆ Local/ Model Scheme Awards;
- ◆ Adjusting CTB following award/ removal of discount/ exemption;
- ◆ Non-HRA Homeless claims/ subsidy implications;
- ◆ Late-notified changes;
- ◆ Raising Overpayments/ Excess CTB;
- ◆ Automated Overpayment Subsidy Classification;
- ◆ Ongoing Recovery of Overpayments;
- ◆ Underlying Entitlement;
- ◆ Payment Errors and Change in Detail Statistics;
- ◆ Non-Qualifier Assessments.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend?

Benefit Assessment/ Decision Officers responsible for the workaday administration of Housing Benefit/ Council Tax Benefit.

It is intended that these first three days are geared toward Assessment/ Pre-Assessment Officers whilst the fourth day is primarily intended for Senior Assessment Officers *et al.* (see BIMPADV).

Authorities with sizeable Training/ Policy Sections may wish to ensure that this course is initially delivered to appropriate staff, followed by further sessions for all staff.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Be able to navigate around the Capita Benefits application;
- ◆ Be able to search for a claimant's details, utilising various parameters including fuzzy/ wildcard searches;
- ◆ Be able to create Incomplete or Correspondence-Only claims where the claimant does not already exist within the Benefits application;
- ◆ Be able to refer a claimant's details to the Rent Officer Service following a claim or Pre-Tenancy Determination;
- ◆ Be practiced in all of the more common frames needed for the assessment of benefit claims;
- ◆ Be able to make notebook/ diary entries;
- ◆ Be able to commence or adjust benefit claims;
- ◆ Be able to cancel benefit periods where appropriate;
- ◆ Be able to record Payment Errors/ Change in Details statistics;
- ◆ Be able to perform Changes of Address or tenure types (e.g. CT to PT);
- ◆ Be familiar with Alternative CTB and 'Better Buy' assessments;
- ◆ Have an understanding of national and local scheme disregards;
- ◆ Have an understanding of the importance of Income Codes/ Income Types;
- ◆ Have an appreciation that claimants generally retain Claim/ Council Tax/ Payments & Overpayments Reference Numbers/ Identifiers;
- ◆ Be able to navigate the more common Council Tax frames, e.g. to identify Single Person Discounts etc.;
- ◆ Be able to undertake Underlying Entitlement adjustments (where HB/CTB has ceased entirely or where HB/CTB and UE co-exist);
- ◆ Have an understanding of some of the main Benefits batch program routines, e.g. payment runs and Claims Marked for Reassessment;
- ◆ Be in a position to impart their knowledge to other team members.

BIMPADV - Advanced Introduction to Capita Benefits

Duration One Day

Cost Available upon request

Course Description

This course has been designed for all senior Benefits staff (such as Managers/ Team Leaders, Training Officers and Control/ Subsidy Officers) and is designed to complement the Introduction to Capita Benefits course (above).

This course is intended to cover more advanced aspects of Benefits Administration such as returned cheques, database/ subsidy integrity and how to amend assessment, transactions and/ or statistical records.

Prerequisites

Familiarity with keyboard/ mouse; prior attendance of 'BIMP Introduction to Capita Benefits' or prior experience of Capita Benefits.

Key Topics

- ◆ Uncashed/ Returned Cheques;
- ◆ Amending Assessment & Transaction lines;
- ◆ Amending System Totals;
- ◆ Amending Change in Details Statistics;
- ◆ The Event Log/ Audit Trail;
- ◆ Claim Integrity;
- ◆ Backdating Authorisation;
- ◆ HB on Two Homes;
- ◆ Discretionary Housing Payments;
- ◆ Blameless Tenant Recovery;
- ◆ Non-Recoverable Overpayments;
- ◆ Writing Off Overpayments;
- ◆ Overview of Benefit parameters, including user access restrictions;
- ◆ Manual Postings.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Managers/ Team Leaders, Senior Assessment/ Decision Officers, Training Officers, Control Team Officers.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Have an understanding of the more common system parameters, designed to give attendees a sense of ownership of the application;
- ◆ Have an understanding of access-restricted frames and functionality, enabling them to correct others' mistakes or to make material changes to transaction subsidy/ destination information;
- ◆ Be able to perform other commonly restricted procedures, e.g. write offs/ manual postings.

BTAD - Introduction to Capita Benefits Templates

Duration One Day

Cost Available upon request

Course Description

The Capita Benefits application produces a plethora of system generated correspondence, including decision letters, suspension notifications and notifications of visits/ shortened review forms in addition to the ability to produce *ad hoc* templates/ pro formas such as further information requests, memos and so forth.

This course explores the means of customising or creating documents and paragraphs to enable your Authority to meet its specific needs, and can cater for sites with or without Electronic Data Management Systems, sites requiring combined notifications, sites requiring dual-language notifications and sites requiring a means to identify documents for translation/ Braille or large print purposes.

This one-day course provides attendees with the knowledge to update and maintain document templates, where necessary using examples from the Capita Benefits application. The course employs demonstrations and workshops to reinforce the course content.

Prerequisites

Familiarity with keyboard/ mouse; prior attendance of 'BIMP Introduction to Capita Benefits' or prior experience of Capita Benefits will be assumed.

Key Topics

- ◆ Key application features/ functionality;
- ◆ Command language used in templating;
- ◆ Standard Capita Templates;
- ◆ Customised Templates;
- ◆ Documents & Paragraphs;
- ◆ Fixed Text & Variable Text;
- ◆ Other locally-set parameters.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Any individual(s) responsible for developing and/or maintaining (or requiring an overview of) Capita Benefits Templates. Technical staff are welcome to attend, but the course's emphasis is geared toward content rather than technical configuration (e.g. printer settings).

What Attendees Will Learn

How templates work and the creation and maintenance of documents and paragraphs within the Benefits application.

FRAUD - Introduction to Fraud/ Fraud + Modules

Duration One Day

Cost Available upon request

Course Description

This course is designed to benefit individuals tasked with adjudicating on Fraud/ Non-Residency cases, Fraud Managers/ Designated Fraud Officers and Benefits Managers/ Training Officers where Assessment/ Decision Officers will be required to complete on-line fraud referrals.

As the Fraud Modules are largely governed by locally-set parameters and Authorities' structures vary, careful consideration should be given to who should attend this course (see below).

The first half of the day will generally be given over to providing an overview of parameters and the varying methods available for configuring the Fraud or Fraud + Modules*, particularly in terms of access restrictions, whereas the second half of the day will generally be given over to the modules' on-line functionality, i.e. as used by Adjudication Officers/ Designated Fraud Officers.

* Capita's Fraud Module is available to all Authorities utilising the Capita Benefits application; the Fraud + Module features additional functionality and reporting enhancements and is separately chargeable.

Prerequisites

Familiarity with keyboard/ mouse; prior attendance of 'BIMP Introduction to Capita Benefits' or prior experience of Capita Benefits are desirable but not essential in the case of Adjudication Officers.

Key Topics

- ◆ Completing a new Fraud Referral;
- ◆ Risk Analysis;
- ◆ Recording Actions/ Outcomes and Recommendations;
- ◆ Permissions/ Access Restrictions;
- ◆ Adjudication, including subsidy and notification;
- ◆ Other Benefit parameters of interest to Fraud Sections;
- ◆ The Module's Management Information batch program suite.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Authorities may consider the following for attendance:

- ◆ Fraud Manager/ Senior Designated Fraud Officer(s);
- ◆ Designated Fraud Officer(s);
- ◆ Benefit Manager/ Adjudication Officer(s);
- ◆ System Administrator (as regards access restrictions/ parameters).

Please contact your Account Manager/ Project Manager if you are in doubt as to who

should attend.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Be able to complete a new Fraud Referral;
- ◆ Be able to progress an investigation, record actions/ visits etc.;
- ◆ Be able to record conclusions/ recommendations for Adjudication Officers;
- ◆ Be familiar with access restrictions/ permissions related to Fraud Module;
- ◆ Have an understanding of the batch program suite accompanying the Fraud Module;
- ◆ Be aware of the locally-set parameters governing the operation of the Fraud Module;
- ◆ Be aware of other parameters within the Benefits application which may be of benefit to Fraud Officers (e.g. landlord/ employer codes, circumstance codes, notification sources, suspension reasons).

BSAD - Introduction to Subsidy & Reconciliation

Duration One Day

Cost Available upon request

Course Description

This course covers the seminal Benefits batch programs HB6800 Subsidy Integrity Check and HB7150 CTB Balancing, with particular emphases upon understanding and resolving imbalances/ integrity errors and preventing future occurrences.

The HB6800 Subsidy Integrity Check details integrity errors caused by invalid combinations of subsidy indicators in addition to identifying discrepancies between the application's cumulative system and transaction totals, whilst the HB7150 CTB Balancing program details any discrepancies between the cumulative amount of CTB transactions and postings within the Benefits application.

Both reports are therefore crucial in minimising the time spent by Authorities balancing and reconciling integrated applications or ensuring that individual subsidy cells report anticipated values.

As such, this course is particularly recommended for new sites, for existing sites to assist in resolving subsidy integrity and CTB Balancing errors prior to the commencement of End of Year processes or for all sites to assist in resolving subsidy integrity and CTB Balancing errors prior to the submission of DWP Subsidy Claims.

However, as both reports are cumulative by financial year and are recommended to be investigated and resolved on a regular basis in order to minimise integrity and balancing errors towards End of Year or the submission of your subsidy claim, this course is suitable at any time during the year. Please refer to Training Methods, below.

Prerequisites

Familiarity with keyboard/ mouse; prior attendance of 'BIMP Introduction to Capita Benefits' or prior experience of Capita Benefits, particularly as regards balancing, reconciliation or subsidy claim.

Additionally, whilst most integrity errors may be rectified *via* on-line frames, the Consultant will normally require access to an emulator, e.g. Telnet, Ewan, PuTTY etc.

Key Topics

- ◆ Possible causes of integrity/ balancing errors;
- ◆ Amending/ Appending or Deleting Subsidy and Transaction records;
- ◆ Amending/ Appending or Deleting CTB Postings within the Benefits application;
- ◆ Uncashed/ Returned Cheques;
- ◆ Amending/ Appending or Deleting Assessment Lines;
- ◆ Amending System Totals;
- ◆ Appending CTB postings within the Council Tax application;
- ◆ Recoverable and Non-Recoverable Overpayments;
- ◆ The Event Log/ Audit Trail.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices. Where the course is delivered at Capita's offices, attendees will utilise a training database, giving them the opportunity to progress through worked examples.

However, it is anticipated that Authorities would prefer the course to be delivered on-site, using a test/ training database in order to work through examples specific to your caseload.

As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Anyone responsible for balancing, reconciliation and the completion of the DWP Claim Form. This course also covers the creation of manual CTB postings and may therefore necessitate the attendance (for part of the course) of Council Tax staff responsible for such postings.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Have an understanding of how to investigate and resolve integrity and/ or balancing discrepancies;
- ◆ Be familiar with key on-line frames permitting the amendment, deletion or creation of assessment, transaction, subsidy and posting records;
- ◆ Have an understanding of the importance and effect of one or both batch programs;
- ◆ Have an understanding of Capita's on-line subsidy routines.

SUBSIDY - Subsidy Completion Service

Duration 2-3 Days

Cost Available upon request

Description

Completing the annual subsidy claim is a time consuming and demanding task. It requires both expert subject and system knowledge to ensure subsidy claim amounts are maximised and that qualification is avoided.

Having balanced and reconciled hundreds of subsidy claims, and possessing an intimate knowledge of the Capita Revenues and Benefits solution, our Consultants are ideally placed to assist you reconcile your subsidy claim.

Capita Revenues and Benefits Consultants complete many subsidy claims each year, securing a wealth of experience and process understanding. Most importantly they are experts in the Capita Revenues and Benefits system and have directly influenced and tested recent subsidy developments.

It is this experience and system knowledge that allows Capita Consultants to excel, making them an excellent choice when it comes to helping you complete your claim.

Prerequisites

Ensuring that the database integrities are cleared down.

Key Topics

- ◆ Balancing Subsidy to Expenditure
- ◆ Completion of DWP form.
- ◆ Balancing Expenditure Discrepancies;

Methods

The Consultant will utilise the latest Capita Balancing Spreadsheets and Subsidy Batch Program.

Who Should Attend

It is advisable that those responsible for the Subsidy Claim are available.

What You Will Gain

- ◆ Knowledge of how to balance Expenditure to Subsidy;
- ◆ A fully completed Subsidy Claim form for submission.

BPARAM - Benefits Parameter Clean-Up & Data Cleansing Service

Duration One Day

Cost Available upon request

Description

This Service is designed to cleanse out-of-date or invalid parameters from the Benefit Application, in line with the Local Authority's requirements. It will also ensure that the current parameters are correct and investigate if the Local Authority is utilising the full available functionality.

Prerequisites

Access to back end application.

Key Topics

- ◆ Benefits Division Maintenance;
- ◆ Parameter frames.

Methods

The Consultant will work with the Local Authority to identify any out-of-date or invalid parameter settings. If any are required to be removed then the Consultant will do this.

Who Should Attend

Authorities may consider the following for attendance:

- ◆ Benefit Manager/ Adjudication Officer(s);
- ◆ System Administrator (as regards access restrictions/ parameters).

What You Will Gain

- ◆ A fully cleansed database in line with the Local Authority's requirements.

VICTER - Introduction to VICTER

Duration Half Day

Cost Available upon request

Description

This course has been designed for all Benefit staff that use the application to decide a claimant's entitlement to Housing Benefit and use the VICTER interface for referring rents to The Rent Service (TRS) to determine eligible rent.

It covers those frames and functions most commonly used in the workaday assessment of Housing Benefit entitlement, such as Rent Officer Determinations, Pre-Tenancy Determinations, Re-Determinations and related batch programs. This course also incorporates the Local Housing Allowance.

The electronic interface is used to produce detailed shadow referral reports to TRS as well as electronically referring pre-7th April 2008 cases and receiving/ inputting decisions electronically.

Prerequisites

An installation of the VICTER interface, if not already installed. Prior experience of the Capita Benefits application including system and parameter settings. Knowledge of Rent Officer batch programs and experience of the Rent Officer Module would be beneficial but not essential.

Key Topics

- ◆ System/Parameter settings;
- ◆ Impact upon business processing;
- ◆ System interaction;
- ◆ Batch programs, as appropriate.

Consultancy Methods

This course will be delivered on-site.

Attendees will utilise a VICTER testing database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Any staff involved with the interface, users who input Rent Officer decisions and anyone using the Rent Officer batch programs.

What You Will Gain

A detailed knowledge of how the interface interacts with TRS. Users will be able to refer a claim to TRS using the VICTER interface and input decisions received electronically. Users will understand its relation to Local Housing Allowance (LHA) and be able to produce detailed reports for TRS.

EBENSYS - eBenefits *Powered by ASSERT* **System Administration Training**

Duration Half Day

Cost Available upon request

Course Description

This course is designed for System Administrators *et al* who will have workaday responsibility for the ongoing administration of the Authority's eBenefits application, including managing Assessor Accounts and system configuration.

Course delegates may also wish to attend the eBenefits User Training and eStore User Training courses, detailed separately.

Prerequisites

Familiarity with keyboard/ mouse; prior attendance of 'BIMP Introduction to Capita Benefits' or prior experience of Capita Benefits is desirable.

Key Topics

- ◆ Agency Settings;
- ◆ Auditing;
- ◆ Export Settings;
- ◆ LHA Maintenance;
- ◆ Creating Users;
- ◆ Templates;
- ◆ Self Service;
- ◆ Archiving.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all of our courses, comprehensive training documentation will be provided.

Who Should Attend

Authorities may consider the following for attendance:

- ◆ System Administrators;
- ◆ Relevant users who will have privileged access to the applications enabling them to manage Assessor Accounts and amend configuration settings.

Please contact your Account Manager/ Project Manager if you are in doubt as to who should attend.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Be able to set up Agencies;
- ◆ Be able to assign Security Delegations;
- ◆ Be able to amend Question Commentaries;
- ◆ Be able to set up Mobile Working (if applicable);
- ◆ Be able to Archive;
- ◆ Be able to amend Document Templates.

EBEN - eBenefits *Powered by ASSERT* **User Training**

Duration One Day

Cost Available upon request

Course Description

This course is designed for any user who will be assisting customers in the completion of the eClaim form in order to determine the customer's entitlement to Housing Benefit and/ or Council Tax Benefit.

The course will enable delegates to gain the necessary skills to navigate through the eClaim form, to generate documentation and to undertake High Level Eligibility Assessments, before finally passing the processed application form through to the Capita eClaim holding area, known as eStore.

Course delegates may therefore also wish to attend the eStore User Training course, detailed separately.

Prerequisites

Familiarity with keyboard/ mouse; prior attendance of 'BIMP Introduction to Capita Benefits' or previous experience of Capita Benefits is desirable but not essential.

Key Topics

- ◆ System Buttons, Toolbar and Symbols;
- ◆ Customer Details;
- ◆ eClaim form;
- ◆ High Level Assessments;
- ◆ Generating Documents;
- ◆ Calculating Entitlement;
- ◆ Mobile Assessments;
- ◆ Transition of eClaim to Capita eStore.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices. Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all of our courses, comprehensive training documentation will be provided.

Who Should Attend

Authorities may consider the following for attendance:

- ◆ Assessment/ Decision Officers manning frontline services;
- ◆ One Stop Shop/ other front line officers including Welfare Officers.

Please contact your Account Manager/ Project Manager if you are in doubt as to who should attend.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Be able to navigate and progress through the eClaim form;
- ◆ Be aware of mandatory and voluntary fields, and have an appreciation of validation routines;
- ◆ Be able to undertake High Level Eligibility Assessments;
- ◆ Be able to produce customer documentation;
- ◆ Be able to submit the completed eClaim to the Capita eStore.

ESTORE - eStore User Training

Duration Half Day

Cost Available upon request

Course Description

This course is designed to for Assessment/ Decision Officers and Training Officers to demonstrate the use and functionality of the eStore (or Holding Area).

The eStore is a dynamic module of the Capita Benefits Application and ensures that data is captured from the **Capita eClaim** or **third party eClaim** applications and placed in a secure location which is subject to Quality Assurance procedures before being accepted by the Capita Benefits application.

Prerequisites

Familiarity with keyboard/ mouse; prior attendance of 'BIMP Introduction to Capita Benefits' or previous experience of Capita Benefits is desirable.

Key Topics

- ◆ eStore Set Up;
- ◆ New Claim Summary;
- ◆ Claim Details;
- ◆ Household & Income Details;
- ◆ Rent Costs;
- ◆ Payment Details;
- ◆ Council Tax Costs;
- ◆ Landlord Details;
- ◆ Notes;
- ◆ Workflow.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all of our courses, comprehensive training documentation will be provided.

Who Should Attend

Authorities may consider the following for attendance:

- ◆ System Administrators;
- ◆ Benefits Assessment Officers/ Decision Makers;
- ◆ Benefits Training & Policy Officers.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Be able to navigate around the eStore;
- ◆ Be able to undertake Quality Checks of information stored within the eStore;
- ◆ Be able to amend information held as necessary;
- ◆ Be able to transfer the data into the Capita Benefits application;
- ◆ Be able to process the new claim *via* Workflow within the Capita Benefits application.

EDBENS - Education Benefits User Training

Duration One Day

Cost Available upon request

Course Description

This course is designed to for Assessment/ Decision Officers and Training Officers to demonstrate the use and functionality of the Education Benefits application.

Prerequisites

Attendance of 'BIMP Introduction to Capita Benefits' or previous experience of Capita Benefits is desirable.

Key Topics

- ◆ Award/Cancel Education Benefit Claims;
- ◆ Household Details;
- ◆ Payment Details;
- ◆ Notification Letters;
- ◆ System Parameters.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all of our courses, comprehensive training documentation will be provided.

Who Should Attend

Authorities may consider the following for attendance:

- ◆ System Administrators;
- ◆ Benefits Assessment Officers/ Decision Makers;
- ◆ Benefits Training & Policy Officers.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Be able to award/cancel Education Benefit claims;
- ◆ Be able to run/interrogate batch program reports;
- ◆ Be able to amend information held as necessary.

QA - Quality Assurance Module Training

Duration One Day

Cost Available upon request

Course Description

This course is designed to for Assessment/ Decision Officers and Training Officers to demonstrate the use and functionality of the Quality Assurance Module.

Prerequisites

Familiarity with keyboard/ mouse; prior attendance of 'BIMP Introduction to Capita Benefits' or previous experience of Capita Benefits is desirable.

Key Topics

- ◆ QA functionality;
- ◆ Correspondence;
- ◆ Claim Details;
- ◆ Household & Income Details;
- ◆ Excel/ Pivot tables;
- ◆ Council Tax Costs;
- ◆ Notes;
- ◆ Rent Costs.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all of our courses, comprehensive training documentation will be provided.

Who Should Attend

Authorities may consider the following for attendance:

- ◆ System Administrators;
- ◆ Benefits Assessment Officers/ Decision Makers;
- ◆ Benefits Training & Policy Officers.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Be able to navigate around the QA frames;
- ◆ Be able to undertake Quality Checks of benefit claims;
- ◆ Be able to amend information held as necessary;
- ◆ Be able to transfer the data into the Capita Benefits application.

CIMP – Introduction to Capita Council Tax

Duration Three Days

Cost Available upon request

Course Description

This course has been designed for all Revenues staff that will use the application to administer Council Tax and can benefit Customer Service/ One Stop Shop staff by providing an overview of the application.

It covers those frames and functions most commonly used in the workaday administration of Council Tax including system parameters and batch processes. The course employs demonstrations and workshops to reinforce the course content.

Prerequisites

Familiarity with keyboard/ mouse; attendance on other courses is not required.

Key Topics

- ◆ System Features/ Functionality;
- ◆ Search Facilities;
- ◆ Account/ Property Creation and Maintenance;
- ◆ Notice Records, Transaction & Profile Details;
- ◆ Discounts/ Exemptions;
- ◆ On-line Postings/ Transfers;
- ◆ Refunds;
- ◆ Band History Maintenance;
- ◆ VO Notifications & Completion;
- ◆ Arrangements;
- ◆ Occupation Adjustments;
- ◆ System Parameters;
- ◆ Logging Correspondence;
- ◆ Description/ Recommended Frequency of Batch Programs.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Staff responsible for the workaday administration of Council Tax.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Have an understanding of the Capita Council Tax application;
- ◆ Be able to navigate around the Desktop and Capita Council Tax application;
- ◆ Understand the principles of account creation and maintenance;
- ◆ Be able to conceptualise notice periods and notice records together with associated transactions;
- ◆ Be able to update discounts and exemptions;
- ◆ Be experienced in posting, transferring and refunding remittances;
- ◆ Have a clear understanding of the system parameters and processes.

CREC - Introduction to Recovery for Council Tax

Duration One Day

Cost Available upon request

Course Description

This course is designed for attendees who will be responsible for the Recovery and Collection of Council Tax. All aspects of the Recovery Cycle will be covered from the issue of a reminder through to Committal.

The course will cover all relevant system functionality including system parameters and recovery batch processes. The course employs demonstrations and workshops to reinforce the course content.

Prerequisites

Familiarity with keyboard/ mouse; prior attendance on 'CIMP Introduction to Capita Council Tax' or prior experience of Capita Council Tax will be assumed.

Key Topics

- ◆ Key system Features/Functionality;
- ◆ Arrangements;
- ◆ Recovery procedures from the issue of reminders through to Post LO actions including Committal;
- ◆ Logging Correspondence;
- ◆ System parameters;
- ◆ Reminders & Final Notices;
- ◆ Running & monitoring batch programs;
- ◆ Holding recovery & adjourning.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Any staff responsible for Recovery and Enforcement within Council Tax.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Have an appreciation and clear understanding of the recovery cycle within Capita Council Tax;
- ◆ Have an insight into system parameters in relation to recovery;
- ◆ Have a clear understanding of the batch processes involved in progressing accounts through various recovery/ enforcement stages;
- ◆ Have experience of administering payment arrangements and be able to select cases for Committal.

CTAD - Introduction to Capita Council Tax Templates

Duration One Day

Cost Available upon request

Course Description

The Capita Council Tax application produces a plethora of system generated correspondence.

This course explores the means of customising or creating documents and paragraphs to enable your Authority to meet its specific needs, and can cater for sites with or without Electronic Data Management Systems, sites requiring dual-language correspondence and sites requiring a means to identify documents for translation/ Braille or large print purposes.

This one-day course provides attendees with the knowledge to update and maintain document templates, where necessary using examples from the Capita Council Tax application. The course employs demonstrations and workshops to reinforce the course content.

Prerequisites

Familiarity with keyboard/ mouse; prior attendance on 'CIMP Introduction to Capita Council Tax' or prior experience of Capita Council Tax would be beneficial.

Key Topics

- ◆ Key application features/ functionality;
- ◆ Command language used in Capita templates;
- ◆ Standard Capita Templates;
- ◆ Customised Templates;
- ◆ Documents & Paragraphs;
- ◆ Fixed Text & Variable Text;
- ◆ Other locally-set parameters.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Any individual(s) responsible for developing &/ or maintaining (or requiring an overview of) Capita Council Tax Templates. Technical staff are welcome to attend, but the course's emphasis is geared toward content rather than technical configuration (e.g. printer settings).

What Attendees Will Learn

How templates work and the creation and maintenance of documents and paragraphs within the Council Tax application.

CTBANK - Council Tax Bankruptcy Module Training

Duration One Day

Cost Available upon request

Course Description

Bankruptcy is fast becoming a more viable alternative than committal.

This course will provide attendees with the knowledge and ability to utilise system functionality of this authorised module.

Prerequisites

Familiarity with keyboard/ mouse; prior experience of Capita Council Tax.

Key Topics

- ◆ Bankruptcy enforcement statuses and the Bankruptcy Details frame;
- ◆ Bankruptcy arrangements.
- ◆ The bankruptcy notifications and review batch program;

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Any individual(s) responsible for recovery and enforcement within Council Tax.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Have an appreciation and clear understanding of the Bankruptcy Module;
- ◆ Have knowledge of the associated system tables and document template;
- ◆ Have a clear understanding of the batch processes involved.

CTOTAL – Council Tax Management Totals

Duration One Day

Cost Available upon request

Description

This course is designed to help users understand, prove and use the information supplied by the extensive range of management totals, on-line frames and batch programs available within the Council Tax application.

Having attended this course, users will be able to fully appreciate the ease with which they can extract statistical information and complete statutory returns using the Capita Council Tax application.

Prerequisites

Prior experience of the Capita Council Tax system and knowledge of key statistics/ Government Returns would be beneficial, although not essential.

Key Topics

- ◆ Account, Property & Transaction Totals;
- ◆ QRC Return;
- ◆ Arrears Analysis;
- ◆ Costs Analysis;
- ◆ Projected Cash Flow Analysis;
- ◆ CTB1;
- ◆ Inland Revenue Return;
- ◆ Selected System Totals;
- ◆ Crown Property Report.

Consultancy Methods

May be delivered as a seminar or course, on-site or at Capita's Trowbridge office.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Anyone responsible for collecting statistical information for either Authority or Government Returns on either a regular or irregular basis.

What You Will Gain

An understanding of how the Capita Council Tax system derives and displays all statistical information necessary for internal and external purposes in addition to the skills to further prove this key management information.

CPARAM - Council Tax Parameter Clean-Up & Data Cleansing Service

Duration One Day

Cost Available upon request

Description

This service is designed to cleanse out-of-date or invalid parameters from the Council Tax Application, in line with the Local Authority's requirements. It will also ensure that the current parameters are correct and investigate if the Local Authority is utilising the full available functionality.

Prerequisites

Access to the back end application.

Key Topics

- ◆ Council Tax Division Maintenance;
- ◆ Parameter frames.

Methods

The Consultant will work with the Local Authority to identify any out-of-date or invalid parameter settings. If any are required to be removed then the Consultant will do this.

Who Should Attend

Authorities may consider the following for attendance:

- ◆ Council Tax Manager;
- ◆ System Administrator (as regards access restrictions/ parameters).

What You Will Gain

- ◆ A fully cleansed database in line with the Local Authority's requirements.

NIMP - Introduction to Capita Business Rates

Duration Three Days

Cost Available upon request

Course Description

This course has been designed for all staff who will use the application to administer Business Rates and can benefit Customer Service/ One Stop Shop staff by providing an overview of the application.

It covers those frames and functions most commonly used in the workaday administration of Business Rates including system parameters and batch processes with the exception of recovery (see 'NREC Introduction to Recovery for Capita Business Rates').

The course employs demonstrations and workshops to reinforce the course content.

Prerequisites

Familiarity with keyboard/ mouse; attendance on other courses is not required.

Key Topics

- ◆ Key application features/ functionality;
- ◆ Searching for accounts and properties;
- ◆ Account/ Property creation and maintenance;
- ◆ Empty Rate/ Exemption / Relief maintenance;
- ◆ Interest calculation;
- ◆ Transfers/ On-line Postings / Refunds;
- ◆ Vacations & Occupations;
- ◆ Rateable Value Maintenance;
- ◆ Splits, Mergers & Reorganisations;
- ◆ Logging Correspondence;
- ◆ Analysis & Totals functionality;
- ◆ Empty/ Void Property Maintenance;
- ◆ Description and recommended frequency of batch programs (the mechanics of which are covered in the CSAD System Administration course).

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Staff responsible for the workaday administration of Business Rates; any staff requiring an overview of Capita Business Rates' batch program suite, statistical returns, analysis and parameters.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Have an understanding of the Capita Business Rates application;
- ◆ Be able to navigate around the Desktop and Capita Business Rates application;
- ◆ Understand the principles of account creation and maintenance, including account movements and VO Schedule amendments;
- ◆ Be able to conceptualise Bill periods and Bill records together with associated transactions;
- ◆ Be able to apply and maintain empty rates, exemptions and reliefs;

- ◆ Be experienced in posting, transferring and refunding remittances and interest calculations;
- ◆ Have a clear understanding of the system parameters and processes;
- ◆ Have a clear understanding of the Business Rates Batch Program suite and recommended frequencies.

NREC - Introduction to Recovery for Capita Business Rates

Duration One Day

Cost Available upon request

Course Description

This course is designed for attendees who will be responsible for the recovery and collection of Business Rates. All aspects of the recovery cycle will be covered from the issue of a first reminder through to committal.

The course will cover all relevant system functionality including system parameters and recovery batch processes. The course employs demonstrations and workshops to reinforce the course content.

Prerequisites

Familiarity with keyboard/ mouse; prior attendance on 'NIMP Introduction to Capita Business Rates' or prior experience of Capita Business Rates will be assumed.

Key Topics

- ◆ Key system Features/Functionality;
- ◆ Arrangements;
- ◆ Recovery procedures from the issue of first reminder through to Committal;
- ◆ Write-Offs;
- ◆ Logging Correspondence;
- ◆ System parameters;
- ◆ Running & monitoring batch programs;
- ◆ Recovery Statistics.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Any staff responsible for Recovery and Enforcement within Business Rates including Court Officers/ Visiting Officers.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Have an appreciation and clear understanding of the recovery cycle within Capita Business Rates;
- ◆ Have an insight into system parameters in relation to recovery;
- ◆ Have a clear understanding of the batch processes involved in progressing accounts through various recovery/ enforcement stages;
- ◆ Have experience of administering payment arrangements and be able to select cases for Committal.

NTAD - Introduction to Capita Business Rates Templates

Duration One Day

Cost Available upon request

Course Description

The Capita Business Rates application produces a plethora of system generated correspondence.

This course explores the means of customising or creating documents and paragraphs to enable your Authority to meet its specific needs, and can cater for sites with or without Electronic Data Management Systems, sites requiring dual-language correspondence and sites requiring a means to identify documents for translation/ Braille or large print purposes.

This one-day course provides attendees with the knowledge to update and maintain document templates, where necessary using examples from the Capita Business Rates application. The course employs demonstrations and workshops to reinforce the course content.

Prerequisites

Familiarity with keyboard/ mouse; prior attendance on 'NIMP Introduction to Capita Business Rates' or prior experience of Capita Business Rates would be beneficial.

Key Topics

- ◆ Key application features/ functionality;
- ◆ Command language used in Business Rates Templates;
- ◆ Standard Capita Templates;
- ◆ Customised Templates;
- ◆ Documents & Paragraphs;
- ◆ Fixed Text & Variable Text;
- ◆ Correspondence Templates.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Any individual(s) responsible for developing and/ or maintaining (or requiring an overview of) Capita Business Rates Templates. Technical staff are welcome to attend, but the course's emphasis is geared toward content rather than technical configuration (e.g. printer settings).

What Attendees Will Learn

How templates work and the creation and maintenance of documents and paragraphs within the Capita Business Rates application.

NINTEG - Business Rates Integrity Clearance

Duration One Day

Cost Available upon request

Course Description

Covers the Business Rates batch program NR6340 and on-line functionality of identifying any integrity issues which may arise, with particular emphasis on the correction of such errors.

This course would suit both new sites and existing sites in dealing with potentially large numbers of errors and provides information on their correction both via the on-line functionality or using the various database tables.

This course, whilst beneficial at any time, would be most beneficial in the period up to debit raising as outstanding errors at this time could result in incorrect charges being raised and may delay the actual debit raising process should a large number of errors be found.

Prerequisites

Familiarity with keyboard/ mouse; prior attendance on the Business Rates Implementation training course and knowledge of QBF &/ or SQL would be beneficial.

All users should have access the QBF/ SQL session via whichever application is normally used, for example – Ewan, PuTTY or Cygwin.

The **NR6340 Integrity Checks** batch program should be run in the Customer's test database prior to the course taking place.

Key Topics

- ◆ Possible causes of Integrity Errors;
- ◆ Identification of errors;
- ◆ Running Integrity check batch program;
- ◆ Correction methodology.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices. Where the course is delivered at Capita's offices, attendees will utilise a training database, giving them the opportunity to progress through worked examples.

However, it is anticipated that Authorities would prefer the course to be delivered on-site, using a test/ training database in order to work through examples specific to your caseload.

As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Anyone responsible for clearing outstanding errors.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Have an understanding of how integrity errors are created;
- ◆ Be able to clear such errors;
- ◆ Understand the relationship between the various database tables and on-line frames.

NVOA - Business Rates VOA Integration Course

Duration One Day

Cost Available upon request

Course Description

Covers the full range of functionality available within the VOA Integration Module for Business Rates.

This course details how using the NR6300 VO Notifications Extract can issue notification of changes to properties to the Valuation Office (VO) *via* an XML schema.

Additionally, the NR6310 batch programs can import the details obtained from the VO in XML format to ensure that data currently held in respect of Rateable Values is correct.

This course will also detail how it is possible to upload amendment schedules from the VO and automatically complete the majority of amendments detailed within these files (i.e. RV amendments, property deletions and address changes) and how any amendments not performed automatically such as Splits, Mergers and Re-Organisations are dealt with.

Prerequisites

Familiarity with keyboard/ mouse; prior experience of Capita Business Rates, particularly with regards to producing VO Notifications and updating Business Rates schedules.

Key Topics

- ◆ Issuing VO Notifications *via* XML;
- ◆ Uploading Full Rating Valuation Lists for reconciliation purposes;
- ◆ Uploading Business Rates schedules for automatic completion of basic amendments.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices. Where the course is delivered at Capita's offices, attendees will utilise a training database, giving them the opportunity to progress through worked examples.

However, it is anticipated that Authorities would prefer the course to be delivered on-site, using a test/ training database in order to work through examples specific to your caseload.

As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Anyone responsible for liaising with Valuation Office after production of VO Notifications and those responsible to updating items within a Business Rates schedule.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Understand how the VOA Integration Module can improve general accuracy when completing Business Rates schedules;

- ◆ Be able to issue and upload files received from the Valuation Office in XML format.

NTOTAL - Business Rates Management Totals

Duration One Day

Cost Available upon request

Description

This course is designed to help users understand, prove and use the information supplied by the extensive range of management totals, on-line frames and batch programs available within the Business Rates application.

Having attended this course, users will be able to fully appreciate the ease with which they can extract statistical information and complete statutory returns using the Capita Business Rates application.

Prerequisites

Previous experience of the Capita Business Rates system and knowledge of key statistics/ Government Returns would be beneficial, although not essential.

Key Topics

- ◆ NDR3 Return;
- ◆ QRC Return;
- ◆ Arrears Analysis;
- ◆ Costs Analysis;
- ◆ Cash Flow Analysis;
- ◆ Financial Statement;
- ◆ Transaction Totals;
- ◆ System Totals;
- ◆ Balance & Recovery Totals;
- ◆ Bailiff Statistics.

Consultancy Methods

May be delivered as a seminar or course on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Anyone responsible for collecting statistical information for either Authority or Government Returns on either a regular or an irregular basis.

What You Will Gain

An understanding of how the Capita Business Rates system derives and displays all statistical information necessary for internal and external purposes in addition to the skills to further prove this key management information.

NBIDS - Business Improvement Districts

Duration One Day

Cost Available upon request

Course Description

This one-day course covers all aspects of the Business Improvement Districts (BIDs) Module and will provide attendees with the ability to create and review BIDs including the creation of BID Accounts and running batch programs to raise the BID Levy.

In addition, attendees will be provided with the knowledge and ability to move BID Accounts through the recovery process, create and review document templates in respect of the BIDs Module and the ability to run and analyse various batch programs including Bill Production, Cash Posting, Recovery & Enforcement and the BID Arrears Analysis batch program.

Prerequisites

Familiarity with keyboard/ mouse; prior experience of Capita Business Rates.

Key Topics

- ◆ The structure of the Business Improvement Districts module;
- ◆ Creating a new BID and raising the Levy;
- ◆ Utilising all BID Batch Programs effectively.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices. Where the course is delivered at Capita's offices, attendees will utilise a training database, giving them the opportunity to progress through worked examples.

However, it is anticipated that Authorities would prefer the course to be delivered on-site, using a test/ training database in order to work through examples specific to your caseload.

As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Anyone responsible for the Billing and Collection of the BID revenue.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Have the ability to create and review BIDs including the creation of BID Accounts and running batch programs to raise the BID Levy;
- ◆ Be able to add and review all aspects of the BID Accounts including Reliefs, Bills, Transactions and Transfers;
- ◆ Have the ability to move BID Accounts through the recovery process – Reminder/ Summons / Liability Order / Post Liability;
- ◆ Be able to create and review document templates in respect of the BIDs Module;
- ◆ Have the ability to run and analyse various batch programs including Bill Production, Cash Posting, Recovery & Enforcement;
- ◆ Be able to analyse the effectiveness of the BID *via* the BID Arrears Analysis program.

CTHB - Generic Revenues & Benefits

Duration Four Days

Cost Available upon request

Course Description

With more and more Authorities moving toward generic practices, and with the Capita Revenues and Benefits applications offering increasingly integrated solutions, we offer a tailored and comprehensive 4-day training package covering workaday functionality across both the Council Tax and Benefits products.

This course is also suitable for Authorities seeking to implement generic working in future, whether you plan to operate entirely generically or in some limited form and is particularly suited to One Stop Shop or other front line staff who respond to queries or undertake some level of update.

It covers those frames and functions most commonly used in the assessment of Housing Benefit and/ or Council Tax Benefit entitlement, together with the frames and functions most commonly used for liability, billing or recovery purposes within the Council Tax application. Additionally, this course may encompass the Capita Payments and Overpayments applications as required.

Prerequisites

Familiarity with keyboard/ mouse; attendance on other courses is not required.

Key Topics

- ◆ Exploring/ Personalising the Desktop;
- ◆ Change of Address/ Tenures;
- ◆ Transitional Protections;
- ◆ First & Last Day of Entitlement;
- ◆ Extended Payments;
- ◆ Adjusting CTB following award/ removal of discount/ exemption;
- ◆ Raising Overpayments/ Excess CTB;
- ◆ Automated Overpayment Subsidy Classification;
- ◆ Ongoing Recovery of Overpayments.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend?

Generic Revenues and Benefits users; One Stop Shop/ frontline officers including Call Centre staff.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Be able to navigate around the Desktop and the Capita Revenues and Benefits applications;
- ◆ Be able to search for an account holder's or claimant's details, utilising various parameters including fuzzy/ wildcard searches;
- ◆ Be able to make notebook/ diary entries;
- ◆ Have an understanding of new Council Tax liabilities and new liabilities and the

First Day of Entitlement for Benefit purposes;

- ◆ Have an understanding of liability terminations and a claimant's last day of entitlement;
- ◆ Have an understanding of changes of address within and outside of the Authority;
- ◆ Be able to navigate commonly used Council Tax and Benefits frames;
- ◆ Have an understanding of some of the main Benefits and Council Tax batch program routines;
- ◆ Be in a position to impart their knowledge to other team members;

CSAD - Introduction to System Administration of Capita Revenues & Benefits

Duration One Day

Cost Available upon request

Course Description

This generic course has been designed for any staff that will administer one or more applications and explains how to configure the Capita system from setting up users and groups, to broadcast messages and the operation of the scheduler.

This course does not rely on specific knowledge of any of the Capita applications but draws on the comprehensive and generic elements of System Administration.

The course employs demonstrations and workshops to reinforce the course content.

Prerequisites

Familiarity with keyboard/ mouse; attendance on other courses (particularly the Introductions to Council Tax, Benefits, Business Rates, Payments & Overpayments as appropriate) is beneficial but not essential.

Key Topics

- ◆ Exploring/ Personalising the Desktop;
- ◆ Setting up Users and Groups;
- ◆ Linking Users to Groups;
- ◆ Programs and Permissions linked to groups/ individual users;
- ◆ The Scheduler – submitting programs/ queues; building queues; parameters/ dependencies etc.;
- ◆ Monitoring Users;
- ◆ Printers;
- ◆ System Security, e.g. password requirements, logon attempts, idle timeouts etc.;
- ◆ Application Security, e.g. denial of access to own accounts, benefit claims, creditor/ debtor identifiers or fraud referrals/ investigations;
- ◆ Overview of Archiving;
- ◆ Capita Mail functionality.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Staff responsible for the administration of the Capita Council Tax, Benefits, Business Rates, Payments and Overpayments applications; any staff responsible for the administration of further modules (such as Quality & Assurance); any staff requiring an overview of the multiple scheduler.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Have an understanding of how to administer the various Capita applications,

- including housekeeping programs;
- ◆ Be able to set up new Users/ Groups;
 - ◆ Have an understanding of generic system security;
 - ◆ Be able to navigate around the Desktop;
 - ◆ Have a clear understanding of the system parameters and processes;
 - ◆ Have a clear understanding of Scheduler operations and be versed in the creation of queues, dependencies, program invocations etc.

PPM - Process and Performance Manager Training

Duration Two Days

Cost Available upon request

Course Description

This course is designed to for Assessment/ Decision Officers and Training Officers to demonstrate the use and functionality of the Process and Performance Manager Application.

The new Process and Performance Manager (PPM) functionality has been developed to enable you to effectively manage and monitor your processes and the performance of your users.

Prerequisites

Familiarity with keyboard/ mouse; prior attendance of BIMP and CIMP 'Introduction to Capita Benefits/ Council Tax' or previous experience of Capita Benefits/ Council Tax is desirable.

Key Topics

- ◆ PPM Parameters;
- ◆ New Claim Summary;
- ◆ Claim Details;
- ◆ Household & Income Details;
- ◆ Rent Costs;
- ◆ Process flows;
- ◆ Read Only Audit Trail;
- ◆ Council Tax Costs;
- ◆ Landlord Details;
- ◆ Notes.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all of our courses, comprehensive training documentation will be provided.

Who Should Attend

Authorities may consider the following for attendance:

- ◆ System Administrators;
- ◆ Benefits Assessment Officers/ Decision Makers;
- ◆ Benefits Training & Policy Officers.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Be able to navigate around the PPM frames;
- ◆ Be able to undertake a complete process action from start to finish;
- ◆ Be able to amend information held as necessary;
- ◆ Be able to transfer the data into the Capita Benefits application;
- ◆ Be able to amend PPM parameters as required.

EBILL - Business Rates and Council Tax eBilling

Duration One Day

Cost Available upon request

Course Description

To assist your Authority in setting up and administering the Capita eBilling Modules and the Council Tax and Business Rates on-line functionality related to eBilling.

Prerequisites

Familiarity with keyboard/ mouse; attendance on other courses is not required although an understanding of Council Tax/ Business Rates templates will be assumed.

Key Topics

- ◆ Council Tax and Business Rates eBilling Modules;
- ◆ PIN creation, revision and revocation;
- ◆ Email attachments and URLs;
- ◆ Batch Program routines;
- ◆ Council Tax and Business Rates Templates;
- ◆ Set Up and System Security.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend?

Any members of staff with responsibility for the administration of Capita's eBilling Module or with responsibility for the creation or administration of eBilling accounts.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Be able to navigate commonly used Council Tax and Business Rates frames used in the administration of eBilling;
- ◆ Be able to request or revoke eBilling Personal Identification Numbers;
- ◆ Be versed in the eBilling Module's interaction with your email programs and the usage of URLs;
- ◆ Have an understanding of the eBilling Module's batch program routines;
- ◆ Be in a position to impart their knowledge to other team members.

VOA - Combined VOA Integration Course

Duration One Day

Cost Available upon request

Course Description

Covers the full range of functionality available within the VOA Integration Module for Council Tax and Business Rates.

Using the CT6100 VO Notification Report and NR6300 VO Notifications Extract is the most effective way in which to issue notification of changes to properties to the Valuation Office. This course details how this procedure can be completed *via* an XML schema.

A main task within both the Council Tax and Business Rates applications is to ensure that data currently held in respect of Bandings and Rateable Values is correct. Therefore the use of the CT6730 and NR6310 batch programs which can import the details obtained from the Valuation Office in XML format can prove to be critical.

Furthermore, within the Business Rates application it is possible to upload amendment schedules received from the Valuation Office and automatically complete the majority of basic amendments detailed within these files (i.e. RV amendments, property deletions and address changes).

Therefore, this course will detail how these actions can be taken and how any amendments not performed automatically are dealt with.

Prerequisites

Familiarity with keyboard/ mouse; prior experience of Capita Business Rates and/ or Council Tax, particularly with regards to producing Valuation Office Notifications and updating Business Rates schedules.

Key Topics

- ◆ Issuing VO Notifications via XML;
- ◆ Uploading Full Rating/ Council Tax Valuation Lists for reconciliation purposes;
- ◆ Uploading Business Rates schedules for automatic completion of basic amendments.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices. Where the course is delivered at Capita's offices, attendees will utilise a training database, giving them the opportunity to progress through worked examples.

However, it is anticipated that Authorities would prefer the course to be delivered on-site, using a test/ training database in order to work through examples specific to your caseload.

As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Anyone responsible for liaising with Valuation Office after production of VO Notifications and those responsible for updating items within a Business Rates schedule.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Understand how the VOA Integration Module can improve general accuracy when completing Business Rates schedules;
- ◆ Be able to issue and upload files received from the Valuation Office in XML format.

BAILIFF - Bailiff Interface

Duration One Day

Cost Available upon request

Course Description

This course demonstrates how to produce three files to be forwarded to the bailiffs, and a fourth interface enables a returned case file (from the bailiffs) to be uploaded and automatically processed by the Capita Council Tax or Business Rates system.

The benefits of this functionality include:

- Reduced levels of manual data input for Local Authorities;
- Efficiency/ time/ cost savings to the bailiff in terms of reducing manual data input and an improved, quicker service from the bailiff to their Local Authority Revenues customers.

Interface 1 - New Case File

This interface will define a standard file format containing new cases of debtors to be referred by the Local Authority to the bailiffs. In defining a standard file format for automatic uploading, a great deal of manual processing will be avoided.

Interface 2 - Amendment File

This interface will define a standard file format containing details of all existing debts that have already been referred to the bailiff and which need to be re-notified to the bailiff because of a change in either the account balance or potentially the forwarding address of the debtor.

Interface 3 – Reconciliation File

This interface can be produced out of the Capita system detailing every case that is still believed to be outstanding for collection with the bailiff. This can then be sent to the bailiffs who will upload the file into their own debt management system and undertake a cross-reconciliation exercise. This will automatically report out any cases whereby the Local Authority believes the bailiffs are pursuing the debt where it is not recorded as a current 'live' case on the bailiff's database, or alternatively where perhaps the bailiffs are still pursuing a case which the Local Authority believes is no longer with them for collection.

Interface 4 - Returned Case File

This interface provides the ability to accept a file in respect of Returned Bailiff Cases, to upload and automatically process these into the Capita Council Tax or Business Rates system.

Prerequisites

Familiarity with keyboard/ mouse; prior experience of Capita Business Rates and / or Council Tax.

Additionally, the Consultant will normally require access to an emulator, e.g. Telnet, Ewan, PuTTY etc.

Key Topics

- ◆ System/ Parameter settings;
- ◆ Preparing cases ready to be referred to the bailiff;
- ◆ Batch programs used to create the files.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices. Where the course is delivered at Capita's offices, attendees will utilise a training database, giving them the opportunity to progress through worked examples.

However, it is anticipated that Authorities would prefer the course to be delivered on-site, using a test/ training database in order to work through examples specific to your Authority.

As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Anyone who will be responsible for producing the files to be issued to the bailiffs for Council Tax and/or Business Rates cases.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Have an understanding of the system parameter settings ;
- ◆ Have the ability to produce the files to be issued to the bailiffs;
- ◆ Be able to upload and automatically process a returns file received from the bailiffs.

LLPG - LLPG Integration

Duration One Day

Cost Available upon request

Course Description

This course covers the full range of functionality available within the LLPG Integration Module for both the Capita Council Tax and Business Rates applications.

The LLPG Module provides a closer level of integration with an Authority's LLPG database incorporating integration with DTF 7.3 (version 2.1) as defined by the NLPG and Intelligent Addressing. Use of the Unique Property Reference Number (UPRN) field in the Council Tax and Business Rates systems enables every property record to be associated with its equivalent in the Authority's LLPG system.

This authorised module includes access to the following additional system functionality:

- SY6260 Gazetteer Upload;
- SY4030 BS7666 Address frame;
- SY4040 LLPG Updates frame.

Using our sample files, this course will demonstrate how to carry out a full UPRN and BS7666 address update and also how to process changes files.

Prerequisites

Familiarity with keyboard/ mouse; prior experience of Capita Business Rates and / or Council Tax.

Additionally, the Consultant will normally require access to an emulator, e.g. Telnet, Ewan, PuTTY etc.

Key Topics

- ◆ System/ Parameter settings;
- ◆ Unique Street Reference Number system table;
- ◆ SY6240 Update UPRN from LLPG batch program;
- ◆ SY6260 Gazetteer Update batch program – including full update run and changes file;
- ◆ SY4040 LLPG Updates frame – including processing address change records and formatting of postal addresses from the BS7666 address.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices. Where the course is delivered at Capita's offices, attendees will utilise a training database, giving them the opportunity to progress through worked examples.

However, it is anticipated that Authorities would prefer the course to be delivered on-site, using a test/ training database in order to work through examples specific to your Authority.

As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Anyone responsible for updating the Council Tax and/ or Business Rates applications in line with the Authority's LLPG database.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Be aware and have an understanding of the system parameter settings;
- ◆ Be familiar with the SY6240 Update UPRN from LLPG and SY6260 Gazetteer Update batch programs and the USRN table;
- ◆ Have an understanding and the ability to use the SY4040 LLPG Updates frame.

BPIMBAL - Benefits, Payments and Overpayments Balancing

Duration One Day

Cost Available upon request

Course Description

The course aims to train the delegate in how to reconcile the Capita **Benefits, Payments** and **Overpayments** applications. The course will give the delegate a thorough knowledge of how the three systems interact and what they would expect to see in one system when certain actions are performed on another. This will be at a case level and batch report level. The knowledge gained should help the delegate in the creation of spreadsheets for ongoing day-to-day reconciliation of the three systems.

Prerequisites

Prior usage/knowledge of the three applications, especially the Benefits application, and/ or attendance of the respective implementation courses. Basic knowledge of and access to Microsoft Excel.

Key Topics

- ◆ Application overviews;
- ◆ Individual user processes and their effects on the other systems;
- ◆ Report level reconciliation;
- ◆ Reconciliation with other systems in the Authority.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices. Where the course is delivered at Capita's offices, attendees will utilise a training database, giving them the opportunity to progress through worked examples.

However, it is anticipated that Authorities would prefer the course to be delivered on-site, where local issues and examples can be discussed.

As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

The course is especially useful for officers responsible for the balancing of the three applications, or those involved in auditing and monitoring the systems. It is also useful for more senior Assessment Officers, or those staff members covering more complicated issues on cases where all three applications are involved.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Have a thorough understanding of how the Benefits, Payments & Debt Management applications interact when key updates are made;
- ◆ Be able to use the Batch Reports to reconcile the three applications and more easily identify where imbalances have occurred;
- ◆ Be able to use the knowledge gained to produce figures for other departments/ systems within the Authority.

INTEG - Integrity Error Clearance

Duration One Day

Cost Available upon request

Description

Whilst the clearance of integrity errors represents a fundamental aspect of your Authority's workaday system administration, Capita appreciates that time and resource constraints can cause delays in remedying such issues; and as certain integrity errors can develop further problems if left unfixed, some errors may endure for a considerable period of time, potentially rendering your integrity check batch programs ineffectual.

As a result, this service designed to assist Authorities in rectifying integrity errors caused by user error across all Capita applications.

This Service is offered on a 'find-and-fix' basis and is not a formal training course*. As such, this Service is not accompanied by course documentation and is instead intended to resolve as many integrity errors as time permits. However, advice will be provided as to the cause of such errors and how to minimise or prevent future occurrences.

Prerequisites

All linked databases should be check-pointed prior to arrival on-site. Please also note that, due to the nature of this Service and/ or the scope and extent of remedial work required, large-scale fixes applied *via* SQL are likely to necessitate the loss of the live system temporarily, although we will endeavour to undertake such work during period(s) of low activity.

Key Topics

Encompasses Integrity Check batch programs relating to the Benefits, Council Tax, Business Rates and Overpayment applications.

Consultancy Methods

The day will be conducted on-site and will be informed by discussions with staff and interrogation of the relevant application(s).

Who Should Attend

Staff responsible for undertaking data cleansing/ integrity clearance, as required.

What You Will Gain

A short report outlining the findings of the day's investigations.

* The Batch Programs HB6800 Subsidy Integrity Check and HB7150 CTB Balancing are already the subject of a formal course, as are any integrity errors encountered within the Overpayments application. As these are formal courses, both are supported by comprehensive documentation. Should your integrity errors concern either of the above, you may therefore wish to consider booking a training course, detailed above, rather than this consultancy service.

AUDD - Conversion to AUDDIS &/ or Paperless DDIs, ADDACS & ARUDD

Duration Five Days

Cost Available upon request

Description

Principal clearing banks (*via* BACS) now make it possible for Direct Debit Originators such as Local Authorities, to hold on to a customer's Direct Debit Instruction (DDI). Therefore, rather than send it to the paying bank to record and store the document, the Originator transmits, electronically, the appropriate details to the customer's bank to indicate that a DDI is now held by the Originator and payments will be requested against that instruction in the near future. This procedure is known as 'AUDDIS' (Automation of Direct Debit Instruction Service).

At present, AUDDIS is optional for Originators and requires authorisation from the Originator's 'Sponsor' bank before the procedure is adopted. However, the banking industry is making great efforts to encourage Originators to operate on this basis and to eventually move to 'paperless DDIs' whereby neither the Originator nor banks hold a DDI and a payer can simply give authority for a new DDI on their bank account by telephone, Internet, or 'face to face'. The details are then passed, from the Originator, to the bank electronically via AUDDIS. Local Authorities, as Direct Debit Originators, rely heavily on the collection of Council Tax by Direct Debit and therefore the Capita Council Tax system caters for this facility, including the 'conversion' of existing DDIs.

Key benefits of AUDDIS include:

- Reduced paper handling;
- Fewer keying errors;

Additionally, late receipt of information about Direct Debit amendments and cancellations can be costly in terms of both time and money. ADDACS (Automated Direct Debit Amendment and Cancellation Service) streamlines the process and ensures that you receive information on amendments and cancellations quickly - dramatically reducing risk of error. It is a faster method of communicating changes, and reduces the number of unpaid Direct Debits and resulting indemnity claims. Changes may include amendments to the customer's account or a request from the customer to cancel a Direct Debit.

ARUDD (Automated Return of Unpaid Direct Debits) is the automated system used by banks to return unpaid Direct Debit payments. The ARUDD report is made available to Originators *via* the BACS payment services website.

In order to maximize the use of these facilities, it is necessary to be able to cope as automatically as possible, from a system point of view, with all 'messages' received in this manner. The CT6240 ADDACS Posting batch process makes it possible for details of unpaid Direct Debits and account changes which Authorities may receive, via the AUDDIS and ARUDD facilities, to be processed.

This consultancy service will assist Authorities through the process of converting to AUDDIS and/ or Paperless Direct Debit (PDD), additionally utilising the ADDACS and ARUDD facilities.

Prerequisites

Prior to the consultancy, you will need to contact your bank to advise that an application is to be made to BACS for conversion to AUDDIS and/ or PDD.

Please note that interfaces will be required in order to produce/ receive files for transmission to / from BACS. These can be provided, for an additional cost, upon request.

Key Topics

- ◆ Changes to system settings;
- ◆ Batch processes;
- ◆ Training provided, to appropriate staff, in the additional system functionality to be used.

Methods

This consultancy service will be delivered on-site, however, reports/ specification requirements may be completed by your Capita Consultant remotely.

System changes will initially be applied to a test/ training database. Once full testing has been successfully completed, assistance will be provided to apply the necessary updates to your live database.

Training will be provided on-site, to appropriate staff members covering the additional system functionality to be used.

What You Will Learn

Upon completion of this consultancy service, you will:

- ◆ Understand how to utilise the Capita system as an AUDDIS Originator;
- ◆ Be able to produce/ receive files for transmission to/ from BACS;
- ◆ Be confident in the use of the system incorporating these changes.

CTBBAL - Benefits – Council Tax Balancing

Duration One Day

Cost Available upon request

Description

Capita Benefits is fully integrated with the Capita Council Tax application. However, auditors will expect that both applications are balanced to one another externally.

This course is designed to provide guidance on how to balance the Benefit Application to the Council Tax Application using a range of on-line batch programs.

Prerequisites

Familiarity with keyboard/ mouse; prior attendance of 'BIMP Introduction to Capita Benefits' or prior experience of Capita Benefits.

Key Topics

- ◆ Balancing Spreadsheets;
- ◆ Batch Report Interrogation.

Methods

The Consultant will utilise the latest Capita Balancing Spreadsheets and a range of Capita Batch Programs.

Who Should Attend

Staff responsible for balancing Benefit Expenditure.

What You Will Gain

- ◆ A understanding of how transactions/posting work;
- ◆ A method to balance figures from Benefits to Council Tax.

SELF - Combined Self Service Consultancy

Duration One Day

Cost Available upon request

Description

This course is designed for the Local Authority to have a full understanding of the use and functionality of Self Service.

Self Service allows the Local Authority's customers to access to information relating to themselves or their tenants.

Prerequisites

Familiarity with keyboard/ mouse; prior experience of Capita Benefits.

Key Topics

- ◆ Issuing PIN numbers;
- ◆ Council Tax Self Service;
- ◆ Configuration;
- ◆ Benefit Self Service;
- ◆ Business Rate Self Service.

Methods

The Consultant will use an on-line database to demonstrate the full functionality.

Who Should Attend

All officers who will be involved in administering and maintaining Self Service.

What You Will Gain

- ◆ A full understanding of Self Service functionality;
- ◆ The ability for the Local Authority to enable stakeholder's access to information.

ARCHIVE - Archiving and Data Removal Service

Duration One Day

Cost Available upon request

Description

Archiving and removing redundant data from your Capita Revenues and Benefits system improves the performance of batch jobs. Archiving and Data Removal will speed up the performance of many batch jobs including Subsidy, SHBE and those that involve transactions such as Arrears Analysis. By removing redundant data, batch jobs have fewer records to analyse, thereby dramatically reducing run times. Our recent Customer Survey revealed that customers who archive their data run their SHBE batch jobs in half the time it takes customers who do not archive their data.

Prerequisites

Familiarity with keyboard/ mouse; prior experience of Capita Benefits.

Key Topics

- ◆ Benefits Division Maintenance;
- ◆ Parameter frames.

Methods

The Consultant will work with the Local Authority to maximise space in order to speed up the performance of the database.

Who Should Attend

Authorities may consider the following for attendance:

- ◆ Management Staff;
- ◆ System Administrator (as regards access restrictions/ parameters).

What You Will Gain

- ◆ The knowledge to effectively manage database space.

SCRAMBLER – Data Scrambler Implementation and Training

Duration Half Day

Cost Available upon request

Description

Demonstrates the usage and functionality of the Data Scrambler.

The Data Scrambler is a standalone application that enables the authority to effectively scramble data in additional databases to comply with the Data Protection Act.

Prerequisites

Familiarity with keyboard/ mouse; ideally prior experience of Capita application suite.

Key Topics

- ◆ Amending and creating XML;
- ◆ Running Java scripts.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all of our courses, comprehensive training documentation will be provided.

Who Should Attend

Authorities may consider the following for attendance:

- ◆ System Administrators;
- ◆ Revenues & Benefits Training & Policy Officers.

IFDEV – Interface Development

Duration Dependent upon Requirements **Cost** Available upon request

Description

Whether importing data into Capita application tables or producing an output file to be imported into a third party system, a bespoke interface can save considerable time and resources.

Capita regularly develop and deliver a number of interface requirements to existing customers, primarily those to and from Housing systems in respect of Council or LSVT tenants, rent increase files from Housing Associations and those to and from general ledger or corporate payment systems. However, any business process may be appropriate for interface development.

Recent examples include –

Generic Housing Association Rent Increases

Particularly in the run-up towards End of Year, authorities may receive innumerable different files of rent increases from several different sources and in several different formats. These may be entirely paper-based or within spreadsheets but nonetheless require a considerable degree of manually updating the Capita Benefits application.

Capita have provided several customers with bespoke yet generic solutions for automatically updating rental liabilities from a multitude of sources be that at EOY only, throughout the year or a mixture of the two depending upon what the individual HAs can provide.

Used in conjunction with chargeable modules such as Assessment Details/ Payments Files this provides a high level of seamless automation between the authority and RSLs.

Low Income Households/ Poverty Mapping

Capita have developed a number of bespoke interfaces for customers to provide details of low income households. Utilising information from both the Benefits and Council Tax applications, this information has been put to use in poverty mapping *via* ward/ post code, potential usage of planned public or leisure facilities such as playgrounds, and household composition.

Methods

An initial meeting of stakeholders will normally be required in order to ascertain each party's specific requirements. Thereafter, a Draft Specification document will be produced for consideration before development commences and the interface(s) are delivered for testing.

PAYIMP - Introduction to Capita Payments

Duration One Day

Cost Available upon request

Course Description

This course has been designed for any staff that will use the application to issue, reissue or reconcile payments in respect of Housing Benefit payments and Council Tax/ Business Rates and Capita Overpayment Refunds, and can benefit Customer Service/ One Stop Shop staff by providing an overview of the application.

It covers those frames and functions most commonly used in the workaday administration of the Capita Payments application including system parameters and batch processes.

The course employs demonstrations and workshops to reinforce the course content.

Prerequisites

Familiarity with keyboard/ mouse; attendance on other courses is not required.

Key Topics

- ◆ Exploring/ Personalising the Desktop;
- ◆ Searching for Creditors, Cheques/ BACS payments;
- ◆ Creditor Creation & Maintenance;
- ◆ Creditor/ Payment Enquiries;
- ◆ Templates and Parameters;
- ◆ Payment Production;
- ◆ Bank Reconciliation;
- ◆ Manual Payments/ Written Back Payments;
- ◆ Description and recommended frequency of batch programs (the mechanics of which are covered in the 'CSAD System Administration' course);
- ◆ System Interaction.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices. Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Staff responsible for the workaday administration of the Capita Payments application, such as Control Officers, Senior Benefits/ Council Tax/ Business Rates Staff/ Trainers; any staff requiring an overview of the Capita Payments Batch Program suite.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Have an understanding of the Capita Payments application;
- ◆ Be able to navigate around the Desktop and Capita Payments application;
- ◆ Have a clear understanding of the system parameters and processes;
- ◆ Have a clear understanding of the Payments Batch Program suite and recommended frequencies;
- ◆ Have a clear understanding of the cyclical payment production process;
- ◆ Have a clear understanding of bank reconciliation, reissuing payments (including to different creditors), writing payments back against overpayments, manual and forward cheques and any HB subsidy implications.

OPAYIMP - Introduction to Capita Overpayments

Duration One Day

Cost Available upon request

Course Description

This course has been designed for any staff who will administer Housing Benefit Overpayments, is also recommended for Assessment/ Decision Officers (specifically senior/ training officers) and can benefit Customer Service/ One Stop Shop staff by providing an overview of the application.

It covers those frames and functions most commonly used in the workaday administration of the Capita Overpayments application including system parameters and batch processes.

The course employs demonstrations and workshops to reinforce the course content.

Prerequisites

Familiarity with keyboard/ mouse; attendance on other courses is not required.

Key Topics

- ◆ Exploring/ Personalising the Desktop;
- ◆ Searching for Debtors, Cheques/ Cash etc., payments, transactions due to ongoing HB recovery, underlying entitlement or Blameless Tenant Recovery;
- ◆ Debtor Creation and Maintenance;
- ◆ Debtor/ Posting Enquiries;
- ◆ Templates;
- ◆ Parameters;
- ◆ Invoices and Requisitions;
- ◆ Invoice/ Reminder Production;
- ◆ Transferring Credits and Debts;
- ◆ Agreements & Vouchers;
- ◆ Recovery, Write-Offs and Non-Recoverable Overpayments;
- ◆ Direct Debits;
- ◆ Issuing Refunds;
- ◆ Manual Postings;
- ◆ Description and recommended frequency of batch programs (the mechanics of which are covered in the 'CSAD System Administration' course);
- ◆ System Interaction.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Staff responsible for the workaday administration of the Capita Overpayments application, such as Control Officers, Senior Benefits/ Training Officers; any staff requiring an overview of the Capita Overpayments Batch Program suite.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Have an understanding of the Capita Overpayments application;
- ◆ Be able to navigate around the Desktop and Capita Overpayments application;
- ◆ Have a clear understanding of the system parameters and processes;
- ◆ Have a clear understanding of the Overpayments Batch Program suite and recommended frequencies;
- ◆ Have a clear understanding of both automated and manual recovery cycles;
- ◆ Be able to transfer credits and debits, including issuing refunds via the Capita Payments application;
- ◆ Have an understanding of HB subsidy implications as regards non-recoverable overpayments etc.

OPINTEG - Introduction to Overpayment Integrity Errors

Duration One Day

Cost Available upon request

Description

The course aims to instruct delegates in understanding and resolving integrity errors occurring within Overpayments application. These errors are reported within the batch program IM6350 Integrity Checks.

Where the course is delivered on-site, time will be allocated to addressing the Authority's own IM6350 Integrity Checks report within a test/ training database, with a view to clearing errors which can then be replicated in the live database.

Prerequisites

A prior knowledge of SQL and QBF is assumed as these tools will be used by delegates in resolving integrity errors. This means that delegates will need access to an emulator, e.g. Telnet, Ewan, PuTTY etc.,

Ideally, Authorities should run the IM6350 Integrity Check batch program (against the database in question) immediately prior to the trainer's arrival.

Where there are insufficient examples of each error within the report, the trainer may require time at the beginning of the day to create integrity errors within the site's test database (or another suitable database) which can be used as examples during the course.

Key Topics

- ◆ Running the integrity report *via* the batch scheduler and *via* the on-line frames;
- ◆ Explaining the link between the on-line frames and the database tables;
- ◆ Understanding how the core tables relate to one another;
- ◆ Internal Overpayments balancing;
- ◆ Understanding how to resolve integrity error.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge office.

When the course is delivered at Capita's offices, attendees will utilise a training database, giving them the opportunity to progress through worked examples.

However, it is anticipated that Authorities would prefer the course to be delivered on-site, in order to work through examples specific to your caseload. Where training is delivered on-site, please refer to the prerequisites listed above.

As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

The course is for individuals involved with running, checking and clearing the im6350 Integrity Checks report.

As described above most of the errors require amendments to be made to the database tables *via* QBF and ISQL, therefore delegates will benefit from a prior knowledge of these.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Understand the root cause of integrity errors;
- ◆ Understand which database tables are affected by the error;
- ◆ Know how to prove the balances and transactions by interrogating other systems;
- ◆ Be able to perform fixes *via* QBF/SQL or to instruct an IT colleague competent in these skills which tables to update.

NEWREL - New Release Consultancy/ Training

Duration One Day

Cost Available upon request

Description

With the increasing size, scope and complexity of each software release the purpose of this course is to impart an understanding of new/ revised functionality, new features, enhancements and development items contained within the current release of Capita Council Tax/ Benefits/ Business Rates/ Overpayments/ Payments as appropriate.

Prerequisites

Prior experience of the relevant Capita application and a desire to get the most out of the developments within the Capita product and maximise the Authority's efficiency.

Key Topics

- ◆ New features/ enhancements;
- ◆ New modules, such as Development Fund as appropriate;
- ◆ Impact upon business processing;
- ◆ System interaction;
- ◆ New templates/ batch programs, as appropriate.

Consultancy Methods

This course may be delivered on-site or at Capita's Trowbridge office.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Any staff involved with new release testing, users or anyone delivering training on new Capita releases.

What You Will Gain

A detailed knowledge of current Capita product developments and new or enhanced areas of functionality; the peace of mind that the system is being used efficiently, that legislative requirements are being adhered to and how business processes may be improved to incorporate any changes.

SUT - Super User Training

Duration Two Days

Cost Available upon request

Description

This course is available for the following Capita applications and runs to two days per product; Benefits, Council Tax and Business Rates. Authorities with specific requirements relating to the Payments or Overpayments applications should refer to the separate 'SQLCDS - Bespoke SQL/iSQL/CDS Development service' or the 'SQL – SQL Fundamentals' course.

The course is intended to enable those involved with the administration of the Capita applications to understand how the information in their database is combined to display the on-line information.

It will also give them the skills to access, retrieve and update information contained within the database using SQL, iSQL or QBF query tools. The course employs demonstrations and workshops to reinforce the course content.

Prerequisites

A basic understanding of the Capita product to which the course relates. Any experience of the Capita database or the concepts of relational databases is useful but not essential.

Key Topics

- ◆ The use of Structured Query Language and Interactive Structured Query Language as both a query and update tool;
- ◆ The use of Query-by-Forms as both a query and update tool;
- ◆ The interrelationship between key fields and tables within the database(s);
- ◆ The ability to create and manipulate look-up tables, e.g. from existing tables or .csv files.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices. Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Users and IT staff who are either completely new to these areas or who wish to improve upon basic knowledge. Additionally, those already competent in relational database query tools will benefit from a course applied specifically to the Capita applications.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Have an understanding of how data is held and retrieved within the Capita table structure and how to manipulate data as required;
- ◆ Have an understanding of command language used within SQL, iSQL and QBF;
- ◆ Have an understanding of predicates, correlation names, Cartesian Product, mathematical functions, data types etc.

MGMT – Application Management Overview

Duration One Day

Cost Available upon request

Description

This course is available for *each* of the Capita applications and is recommended for senior staff responsible for the overall management of the relevant service, including those who perhaps have not attended any other courses.

The course can also benefit new senior starters who are unfamiliar with the relevant Capita application(s).

The purpose of the course is to introduce such staff to overall system functionality, with a particular emphasis on each application's suite of batch programs and how these can be utilised to monitor or report on performance.

Prerequisites

For existing staff, a good knowledge of the relevant application and a desire to understand the higher-level processes inherent within the application; for new senior starters or existing staff who only require an overview of the application, a good knowledge of any legislation etc., relating to the relevant application, which may include statistical returns or CPA/ PM standards and how the application can assist in meeting and exceeding these.

Key Topics

- ◆ Demonstration and discussion of key Benefits/ Council Tax/ Business Rates/ Payments and Overpayments Management Information batch program routines;
- ◆ Frequency of above batch programs;
- ◆ Output of above batch programs;
- ◆ Management Information parameters/ on-line frames, as required;
- ◆ Areas of application currently not being used/ being under-utilised.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided, but any such documentation will relate to the specific application(s) covered or any course documentation suitable to the Authority's prerequisites, above.

Who Should Attend

Senior staff wishing to gain an overview of the management information available from the relevant Capita application. See also Prerequisites, above.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Have an understanding of the management information batch program groups relating to the application;
- ◆ Have an appreciation of the application's validation routines which serve to minimise errors made by their users, as appropriate;
- ◆ Have an appreciation of which manual processes the Authority currently

undertakes which may be automated/ semi-automated within the application.

SQL - SQL Fundamentals

Duration One Day

Cost Available upon request

Description

This course is designed to introduce the Database structure and content of the Capita applications, together with the skills required when manipulating and interrogating data held within a relational database, specifically in the use of SQL and iSQL.

This differs from 'SUT – Super User Training', inasmuch as this course focuses primarily on SQL/iSQL syntax and can therefore be applied across all Capita applications.

It will also give attendees the skills to access, retrieve and update information contained within the database using SQL/ iSQL query tools. The course employs demonstrations and workshops to reinforce the course content.

Prerequisites

A basic understanding of one or more of the Capita applications. Any experience of Capita databases or the concepts of relational databases is useful but not essential.

Key Topics

- ◆ The use of Structured Query Language and Interactive Structured Query Language as both a query and update tool;
- ◆ Arithmetic, string, punctuation and aggregate functions;
- ◆ Database fundamentals and the concept of a relational database;
- ◆ SQL Commands including Commit, Help, Insert, Create, Modify, Delete, Rollback, Distinct, Drop, Select, Set, Update.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices. Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Technical and managerial IT personnel who require an appreciation of the features and capabilities of the UNIX Operating System. This course will supplement any training on CDS.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Have an understanding of how data is held and retrieved and how to manipulate data as required;
- ◆ Have an understanding of command language used within SQL and iSQL;
- ◆ Have an understanding of predicates, correlation names, Cartesian Product, mathematical functions, data types etc.

SQLUNIX - Developing SQL/ UNIX

Duration Two Days

Cost Available upon request

Description

The first day of this course follows the structure of 'SQL – SQL Fundamentals' (see above); the second day builds upon SQL developed on day one to provide an overview of UNIX.

Prerequisites

A basic understanding of one or more of the Capita applications. Any experience of Capita databases or the concepts of relational databases is useful but not essential.

Key Topics

- ◆ See Key Topics against SQL (above).
 Additionally:
- ◆ Introduction to UNIX;
- ◆ Brief History of UNIX;
- ◆ UNIX Architecture;
- ◆ Text Editing Using Vi;
- ◆ Working with Directories;
- ◆ Working with Files;
- ◆ Printing.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge office.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Technical and managerial IT personnel who require an appreciation of the features and capabilities of the UNIX Operating System.

What Attendees Will Learn

As for 'RC09SQL – SQL Fundamentals' on the first day; additionally, this course covers all essential command line facilities including file handling, data manipulation, security, search and replacing, editing, printing and management.

SQLCDS - Bespoke SQL/ iSQL/ CDS Development

Duration Dependent upon requirements **Cost** Available upon request

Description

Whilst each Capita application incorporates a suite of batch programs designed to manage, report on or administer the relevant application such as producing Benefit payments, processing refunds, enabling balancing and reconciliation or automating Council Tax or Overpayment recovery, it is anticipated that Authorities may require bespoke developments in order to meet a particular need.

Such bespoke developments may be necessitated to identify particular circumstance(s) across the application(s) as required, where an existing batch program routine does not meet your specific needs, or to report on or minimise common user errors.

Additionally, as Authorities may require such bespoke developments to be run on an entirely ad hoc basis, on a regularly scheduled basis, or a mixture of both, any bespoke developments will, wherever possible, incorporate automatically adjusted date parameters and require minimal user intervention.

Bespoke developments may be delivered as CDS reports, an SQL invoked from the SY6040 Shell Script Command or as a DLL for Windows sites, as required.

The duration and cost of bespoke developments are entirely dependent upon your requirements but are informed by any prerequisites, below.

Prerequisites

Some developments may require nothing more than an email contact for the Consultant to forward the completed report to; where the development is more complex and/ or requires the Consultant to transfer the development to your Authority's server(s), and then remote access will be required.

This will also normally necessitate any developments being run in a test environment initially with the results investigated by the Authority to ascertain whether results are as anticipated and, where not, to undertake refinements before re-running.

Where a development is designed to update fields/ tables within an application, on-site consultancy will normally be required and will again necessitate prior testing.

Finally, highly complex developments will generally require development day(s) prior to delivery.

Recent Examples

- ◆ The ability to better target Interventions based upon local risk, for example:
 - Identifying ahead of time self-employed claimants whose income hasn't been reviewed over the preceding 52 weeks;
 - The ability to discount or exclude perceived low-risk cases from automated interventions;
- ◆ The ability to target Benefit take-up campaigns;
- ◆ The ability to identify empty properties with no forwarding address(es);
- ◆ The ability to produce summonses totals and the total balance at each enforcement stage, and also produce case listings;
- ◆ Council Tax Moves processed during the preceding month;

- Identifying ahead of time JSA(C) recipients where that income has been in use for six months or more and with no requirement on users to set future diary date(s);
- ◆ The ability to update Work Areas, such as where these are determined by address splits automatically (i.e. with no requirement on users to set/unset Work Areas themselves);
- ◆ The ability to set/ unset Unsafe Address flags dependent upon postcode, which can then inform Visiting Officers' schedules and with no requirement on users to set/unset flags accordingly;
- ◆ The ability to correct Postcodes to enable Walk Sort;
- ◆ Subsidy corrections;
- ◆ Benefits poverty mapping by parish/ ward etc.,
- ◆ The ability to identify live accounts by payment method code;
- ◆ The ability to identify accounts with current single discounts where other liable names are present;
- ◆ The ability to identify accounts with costs by financial year and the value of costs raised for each notice. The sum of all payments made since the costs were raised are then calculated and the results exported into a .csv file enabling users to enter formulae in Excel to calculate how much of the costs have been paid and how much is still outstanding;
- ◆ The ability to list all Housing Benefit overpayments by recovery stage where there is a balance outstanding in addition to listing where no payment has been received in the last three, six or 12 months.

Consultancy Methods

All bespoke developments will be accompanied by documentation detailing the work undertaken together with usage instructions where required and any caveats (such as when the development may or may not be run, particularly where other programs/ batch programs are dependent upon its completion etc.).

Who Should Attend

Where on-site consultancy is required, the Consultant should be accompanied by the individual/s that will have responsibility for managing, running or dealing with any output created by the bespoke development(s).

What You Will Gain

Individual or a series of bespoke SQL/CDS developments specifically geared to meet your Authority's needs and which, where possible, can be run at any time and with minimal intervention.

Caveat

Future product changes may require amendments to be made to any bespoke development. Furthermore, their usage may over time become redundant following product or legislative changes. Authorities are therefore advised to refer to each application's Product Development Plan and Product Roadmaps which detail known or anticipated changes.

SILVER - Health Check Silver Service

Duration One Day

Cost Available upon request

Description

The first level of Health Check provides a one day overview of how effectively the Capita system is being used for a particular application, with particular emphasis upon parameters and usage of system indicators.

For instance, should your database feature redundant, inconsistent or nonsensical parameters, forcing users to trawl through parameter values to find the right one, Capita can assist your Authority in tidying up your parameters, data cleansing affected claims or accounts and putting the necessary procedures in place to ensure your data retains a high degree of integrity or your parameters remain future-proof and user-friendly.

Furthermore, we can provide you with bespoke SQL/CDS developments to identify parameter usage on an ongoing basis, perhaps to inform training needs or to ensure that – once optimally set – your parameters remain that way.

Similarly, we can also provide your Authority with facilities to ensure that parameters or system indicators are set or unset automatically with little or no user intervention and which can be run as part of your housekeeping programs.

Available for any of the Capita products, the day encompasses review of the usage of the application between 10 a.m. and 3.30 p.m. An hour is provided at the end of the day for the Consultant to produce a short report detailing their findings.

Prerequisites

Should the Authority have any specific areas of concern that they would like to be investigated, these should be passed to their Account Manager with a minimum of 7 days' notice prior to the day of the visit.

Should the Authority have no specific areas of concern, the Consultant will work on their own initiative, with a particular focus on unexpected or non-standard usage of the application.

Additionally, where the Health Check is designed to assist your Authority in updating parameters as detailed above, then all linked databases should be check-pointed prior to arrival on-site.

Key Topics

- ◆ On-line common functionality as appropriate;
- ◆ System Indicators or Application Parameters, including usage or redundancy;
- ◆ The application's batch programs, e.g. frequency;
- ◆ Investigation of batch program output;
- ◆ Templates;
- ◆ Balancing;
- ◆ Permissions/ Access;
- ◆ Investigation of the database via Ingres query/ reporting tools;
- ◆ System security.

Consultancy Methods

The day will be conducted on-site and will be informed by discussions with staff, staff observation and interrogation of the relevant application.

Who Should Attend

The Consultant should be free to observe workaday usage of the application but Control Section staff and/ or Managers/ Team Leaders should also be available throughout the day for any questions and to receive the report.

What You Will Gain

A short report outlining the findings of the day's investigations. This will highlight any major areas of concern where system functionality is not being used as anticipated or there are data issues that require correction.

GOLD - Health Check Gold Service

Duration Two Days

Cost Available upon request

Description

The second level of Health Check provides a more detailed investigation of how effectively the Capita system is being used for a particular application.

One and a half days are spent on-site investigating processing with the remainder of the second day either spent on-site or remotely, at the discretion of the Consultant in order to document their findings.

The Consultant will then forward their report to your Account Manager for review before it is forwarded to you.

Prerequisites

Should the Authority have any specific areas of concern that they would like investigating these should be passed to their Account Manager with a minimum of seven days' notice prior to the first day of the visit.

Should the Authority have no specific areas of concern, the Consultant will work on their own initiative, with a particular focus on unexpected or non-standard usage of the application.

Key Topics

- ◆ On-line common functionality, e.g. deciding benefit claims, creating/ moving Council Tax accounts, creating overpayments, issuing refunds, creating Fraud referrals etc., as appropriate;
- ◆ The application's batch programs, e.g. frequency;
- ◆ Scheduler operations/ output;
- ◆ Programs/ Permissions;
- ◆ Templates;
- ◆ Balancing/ Reconciliation;
- ◆ System Security/ Access;
- ◆ Investigation of the database *via* Ingres query/ reporting tools.

Consultancy Methods

Time spent on-site will be informed by discussions with staff, staff observation and interrogation of the relevant application.

Who Should Attend

The Consultant should be free to observe workaday usage of the application but Control Section staff and/ or Managers/ Team Leaders should also be available throughout the day(s) for any questions.

What You Will Gain

A full report detailing all of the Consultant's findings, conclusions and recommendations.

This will highlight any major areas of concern where system functionality is not being used as anticipated or system data that requires correcting.

PLATINUM - Health Check Platinum Service

Duration Four Days

Cost Available upon request

Description

The third level of Health Check provides the most detailed investigation of how effectively the Capita system is being used for a particular application.

Two days are spent on-site looking at all aspects of processing from general processing to all batch programs and documents produced. The third day is spent remotely documenting findings.

The fourth day follows two –three months after the initial report in order to visit the Customer and produce a short report on the progress of implementing the original findings. The Consultant will forward both reports to your Account Manager for review before they are forwarded to you.

Prerequisites

Should the Authority have any specific areas of concern that they would like investigating these should be passed to their Account Manager with a minimum of seven days' notice prior to the first day of the visit.

Should the Authority have no specific areas of concern, the Consultant will work on their own initiative, with a particular focus on unexpected or non-standard usage of the application.

Key Topics

- ◆ All on-line functionality, e.g. deciding benefit claims, creating/ moving Council Tax accounts, creating overpayments, issuing refunds, creating Fraud referrals etc., as appropriate;
- ◆ The application's batch programs, e.g. frequency;
- ◆ Scheduler operations/ output;
- ◆ Programs/ Permissions;
- ◆ Templates and documents produced;
- ◆ Balancing/ Reconciliation;
- ◆ System Security/ Access;
- ◆ Investigation of the database *via* Ingres query/ reporting tools;
- ◆ Report detailing findings and recommendations.

Consultancy Methods

Three days will be conducted on-site and will be informed by discussions with staff, staff observation and interrogation of the relevant application.

Who Should Attend

The Consultant should be free to observe workaday usage of the application but Control Section staff and / or Managers/ Team Leaders should also be available throughout the days on-site for any questions.

What You Will Gain:

A two-day investigation provides sufficient time to cover all aspects of processing and system administration in detail following discussions with members of any relevant teams.

You will receive a full report detailing all of the Consultant's findings, conclusions and recommendations.

This will highlight any major areas of concern where system functionality is not being used as anticipated or system data that requires correcting.

CDS - Capita Decision Support User Training

Duration Two Days

Cost Available upon request

Description

The purpose of this course is to demonstrate the OpenText reporting tool. Additionally, numerous standard Capita Decision Support (CDS) reports will be demonstrated. The course employs demonstrations and workshops to reinforce course content.

Prerequisites

Prior on-site Installation of the OpenText & CDS Modules. Familiarity with a computer keyboard and mouse. Attendance on previous courses is not required.

Key Topics

- ◆ Creating basic and advanced queries;
- ◆ Manipulating Query results;
- ◆ Producing reports from Query results;
- ◆ Defining Calculations and exceptions;
- ◆ Distributing reports;
- ◆ Converting Standard reports;
- ◆ Using & Creating Executive Buttons;
- ◆ Creating Interactive Reports using Hotspots;
- ◆ Creating Multi-presentational reports using charts and templates.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge office.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Anyone wishing to produce and maintain ad hoc reports from the Capita applications.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Be versed in creating and manipulating queries using the tools provided as part of the OpenText product;
- ◆ Understand the process behind defining reports, distributing reports, executive buttons, hotspots and multi-presentational reports.

CDSADM - Capita Decision Support Set Up & Administration Training

Duration One Day

Cost Available upon request

Description

This one-day course must be preceded by a one day installation day. The purpose of this day is to understand how to create new data models and the user front end within the Capita Decision Support product.

The course employs demonstrations and workshops to reinforce course content.

Prerequisites

Prior on-site installation of the OpenText & Capita Decision Support (CDS) Modules. Familiarity with a computer keyboard and mouse. Basic knowledge of database structures is required.

Key Topics

- ◆ Creating & Maintaining Data Models;
- ◆ Improving & Developing a Data Model;
- ◆ Issues of deployment and change management;
- ◆ Permissions & Security Settings;
- ◆ Understanding Design Mode methods.

Training Methods

This course may be delivered on-site or at Capita's Trowbridge offices.

Attendees will utilise a training database, giving them the opportunity to progress through worked examples. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

Anyone required to understand, maintain and/ or create data models using the Capita Decision Support tool.

What Attendees Will Learn

Upon completion of the course attendees will:

- ◆ Be able to create and maintain CDS data models and permission levels;
- ◆ Gain an understanding of data maps;
- ◆ Possess a basic design schematic for Capita Council Tax/ Benefits/ Business Rates/ Payments/ Overpayments.

MOBILE - Capita Mobile Training

Duration Modular; half day per Module **Cost** Available upon request

Description

The Capita Mobile product allows Authorities to move away from paper-based and re-keying procedures currently utilised by Visiting Officers and is normally delivered in modular format for:

- Council Tax/ Business Rates Visiting Officers;
- Welfare Benefits Visiting Officers;
- Designated Fraud Officers.

Guidance and training on how the module(s) will replace paper-based procedures will also be provided.

Prerequisites

Procurement and installation of tablet PCs; authorisation of relevant modules within the Capita database; familiarity with keyboard and mouse (course includes overview of using Tablet PCs). Attendance on previous courses is not required.

Key Topics

- ◆ Navigating around the Tablet PC;
- ◆ Understanding the Interface between Capita Revenues and Benefits and the Capita Mobile product;
- ◆ Reading & understanding the information held within the Tablet;
- ◆ Completing an outstanding Visit/ Inspection;
- ◆ Attaching files/ photographs;
- ◆ Transmitting data from the Tablet to Capita Revenues and Benefits and *vice versa*;
- ◆ Printing relevant correspondence where appropriate;
- ◆ Using Capita Mobile reports;
- ◆ Discussion of changes in working practices and procedures where appropriate;
- ◆ Visiting Officer Scheduling Mechanics where appropriate;
- ◆ Completing a Building Works inspection and functionality (where the Building Works module has been purchased);
- ◆ Inserting Change in Occupation details (if applicable).

Training Methods

This course can only be delivered on-site. Attendees will utilise a test database (or any recent copy of your live database as required), giving them the opportunity to progress through worked examples.

This will also enable the Authority to utilise the test database as a pilot for live implementation. As with all our courses, comprehensive training documentation will be provided.

Who Should Attend

As a modular course, consideration should be given to who should attend, as detailed under Description, above.

What Attendees Will Learn

The course has been designed to assist the Authority in moving from a paper-based system to an electronic one *via* Tablet PCs. Attendees will be able to use the Tablet and apply changes to the Capita application *via* the interface, with a full understanding of how to transmit data received following a visit or Inspection.

BPR - Business Process Re-engineering

Duration Dependent upon Modules **Cost** Available upon request
to be analysed

Description

To analyse the Authority's existing business processes and make recommendations to develop existing working practices/ procedures, implement new working practices/ procedures to better fit with the Capita package.

This can be tailored toward specific modules within the Capita applications, such as ETD or Fraud in Benefits or Recovery in Council Tax and Business Rates.

The number of days required for this process will be dependent upon the number of modules to be reviewed. Your Account Manager can confirm this at the time of booking.

Prerequisites

The Authority should outline the specific areas of concern which require investigation to their Account Manager a minimum of seven days prior to arrival on-site.

Consultancy Methods

- **Prerequisite Day(s)** The Consultant will provide an agenda based upon the Authority's requirements and will gain an understanding of the Authority's current processes in consultation with Control Team staff, Managers and end users of the relevant application(s);
- **Report Day(s)** The Consultant will document their recommendations for improvement. This will be done remotely. A **draft report** will be supplied *via* your Account Manager;
- **Workshop Day(s)** The Consultant's findings and recommendations will be discussed based on the draft report. Following the workshop a **final report** will be prepared;
- **Training Day(s)** Should additional training be required as a result, this can also be provided;
- **Follow-up Day** 2 – 3 months later, the Consultant will visit to review the Customer's progress.

Who Should Attend

Individuals responsible for Business Processes and end users of relevant applications/ modules.

What You Will Gain

A more efficient and effective way to utilise the Capita applications, maximising the Business with the software solutions available. A comprehensive report of findings and recommendations will be supplied.

Capita Consultancy Visit Pro-forma

This Form should be completed by the Customer and returned to your Account Manager/ Project Manager a minimum of one week prior to the Consultant's visit. Please photocopy as required.

Authority's Name	
Contact Name(s) on Day of Visit	
Contact Telephone	
Date of Visit	
Capita Product	
Domestic Arrangements <i>(Office Location; Travel Details/ Map; Car Parking Arrangements etc.)</i>	
Customer Requirements <i>(Please state in order of priority)</i>	Consultant's Estimation of Time <i>(To be completed on day)</i>
1) 2) 3) 4) 5)	
Additional Requirements/ Comments	

Capita Consultancy/ Course Booking Form

This Form should be completed by the Customer and returned to your Account Manager/ Project Manager. Please photocopy as required.

Authority's Name

Authority's Address

Contact/ Customer's Name

Contact/ Customer's Title

Contact Telephone

Purchase Order No *(Where Applicable)*

For Courses held at Capita's Offices, please indicate if lunch is to be provided Yes / No
(Courses including lunch will be charged above standard rates; special dietary requirements should also be notified to Capita)

Course Code	Course Title	Cost	Start Date	End Date	Location	Delegate Name(s)

I have read the requirements outlined at the beginning of this document and can confirm that delegates meet the prerequisites as detailed within the Course Descriptions.

Authorised Signatory

Signed

To book any Training/ Consultancy Services:

- Telephone your Account Manager, then complete the above form and return it within seven days of booking; or
- Telephone your Project Manager, then complete the above form and return it within seven days of booking; or
- Fax your completed form(s) to 08701 631824, marked for the attention of your Account or Project Manager; or
- Post your completed form(s) to:

Capita Business Services Ltd
Manvers House
Manvers Street,
Trowbridge
Wiltshire
BA14 8YX

marked for the attention of your Account or Project Manager.

CAPITA Evaluation Form

Your name

Your email

Organisation

Consultant

Date

Course

Venue

What did you think of the trainer's ability to respond to questions?

What did you think of the trainer's sensitivity to your needs?

How well did the course meet its stated objectives?

Please describe which part of the course you found most useful and why?

What did you think of the course's materials/ documentation?

Was this course presented at a satisfactory pace?

What did you think of the course's presentation and training methods?

What suggestions can you make to improve this course?

What did you think of the trainer's knowledge of the subject area?

May we use your name and/ or comments in promotional material?

Please return to Michelle.Tyler@capita.co.uk quoting '#Evaluation Forms' (as written) in the subject field. Thank you.



Consultancy Evaluation Form

Your name

Your email

Organisation

Consultant

Date

Course

Venue

What did you think of the Consultant's ability to respond to questions?

What did you think of the Consultant's sensitivity to your needs?

How well did the Consultant meet the stated objectives?

Please describe which part of Consultancy you found most useful and why?

What did you think of the documentation?

Was this day presented at a satisfactory pace?

What did you think of the Consultant's presentation and training methods?

What suggestions can you make for improvement?

What did you think of the Consultant's knowledge of the subject area?

May we use your name and/ or comments in promotional material?

Please return to Michelle.Tyler@capita.co.uk quoting '#Evaluation Forms' (as written) in the subject field. Thank you.