

Tonbridge and Malling achieve greater efficiency through IDOX revenues and benefits solution

Introduction

Tonbridge and Malling Borough Council's (TMBC) Revenues and Benefits department has been a top quartile performer for many years. And when they decided to modernise their back office processes with a Document Management and Workflow system, staying in this exclusive club was at the top of their wish list.

In June 2005, TMBC identified IDOX as the ideal partner to achieve this. With IDOX's integrated, web based, user friendly workflow software, the migration from a paper based to a fully e-enabled office was seamless and without detriment to their strong performance.

“The IDOX system has helped us to improve the efficiency and effectiveness of our Revenue and Benefits Teams.”

Paul Griffin - Revenues and Benefits Manager TMBC

Workflow Management

IDOX's process based workflow module allowed TMBC to automatically allocate work to sections of users by pre-set system parameters, without the need for manual intervention. This enabled TMBC to redirect management resources away from allocation and on to areas that would further improve their speed and accuracy of claims processing and Council Tax recovery.

The key benefits experienced by TMBC were:

- Automated prioritisation of work based on target dates and document types.

- Automated linking of documents, which removes need to match forms with evidence and ensures that double counting for management reporting does not occur
- Sophisticated Quality Assurance functionality, which allows users to select which percentage of each officer's work they wish to check. And shortly this will be extended to select a particular work type for enhanced checking e.g. self employed claims.
- A future development will see intelligent allocation features that allow managers to select particular users to be excluded from receiving particular work type's e.g. new starter excluded from receiving new claims.



Integration

Northgate, who supply i-World to TMBC, are business partners and re-sellers of IDOX software. The close links between the two companies makes integration of business processes seamless and easy to achieve. Basic manual tasks become automated, resulting in efficiency savings and ultimately a quicker service to customers.

The key benefits to TMBC were:

- **Synchronised applications** - at the press of a button the two systems are able to display the same case without the need for duplicate searches.
- **Two Tier indexing** - Claim and account details from i-World are downloaded into IDOX each day so that indexers only need to enter the case reference number to populate the document with all the relevant details i.e. name, address, NINO, etc. Alternatively IDOX software has the potential to will look directly into i-World and extract data in real-time. This prevents having to wait until the next day to index or having to set up a temporary reference number.

CASE
STUDY

- **Suppression of recovery** - A feature that is being developed at present will enable TMBC to automatically suppress recovery of revenues accounts that are at the latter stages of recovery i.e. Bailiffs. The correspondence is then prioritised and allocated to a user to deal with immediately. The same feature can be deployed in the Benefits Department for E.T.D cancellation notices i.e. the benefits case is suspended, resulting in a reduction of overpayments.

Management Reporting

TMBC were very keen to be able to extract data from the system through user friendly, easy to access management reports. TMBC listed the reports that they required in order to run the service and adhere to specific requirements of the DWP Performance Standards.

In partnership with TMBC, IDOX developed a suite of reports that enabled TMBC to monitor the following:

- **Volumes of incoming work** - This report does not count documents. It counts actual work items. Therefore removing double counting of forms and documentary evidence.
- **Outstanding work** - This report tells end users what work is outstanding, whether it is overdue, and who is dealing with it.
- **User Performance** - Each action of every user is recorded on this management report. Managers can see how many work items have been completed, how many work items have been sent to pending, and any other system action that has taken place.

“Improved management information has allowed us to target resources more effectively and greatly contributed to our customer service agenda.”

Paul Griffin - Revenues and Benefits Manager TMBC

Conclusion

TMBC are fully operational with both Document Management and Process based workflow. The installation has resulted in the Council taking huge strides forward in terms of improving efficiency and automating many previously manual processes.

TMBC are now able to view case files from multiple locations and allow multiple users to access case files at the same time. Allocation and prioritisation of work is now completely automated meaning that management time can be focused elsewhere.

The Quality Assurance module has enabled TMBC to highlight training needs amongst staff, and ultimately drive up the accuracy of undertaken work.

TMBC was already recovering 98.6% of Council Tax in 04/05, however the collection rate has increased to 98.7% for 05/06 and the outturns for 06/07 are very positive.

“We are confident that the installation of the system has put us in a stronger position to take on further developments for the benefit of the Borough's residents.”

Paul Griffin - Revenues and Benefits Manager TMBC

Top quartile performance across Revenues and Benefits is being achieved and with further future developments planned, the future looks positive for the IDOX/TMBC partnership.

To reach marketing for IDOX, please email marketing@IDOXplc.com or call 0141 574 1910.

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