TORBAY COUNCIL

Appendix F
Tax Collection & Benefits Requirements

Contract Reference

TTRAN3220

Contract Title

Customer Relationship Management (CRM) System

1   Information

If a bidder's proposed solution includes the replacement of the Council's Revenue and Benefits system, please refer to the requirements stated below for the additional requirements for this system.

2   Specific Requirements

Ref	Must / Should / Could / Wont	Requirement
1	Must	Account for all incoming and outgoing Council Tax (C Tax), Non-domestic rates (NDR) and Housing Benefit (HB) transactions
2	Must	Manage Housing Benefit debt recovery
3	Must	Calculate Council Tax and NDR Liabilities in accordance with Government legislation
4	Must	Calculate Housing Benefit and Council Tax Support Entitlement in accordance with Government legislation
5	Must	Output data files for Council Tax and NDR bills - electronic or printed
6	Must	Output data files for Housing Benefit notification letters - electronic or printed
7	Must	Award Discretionary Housing Payments and Local Welfare Provision (Crisis Support)
8	Must	Output statistical data for Government returns
9	Must	Process Business Improvement Districts (BID)
10	Must	Enable updates to residents C Tax or NDR accounts through a website portal
11	Must	Import and export data files for Housing Benefit administration
12	Must	Facility to administer Council Tax, NDR and HB overpayment recovery processes
13	Must	Be able to accommodate legislative changes at short notice
14	Must	Have multiple ways to search records within property and person
15	Should	Interface with financial and cashiering systems
16	Should	Pass data to Electronic Document Management System (EDMS) so that reference numbers corresponds in both systems
17	Should	Have the facility to run programs overnight
18	Should	"Easy" to configure and can be adapted to current working processes that are controlled by parameters
19	Should	Be able to interrogate records in order to extract information for forecasting and to assist with FOI requests
20	Should	Processing system and EDMS should contain a unique customer identification number common to both systems to prevent duplicate person records and to assist with progress of a single view of customer data base