

NOTES ABOUT NAMES AND ADDRESSES FOR COMMUNITY CHARGE AND RATES

- 1). Please read the attached report specifying amendments to be made to X00, the Rates Names Enquiry Transaction which will be used for Community Charge names. TOP have requested that each User Group that is responsible for applications that use Name Matching formally accept the report's recommendations.
- 2). Currently, addresses are all held on a central Property Index, arranged in alphabetical Street Name order, with the individual properties held under the streets in the order that they were originated. Each Application can be linked to an address, and the order that the properties are referenced within that application is determined by the Application Reference.
- 3). 'Identical' addresses on different Applications can either be attached to the same address on the Index, or to different addresses that have the same details, which can occur when a user is originating a new property for his own Application and rejects any existing matches on other Applications.
- 4). Amendments to addresses are dealt with in two ways.
 - a). If the Rates address is changed, then all other Applications that are linked to the same address are also changed.
 - b). If any other address is changed, a new address is created on the Index, and any other Applications remain on the old address.
- 5). Community Charge will be made equal to Rates, and so an amendment to a Community Charge address will amend all other Applications that are linked to the same address, including Rates, and so care will be needed when both Rates and Community Charge details are initially on the same address and one needs changing. The recommended method is to originate a new account and close the old one after moving the details over.
- 6). Names will continue to be independent in each Application. Within Community Charge, any changes to the Responsible Person name will amend a linked Account name, and vice versa. Extra name details will remain independent. At take-on, the Rates extra name will be carried over, if it exists, and similarly Council Tenant extra name.
- 7). Communications Addresses are also independent for Responsible Person and Account, but will move with the name if it is changed. Take-on will act as for extra name.
- 8). The recommended Post Office order to maximise posting discounts is to produce packets in numerical order within alphabetical street within Postal District (the left part of the Post-code e.g E1, N22, UX4, EC1A). We propose to set properties up in numerical order with spaces between references at the initial take-on; postal sorting will be performed before all mailings. It will be the responsibility of the user to enter the Post Code when originating new properties and streets, and when setting up Communications Addresses.

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