

Rating system - System Outline

Online Functions

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RATM005          RATING SYSTEM - NAME AND ADDRESS SEARCH          PANEL 1
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RATEPAYER SURNAME : @.....| OR
HOUSE NO @...| STREET NAME @.....| PARISH @.|
-----
PROPERTY REF@.| @...| @...| @.| @...|RV@.....| RATEPAYER PID@.....|
DESCRIPTN@.....| @.....| @.....|
@.....| @.....|
PROPERTY ADDRESS          RATEPAYER ADDRESS IF DIFFERENT
PROP NAME@.....| @.....|
PROP NO @.....| @.....|
SUBSTREET@.....| @.....|
STREET @.....| @.....|
DISTRICT @.....| @.....|
TOWN @.....| @.....|
COUNTY @.....| @.....|
POSTCODE @.....| @.....|
-----
NEXT PANEL @.|
PF1=HELP PF3=MAIN MENU PF7=PREVIOUS REF PF8=NEXT REF
@.....|
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1 Name and address search

- 1 Search on ratepayer name
- 2 Search on property address
- 3 Move to selected panel

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RATM010          RATING SYSTEM - RATEPAYER DETAIL          PANEL 2
RATEPAYER REF@....|          1ST PROPERTY REF @.| @...| @...| @.| @...|
+-----+
RATEPAYER      @.....| @.....| @.....|
ALT RATEPAYER @.....| @.....| @.....|
POSTAL ADDRESS          ACCOUNT SUMMARY
HOUSE NM @.....| ARRS/CREDITS BF @.....|.e.|
HOUSE NO @.....| INITIAL DEBIT @.....|.e.|
SUBSTREET@.....| TOTAL OTHER DR @.....|.e.|
STREET @.....| TOTAL OTHER CR @.....|.e.|
DISTRICT @.....| OTHER CHARGES @.....|.e.|
TOWN @.....| COSTS @.....|.e.|
COUNTY @.....| REFUNDS @.....|.e.|
FINAL NOTICE @.| /@.| /@.| WRITE OFFS @.....|.e.|
INST REMDR 1 @.| /@.| /@.| PAID TO DATE @.....|.e.|
CANC LETTER @.| /@.| /@.| BALANCE O/S @.....|.e.|
SUMMONS DATE @.| /@.| /@.| LATEST ACC @.....|.e.| DATE @.| /@.| /@.|
WARRANT DATE @.| /@.| /@.| PAYMENT METHOD @| PAY METH NEXT YR @|
COPY ACCOUNT REQD ? @|
PF1=HELP PF3=MAIN MENU PF4=PROPERTY PF5=PAYMENTS PF6=RECOVERY PF9=COMMENTS
@.....|
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2 Ratepayer detail panel

- 1 Display ratepayer details and summary account
- 2 Request copy account
- 3 Amend latest account amount and date and Pay method next year
- 4 Move to ratepayer comments panel

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RATM020                                RATING SYSTEM - PAYMENT DETAIL                                PANEL 3
RATEPAYER REF @.....|                 1ST PROPERTY REF @.| @...| @...| @.| @...|
-----
RATEPAYER @.....| @.....| @.....|
PAYMENT DETAILS @| DIRECT DEBIT DETAILS
PAYMENT METHOD @| BANK SORT CODE @.....|
NO OF INSTALMENTS @.| ACCOUNT NO @.....|
1 INST OF @.....| .@.| ACCOUNT NAME @.....|
@ | INSTS OF @.....| .@.| MANDATE START @.| /@.| /@.|
1ST INST DUE@.| /@.| /@.| DUPLICATE INST DOCUMENTS REQUIRED? @|
-----
TYPE OF TRANS @..| AMOUNT OF TRANS @.....| .@.| @|
-----
TRANSACTION DETAILS
@.| @.| @.| @.| @.....| @.....| .@.| @.| @.| @.| @.....| @.....| @.....| .@.|
@.| @.| @.| @.| @.....| @.....| .@.| @.| @.| @.| @.....| @.....| @.....| .@.|
@.| @.| @.| @.| @.....| @.....| .@.| @.| @.| @.| @.....| @.....| @.....| .@.|
@.| @.| @.| @.| @.....| @.....| .@.| @.| @.| @.| @.....| @.....| @.....| .@.|
@.| @.| @.| @.| @.....| @.....| .@.| @.| @.| @.| @.....| @.....| @.....| .@.|
@.| @.| @.| @.| @.....| @.....| .@.| @.| @.| @.| @.....| @.....| @.....| .@.|
@.| @.| @.| @.| @.....| @.....| .@.| @.| @.| @.| @.....| @.....| @.....| .@.|
@.| @.| @.| @.| @.....| @.....| .@.| @.| @.| @.| @.....| @.....| @.....| .@.|
PF1=HELP PF3=MENU PF4=PROPTY PF5=RATEPAYR PF6=RECVY PF7=PYT BACK PF8=PYT FORWD
@.....|

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3 Payment detail panel

- 1 Display payments and payment details
- 2 Update payment details
- 3 Calculation of instalments
- 4 Input adjustments to accounts
- 5 Initiate duplicate instalment documents

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RATM030          RATING SYSTEM - RECOVERY PANEL          PANEL 4
+-----+
RATEPAYER REF : @...| 1ST PROPERTY REF @.| @...| @...| @.| @...|
+-----+
RATEPAYER @.....| @.....| @.....|
RECOVERY DETAILS :   DATE          AMOUNT
FINAL NOTICE   @.| /@.| /@.| @.....| .@.|
INST LETTER     @.| /@.| /@.| @.....| .@.| ARREARS REASON CODE @.|
CANC LETTER     @.| /@.| /@.| @.....| .@.|
SUMMONS         @.| /@.| /@.| @.....| .@.| USE ALT RATEPAYER ? @|
WARRANT         @.| /@.| /@.| @.....| .@.|
+-----+
ALT RATEPAYER @.....| @.....| @.....|
@.....|
PROP NAME @.....|
PROP NO   @.....|
SUBSTREET @.....|
STREET   @.....|
DISTRICT @.....|
TOWN     @.....|
COUNTY @.....|
POSTCODE @.....|
PF1=HELP PF3=MENU PF4=PROPTY PF5=RATEPAYR PF6=PAYT PF7=PREV PF8=NEXT PF9=NOTES
@.....|
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4 Ratepayer recovery panel

- 1 Display recovery details
- 2 Update recovery details
- 3 Update alternate ratepayer
- 4 Move to Ratepayer comments panel

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RATM040          RATING SYSTEM - PROPERTY DETAIL          PANEL 5
PROP REF@. | @... | @... | @. | @... | RATEPAYER REF:@... |
+-----+
PARISH          @. | RATEPAYER:@..... | @..... | @..... |
INC TEN IND     @ | HOUSE NAME:@..... |
CURRENT         @ | VOID:@ | HOUSE NO:@..... |
EXPEND CODE @..... | SUBSTREET:@..... |
OCC THIS YEAR   @ | STREET:@..... |
DESCRIPTION CODE @. | DISTRICT:@..... |
@..... | TOWN:@..... |
@..... | COUNTY:@..... |
DATE OCCUPIED @. | /@. | /@. | POSTCODE:@..... |
DATE VACATED @. | /@. | /@. |
+-----+
                ASSESSMENT DETAILS
GV          DIRECTED   PROPOSED   ESTIMATED   EFF DATE@. | /@. | /@. |
NAV         @..... | @..... | @..... | DIR NO@..... |
RV          @..... | @..... | @..... | ANYS CODE@..... | OBJ IND @ |
                @..... | @..... | @..... | PROPERTY CLASSE | TOR IND @ |
+-----+
S40 MAND RELIEF @... | INSTN RV @..... | CENTRAL H RV @. | GGE,PARK RVE. |
S40 DISC RELIEF @... | ADDT ROOM RV @. | WHEELCHR RV @. | EFF FRM@..... |
EFF DATE @..... | BATH,TOILT RVE. | OTHER FAC RV @. |
PF1=HELP PF3=MENU PF4=RTEPAYR PF5=ACC SUMM PF6=PROP TRANS PF7=PREV PROP PF8=NEX
@..... |
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5 Property detail panel

- 1 Display property details
- 2 General updating
- 3 Update assessment details
- 4 Recalculation of debit on change in RV
- 5 Automatic recalculation of instalment amounts
- 6 Automatic initiation of instalment documents
- 7 Automatic initiation of account documents
- 8 Changes to Property class
- 9 Vacation of Property

RATM050

RATING SYSTEM - PROPERTY ACCOUNT SUMMARY

PANEL 6

PROP REF :@. | @... | @... | @. | @... | RATEPAYER REF :@..... |

RATEPAYER:@..... | @..... | @..... |

CREDITS			DEBITS		
REDUCED ASSESSMENTS	@.....	.@.	INITIAL DEBIT	@.....	.@.
VOID ALLOWANCES	@.....	.@.	REDEBIT	@.....	.@.
STANDARD HOUSING BENEFIT	@.....	.@.	ADDITIONAL DEBIT	@.....	.@.
CERTIFICATED HSG BENEFIT	@.....	.@.	OTHER CHARGES	@.....	.@.
DISABLED PERSONS REBATE	@.....	.@.			
S.40 MANDATORY RELIEF	@.....	.@.	TOTAL DEBITS	@.....	.@.
S.40 DISCRETIONARY RELIEF	@.....	.@.			

TOTAL CREDITS @..... | .@. | LESS TOTAL CREDITS@..... | .@. |

BALANCE@..... | .@. |

PF1=HELP PF3=MENU PF4=RATEPAYR PF5=PROPERTY PF6=PROP TRANS PF7=PREV PR PF8=NEX  
@..... |

6 Property Account summary

1 Display Property Account details

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RATM060                                RATING SYSTEM - PROPERTY TRANSACTION                                PANEL 7
PROP REF@.| @...| @...| @.| @...| RATEPAYER REF@....|
-----
RATEPAYER @.....| @.....| PROPERTY@.....|
@.....| @.....|
-----
TYPE OF TRANS ? @..|
AMOUNT OF TRANS @.....| .@.| @|
-----
                                TRANSACTION DETAILS
@.|@.|@.|@.....|@..|@.....|@.|@.|@.|@.....|@..|@.....|@..|
@.|@.|@.|@.....|@..|@.....|@.|@.|@.|@.....|@..|@.....|@..|
@.|@.|@.|@.....|@..|@.....|@.|@.|@.|@.....|@..|@.....|@..|
@.|@.|@.|@.....|@..|@.....|@.|@.|@.|@.....|@..|@.....|@..|
@.|@.|@.|@.....|@..|@.....|@.|@.|@.|@.....|@..|@.....|@..|
@.|@.|@.|@.....|@..|@.....|@.|@.|@.|@.....|@..|@.....|@..|
@.|@.|@.|@.....|@..|@.....|@.|@.|@.|@.....|@..|@.....|@..|
@.|@.|@.|@.....|@..|@.....|@.|@.|@.|@.....|@..|@.....|@..|
@.|@.|@.|@.....|@..|@.....|@.|@.|@.|@.....|@..|@.....|@..|
@.|@.|@.|@.....|@..|@.....|@.|@.|@.|@.....|@..|@.....|@..|
@.|@.|@.|@.....|@..|@.....|@.|@.|@.|@.....|@..|@.....|@..|
PF1=HELP PF3=MENU PF4=RATEPAYR PF5=PROPTY PF6=ACC SUMM PF7=TRANS BACK PF8=FORW
@.....|
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7 Property Transaction Panel

- 1 Display Property transactions
- 2 Input transactions
- 3 Recalculation of debit
- 4 Recalculation of instalments
- 5 Automatic initiation of instalment documents
- 6 Automatic initiation of account documents

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• RATM080          RATING SYSTEM - CREATE OR AMEND RATEPAYER          PANEL 8.1
+-----+
RATEPAYER REF@....| 1ST PROPERTY REF @.| @...| @...| @.| @...|
+-----+
ACTION@| C = CREATE , A = AMEND
        RATEPAYER NAME
TITLE @.....| INITIALS @.....| SURNAME @.....|
        @.....|
        RATEPAYER ADDRESS IF DIFFERENT FROM PROPERTY ADDRESS

        PROP NAME@.....|
        PROP NO @.....|
        SUBSTREET@.....|
        STREET @.....|
        DISTRICT @.....|
        TOWN @.....|
        COUNTY @.....|
        POSTCODE @.....|

PAYMENT METHOD @|
PAYMENT METHOD NEXT YEAR @|

PF1=HELP PF3=MAIN MENU PF4=SUB MENU PF5=CREATE PROPERTY PF6=REOCCUPATION
@.....|
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8 Create or amend ratepayer

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- 1 Create temporary new ratepayer
- 2 Calculate check digits for PID
- 3 Link to occupation panel
- 4 Amend ratepayer



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* RATM090          RATING SYSTEM - REOCCUPATION          PANEL 8.2
+-----+
RATEPAYER REF @....|  PROP REF @.| @...| @...| @.| @...|
+-----+

RATEPAYER          HOUSE NAME:@.....|
@.....| @.....|    HOUSE NO:@.....|
@.....|            SUBSTREET:@.....|
                  STREET:@.....|
                  DISTRICT:@.....|
                  TOWN :@.....|
                  COUNTY:@.....|
                  POSTCODE:@.....|

DATE OCCUPIED @.| /@.| /@.|    IS THE ABOVE RATEPAYER
                               POSTAL ADDRESS? @|

PF1=HELP  PF3=MAIN MENU  PF4=SUB MENU
@.....|
+-----+

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9 Reoccupation panel

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- 1 Link Ratepayer and property
- 2 Calculation of debit
- 3 Calculation of instalments
- 4 Automatic initiation of instalment documents
- 5 Automatic initiation of account documents
- 6 Calculation of check digits on increase in occupation number
- 7 Update RBWM Person Database

```

PROP REF@.| @...| @...| @.| @...| HOUSE NAME:@.....|
ACTION@| C = CREATE A = AMEND HOUSE NO:@.....|
SUBSTREET:@.....|
PARISH @.| STREET:@.....|
INC TEN IND @| DISTRICT:@.....|
EXPEND CODE @.....| TOWN:@.....|
DESCRIPTION CODE @.| COUNTY:@.....|
DESCRIPTION POSTCODE:@.....|
@.....|
@.....|
    
```

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                ASSESSMENT DETAILS
DIRECTED      PROPOSED      ESTIMATED      EFF DATE@.| /@.| /@.|
GV            @.....| @.....| @.....| DIR NO@.....|
NAV          @.....| @.....| @.....| ANYS CODE@.....| OBJ IND @|
RV           @.....| @.....| @.....| PROPERTY CLASSE| TOR IND @|
    
```

PF1=HELP PF3=MAIN MENU PF4=SUB MENU PF5=CREATE RATEPAYER PF6=REOCCUPATION

@.....|

10 Create or amend property

- 1 Create temporary new property validating against streets table
- 2 Calculate check digit for property reference
- 3 Amend property - validation of amendments





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RATM150          RATING SYSTEM - PREVIOUS YEARS ACCOUNTS          PANEL 1
RATEPAYER REF @....| @|          1ST PROPERTY REF @.| @...| @...| @.| @...| @|
+-----+
@.....| @.....|          PROPERTY ADDRESS          RV
@.....| @.....|          @.....|          DI/PR/E
RATEPAYER ADDRESS          @.....|          @.....|
@.....| @.....|          @.....|          @.....|
@.....| @.....|          @.....|          @.....|
PAYMENT TOTAL @.....| .@.| PROP TOTAL @.....| .@.| BALANCE @.....| .@.|
+-----+
PAYMENTS          AR/CR @.....| @.| PROPERTY AC CNT @.| @...| @...| @.| @...|
+-----+
@.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.|
@.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.|
@.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.|
@.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.|
@.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.|
@.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.|
@.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.|
@.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.|
@.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.| @.|
PF1=HELP PF3=MENU PF4=RATEPAYR PF5=PROPERTY PF7=BACK PF8=FORWD
@.....|
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12 Previous Years Accounts panel

1 Display previous years accounts

## Batch Functions

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### Daily

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- 1 Print Amended Rate Accounts
- 2 Print Amended Instalment Documents
- 3 Update Cash
- 4 Update Housing Benefits from Housing Benefit System (under development)
- 5 Daily Balance Calculation
- 6 Vacations and Occupations report

### Monthly

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- 1 Direct Debit Validation
- 2 Direct Debit Calculation
- 3 Instalment reminders
- 4 Instalment Cancellations

### When required by rating section

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- 1 Final Demands
- 2 Pre-Summons production
- 3 Summons production
- 4 Distress Warrant production

### End of Year closedown

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Under development