

# Cabinet Office

## Office of the e-Envoy



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# Schema Requirements

## View Council Tax Account



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## Document Control

### Abstract

This document describes the requirements for message data within the View Council Tax e-service. The messages are to be defined using XML schemas.

### Current Version

Date	Version	Status	Editor	Comment
5 March 2002	0.4			Updated following further discussion from Sedgemoor D.C and Sunderland C.C and the Office of the e-Envoy

### Authorisation

<b>Name</b>	
<b>Organisation</b>	
<b>Date</b>	

### Change History

Date	Version	Status	Editor/ Author	Comment
3 October 2001	0.1	Draft	Tim Benson	Circulated and discussed by workshop attendees, schema drafted
28 January 2002	0.2	Draft	Anna Harvey	Updated to reflect additional requirements from DTLR consultation paper and following review of draft schema
30 January 2002	0.3	Draft	Anna Harvey	Updated to reflect comments from Paul Davidson, Sedgemoor D.C

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## 1. History and Purpose of this Document

This report has been prepared following the workshop held at Office of the e-Envoy (OeE), Victoria on 2-3 October 2001 and the schema review meeting on 9 January, and subsequent discussions. It deals only with the schema requirements for view council tax account details. In particular this document does not consider how gateway interaction will be carried out, which is the topic of a separate requirements-gathering exercise, published for discussion in the e-government toolkit area on IDEAKnowledge as "Local Authority Gateway requirements and proposed way forward for Registration, Enrolment and Transaction Routing"

The workshop group comprised:

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## 2. Problem Definition

To provide a facility for a Council Tax Account Holder or their authorised agent to be able to see their account details. Each authority will be able to select and present data to fit their own styling and policies, so for example a stylesheet may be used to hide information contained in the standard message which an authority does not wish to reveal. Flexibility will be provided

in the message content to allow for variations across authorities in data available in their existing systems.

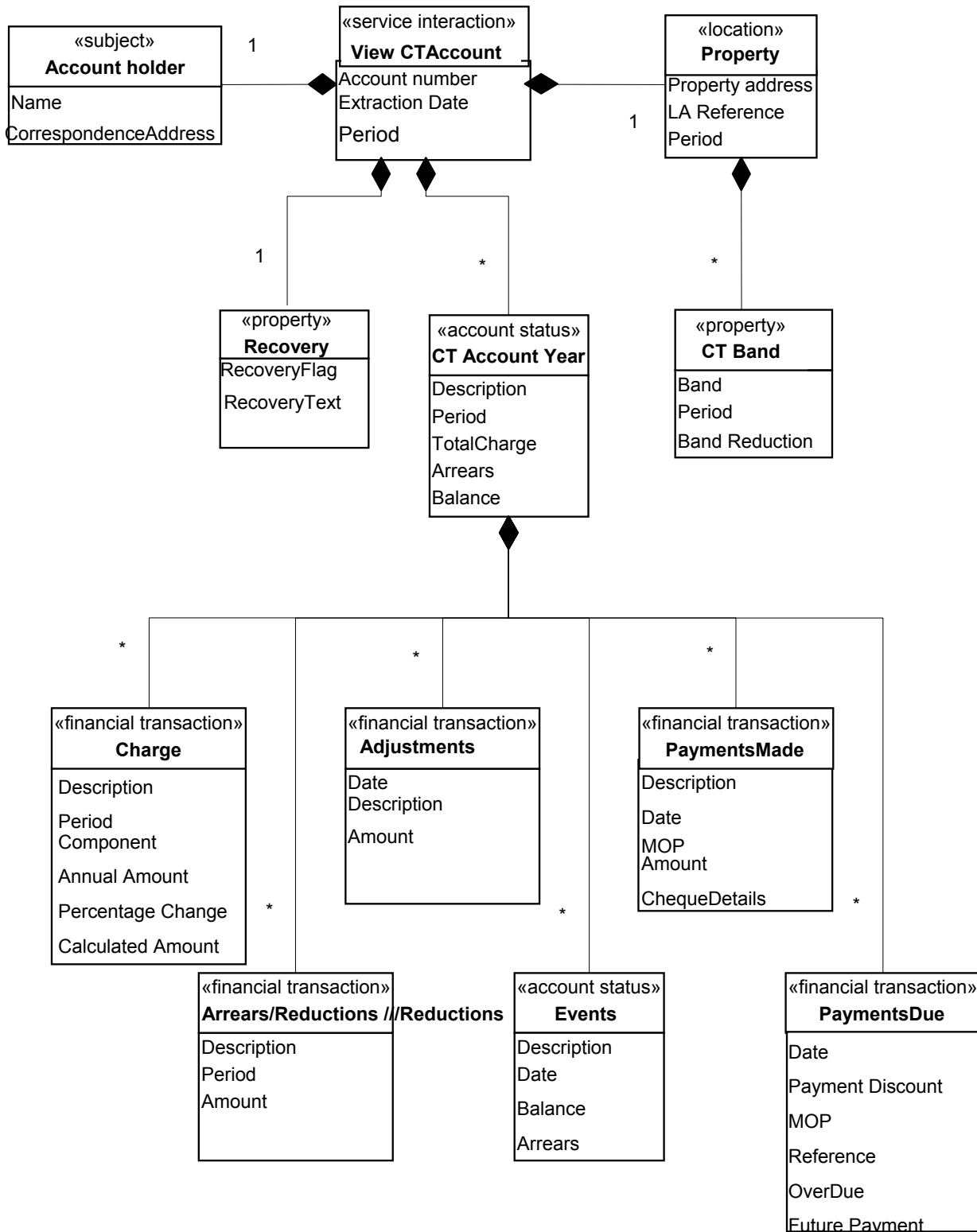
### **3. Scenario**

- User identifies him/herself using user ID and password or digital certificate.
- Submits request for CT account details
- Sees list of CT accounts and selects one
- Sees summary of that CT account
- Sees details of account by year.

For draft Process Descriptions and Process Diagrams, please refer to the OeE document “Council Tax View Schema Requirements” version 0.2 developed following the workshop. These will be revised as a separate exercise from this schema specification.

### 4. Classes

Figure 1 Class Diagram for CT Account Messages. Note that this is a model of the message, not the real world. In the message, there are one to one relationships between account, account holder and property, although this is not so in the real world.



## **5. Messages**

Information will be retrieved from the Local Authority system to a portal in two standard XML messages, which will be defined as schemas:

- List of CT Accounts
- Single CT Account Status and Year Details

Each of these messages will be delivered from the portal to the User displayed in a format customised for each authority, using a stylesheet in combination with the authority's own template.

## **6. End-User Views**

During the initial workshop session, it was agreed that a logical division into screens should deliver a list of available accounts, followed by the summary for a selected account over all account years, followed by detail by account year. Each authority will have the ability to decide in detail which data is to be presented, and for example whether to automatically direct the user to the current year followed by other years as requested, or whether to show details of all years together.

### **List of CT Accounts**

This will include the following data:

- Extraction Date and Time
- Account Holder Name
- Correspondence Address(es) (which may be abroad and may be confidential)

For each Account:

- Council Tax Account No
- Property Address (5 lines + Postcode or BS7666 address)
- Start date of account
- End date (if applicable)
- Recovery flag, indicating that account is subject to recovery procedures. and optional explanatory text
- Pending text(s) if a request is awaiting decision

### **Account Current Summary**

This includes the following data items:

- Extraction Date and Time

- Account Number
- Account Holder Name(s)
- Optional Local Authority Reference
- Property Address (5 lines + Postcode)
- Property Band (current)
- Account start date
- Account end date (if applicable)
- Number of days of account (optional)
- Account in Recovery flag
- For each year:
  - Year period Description e.g 2001-02, optional
  - Year dates
  - Bands and their periods during the year
  - Current Year Charge
  - Current Year Balance
  - Current Year Arrears

### ***Year Details***

This includes the following items:

- Extraction Date and Time
- Account No
- Account Holder Name (s)
- Property Address (5 lines + Postcode)
- Period covered start date
- Period covered end date (optional)
- Period number of days (optional)
- Property Band (for each change of band during year)
  - Property Band
  - Band start date
  - Band end date
  - Band number of days
  - Band Reduction (optional)
- Total Charge (for each change of band during the year)
- Description
- Period
- Number of days in period



- For each charge calculation component
  - Charge component description (may state annual charge)
  - Period
  - Charge component preceptor description
  - Annual amount for this preceptor
  - Percentage change to amount (optional)
  - Calculated charge pro-rated for the period
- For each account adjustment
  - Date of adjustment
  - Description
  - Adjustment amount
- Total Reduction
- For each type of reduction and period
  - Reduction description
  - Reduction period (optional) and duration
  - Reduction amount calculated
- Net Total due (Charges plus Debits less Reductions)
- Payments made Total amount
- Payments Made
  - Description (optional)
  - Payment date
  - Method of Payment
  - Payment amount
  - Cheque Details (optional)
- Arrears
  - Date
  - Description
  - Amount
- Payments due Total balance to end of period
- Payments Due
  - Method of Payment
  - Payment due date
  - Each overdue amount
  - Each future amount
  - Discount (optional) for early payment

- Reference (optional)
- Events on the account- for each:
  - Description
  - Date
  - Balance (optional)
  - Arrears (optional)

## 7. Interoperability

Standard architectural components and data definitions which already exist within the Govtalk framework are used in the Council Tax schemas. New items with wider significance will be fed back into GovTalk. The following table maps elements of the Council Tax schema to existing schemas and to the Government Data Standards Catalogue (GDSC) version 1.1.

<b>View Council Tax schema component</b>	<b>Govtalk schema</b>	<b>GDSC equivalent</b>
A_5LineAddress	Address and Personal Details	Simple Address
AccountDates	CTView	
AccountHolder	Address and Personal details	Person Full name
AccountList	CTView	
AccountNumber	CTView	
AccountsHeld	CTView	
AccountView	CTView	
AccountYear	CTView	
Adjustment	CTView	
AdministrativeArea	Address and Personal Details	Administrative area
Amount	CTView	Currency Type used
Annotation		
Arrears	CTView	
Arrears	CTView	
Balance	CTView	Currency Type used
Band	CTView	
BLPUendDate	BS7666	
BLPUentryDate	BS7666	Basic Land and Property Unit
BLPUextent	BS7666	
BLPUlastUpdateDate	BS7666	

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BLPUstartDate	BS7666	
BS7666Address	BS7666	BS7666 Address
BS7666Address	BS7666	BS7666 Address
BS7666Address	BS7666	
BS7666BLPU	BS7666	BLPU (Basic Land and Property Unit)
CalculatedAmount	CTView	Currency Type used
ChargeComponent	CTView	Currency Type used
ChequeDetails	CTView	UK Cheque Number
CitizenNameForename	Address and Personal Details	Person Given Name
CitizenNameRequestedName	Address and Personal Details	Person Requested Name
CitizenNameSuffix	Address and Personal Details	Person Name Suffix
CitizenNameSurname	Address and Personal Details	Person Family Name
CitizenNameTitle	Address and Personal Details	Person Title
CorrespondenceAddress	Address and Personal Details	International Address
Country	Address and Personal Details	
CTBand	CTView	
CurrentBand	CTView	
CustodianCode	BS7666	
Date	CTView	Date
Description	CTView	
DescriptiveIdentifier	BS7666	
Discount	CTView	
DueNow	CTView	
ElementaryStreetUnit	BS7666	
EndCoordinate	BS7666	
EndDate	CTView	Date
ESUclosureDate	BS7666	
ESUentryDate	BS7666	
ESUidentity	BS7666	
ESUversion	BS7666	

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Event	CTView	
ExtentDefinition	BS7666	
ExtentEndDate	BS7666	
ExtentEntryDate	BS7666	
ExtentLastUpdateDate	BS7666	
ExtentSourceDate	BS7666	
ExtentStartDate	BS7666	
ExternalRef	BS7666	
ExtractionDate	CTView	
GridReference	BS7666	
IntAddressLine	Address and Personal Details	
IntermediateCoord	BS7666	
InternationalPostCode	Address and Personal Details	
LandAndPropertyIdentifier	BS7666	
Level	BS7666	
Line		
Locality	BS7666	Locality
LogicalStatus	BS7666	
LPIendDate	BS7666	
LPIentryDate	BS7666	
LPIlastUpdateDate	BS7666	
LPIstartDate	BS7666	
MOP	CTView	
Name	Address and Personal details	Person Full name
NumberofDays	CTView	
OfficialAddressMarker	BS7666	
OtherDebit	CTView	
OtherDebitDesc	CTView	
PAON	BS7666	Primary Addressable Object Name
PaymentDiscount	CTView	
PaymentDue	CTView	
PaymentMade	CTView	
Pending	CTView	

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PercentageChange	CTView	
Period	CTView	
PolygonID	BS7666	
PolygonType	BS7666	
Postcode	Address and Personal Details	Postcode
PostTown	BS7666	Town
Property	CTView	
PropertyAddress	Address and Personal details	Address or BS7666 address
Provenance	BS7666	
ProvenanceCode	BS7666	
ProvEndDate	BS7666	
ProvEntryDate	BS7666	
ProvLastUpdateDate	BS7666	
ProvStartDate	BS7666	
Recovery	CTView	
RecoveryFlag	CTView	
RecoveryText	CTView	
RepresentativePointCode	BS7666	
ResponsibleAuthority	BS7666	
SAON	BS7666	Secondary Addressable Object Name
SortCode	BS7666	
SourceDescription	BS7666	
StartCoordinate	BS7666	
StartDate	CTView	Date
Street	BS7666	
StreetAlias	BS7666	
StreetClosureDate	BS7666	
StreetCrossReferences	BS7666	
StreetDescription	BS7666	Street Name
StreetDescription	BS7666	
StreetEntryDate	BS7666	
StreetReferenceType	BS7666	
StreetVersionNumber	BS7666	

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Tolerance	BS7666	
TotalCharge	CTView	
TotalDiscount	CTView	Currency Type used
TotalDue	CTView	Currency Type used
TotalPayment	CTView	Currency Type used
Town	BS7666	Town
UniquePropertyReferenceNumber	BS7666	UPRN
UniqueStreetReferenceNumber	BS7666	Unique Street Reference Number
Vertices	BS7666	
WalkSort	BS7666	
X	BS7666	
Y	BS7666	
Year	CTView	
YearCharge	CTView	Currency Type used
YearDescription	CTView	
YearPeriod	CTView	

### **8. Approval**

Approval for the resulting schema has been given by the two lead authorities, Sunderland and Sedgemoor. Wider consultation with interested authorities is requested via a GovTalk forum ([www.govtalk.gov.uk](http://www.govtalk.gov.uk)) set up for this topic, where all documents are published on 6<sup>th</sup> March 2002, and the Local Authorities Gateway Engagement (**LAGE**) meeting on 20<sup>th</sup> March 2002.