Cabinet Office

Office of the e-Envoy

Schema Description
View Council Tax Account

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Abstract
This document describes the schema developed for View Council Tax e-service. It is accompanied by the schema itself and sample message instances, and is based on a statement of requirements in "View Council Tax Schema Requirements v0.3" and subsequent discussions

Current Version				
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22 February 2002	0.3	Draft	Anna Harvey	Updated based on comments from Paul Davidson, Sedgemoor and Mark Chapman, Sunderland

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Contents

History and Purpose of this Document

This report has been prepared to accompany an XML schema for view council tax account details. It reflects requirements discussed and documented following meetings with Local Authority representatives. The schema attempts to provide a balance of the control available from schema definitions with flexibility for each Authority to use its own policies and practices.

AccountsHeld message

This sample instance of the View Council Tax AccountsHeld message illustrates the corresponding features of the View Council Tax schema definition and how it may be used. This message can be used to display a summary of all accounts and their current status, formatted according to the requirements and policies of each local Authority.

```
<AccountsHeld xmlns="http://www.govtalk.gov.uk/LG/CTView"
xmlns:apd="http://www.govtalk.gov.uk/people/AddressAndPersonal
Details"  xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance"
xsi:schemaLocation="http://www.govtalk.gov.uk/LG/CTView
CTView-v0.4.xsd" SchemaId="CTView" SchemaVersion="0.4">
```

The root element in this case is AccountsHeld, and contains the schema and namespace references and required attributes SchemaID and SchemaVersion.

```
<ExtractionDate>2001-01-29T09:30:47-05:00</ExtractionDate>
```

ExtractionDate is a date and time stamp for when the data displayed was extracted from the Local Authority's main Council Tax in-house system.

```
        <Name>
                <PersonName>

        <apd:CitizenNameTitle>Mr</apd:CitizenNameTitle>

        <apd:CitizenNameForename>William</apd:CitizenNameForename
>

        <apd:CitizenNameSurname>Goldfish</apd:CitizenNameSurname>
                </PersonName>
        </Name>
```

The Name of one or more persons or an organisation must be supplied with PersonName or OrganisationName, the PersonName elements above use the standard govtalk address and Personal Details schema fragments (hence the prefix apd). This allows additional name

elements to be used, CitizenNameSurname being the only required element. Other elements are optional and all except Surname and RequestedName may be repeated.
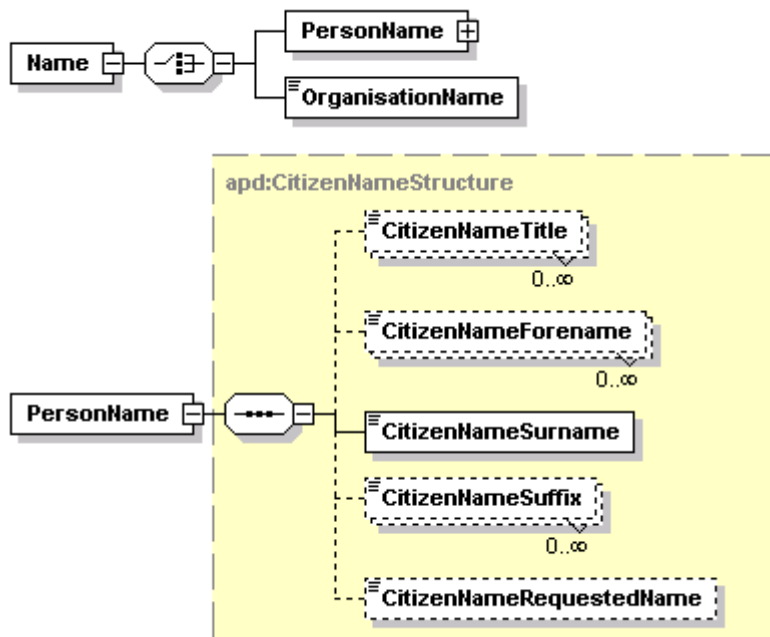

```xml
<CorrespondenceAddress private="yes">
        <OverseasAddress>
                <apd:IntAddressLine>33 Hurlbut
Street</apd:IntAddressLine>

        <apd:IntAddressLine>Cambridge</apd:IntAddressLine>
                <apd:Country>USA</apd:Country>
                <apd:InternationalPostCode>MA
02138</apd:InternationalPostCode>
        </OverseasAddress>
    </CorrespondenceAddress>
    <CorrespondenceAddress>
        <UKAddress>
                <apd:A_5LineAddress>
                        <apd:Line>3 The Pond</apd:Line>
                        <apd:Line>Coast Road</apd:Line>
                        <apd:Line>Berrow</apd:Line>
                        <apd:Line>Burnham on Sea</apd:Line>
                        <apd:Line>Somerset</apd:Line>
                        <apd:PostCode>TA8 1QZ</apd:PostCode>
                </apd:A_5LineAddress>
        </UKAddress>
    </CorrespondenceAddress>
```

CorrespondenceAddress may be a UKAddress or an OverseasAddress, and there may be more than one. CorrespondenceAddress has an attribute Private which defaults to "no", which may be used if an individual does not wish his/her address to be disclosed eg to a former spouse. OverseasAddress uses InternationalAddressStructure, which requires between two and five AddressLines, followed by at least one of the elements Country and InternationalPostCode in either order, depending on the conventions of the particular country. These elements are also from the standard govtalk Address and Personal Details schema.
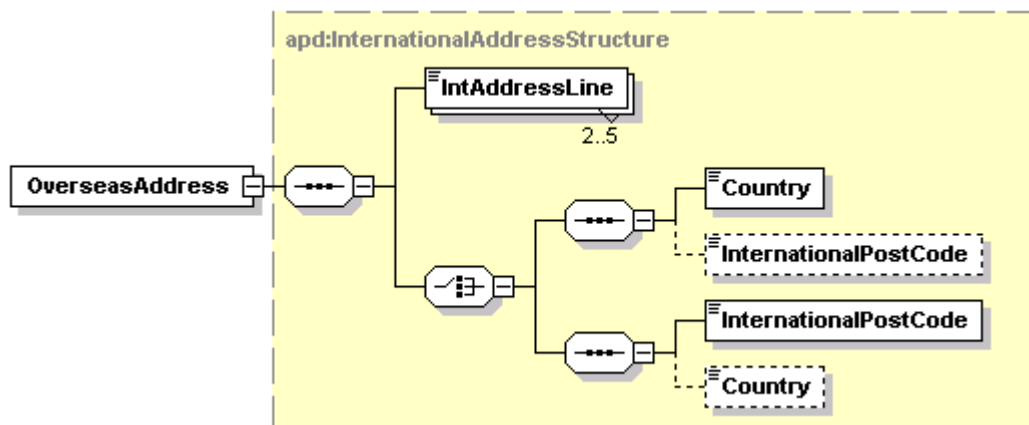
The UKAddress, of which an example is shown above, must conform to the Address and Personal Details schema rules for UK address, which may conform to BS7666 or a simpler 5 line address, or use both! UPRN may also be included. The 5LineAddress format must contain between two and five address lines of up to 35 characters, PostCode being optional but validated if present.
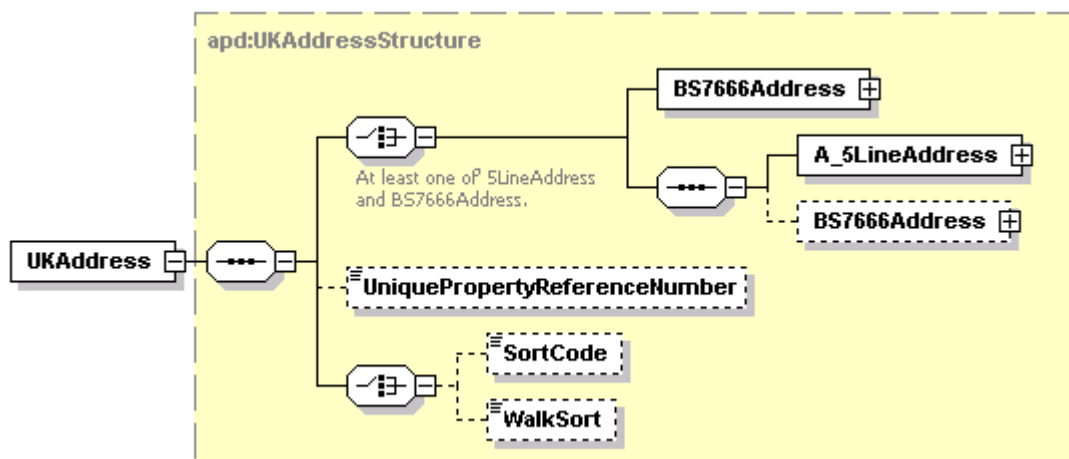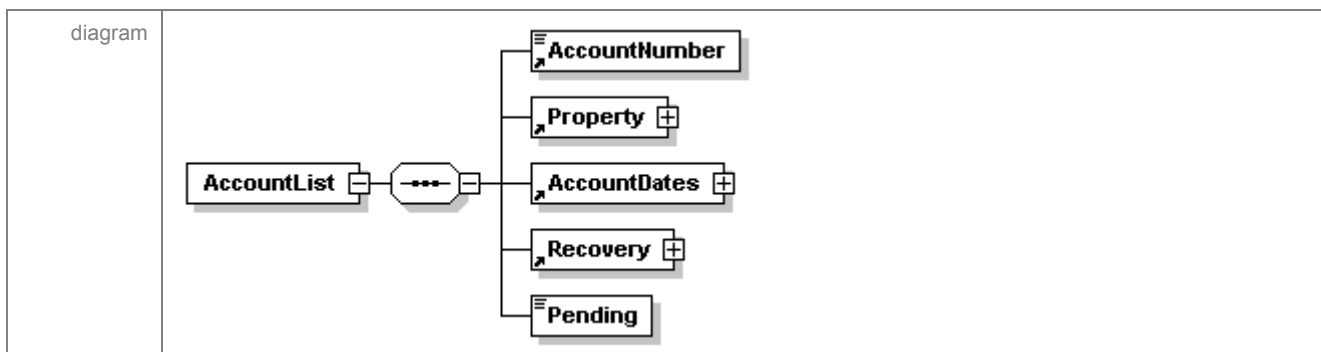

The BS766 format if used, must contain PAON and may contain SAON, both validated and at least 4 characters, if used. StreetDescription is required and may be up to 100 characters long. UniqueStreetREferenceNumber is optional and if used must be an integer between 1 and 99999999. Following street information is a choice of Locality (1-35 characters), Town (1-30 characters), and/ or AdministrativeArea (1-30 characters), followed optionally by any of PostTown (1-30 characters) , Postcode (validated against Postcode pattern), and UPRN.
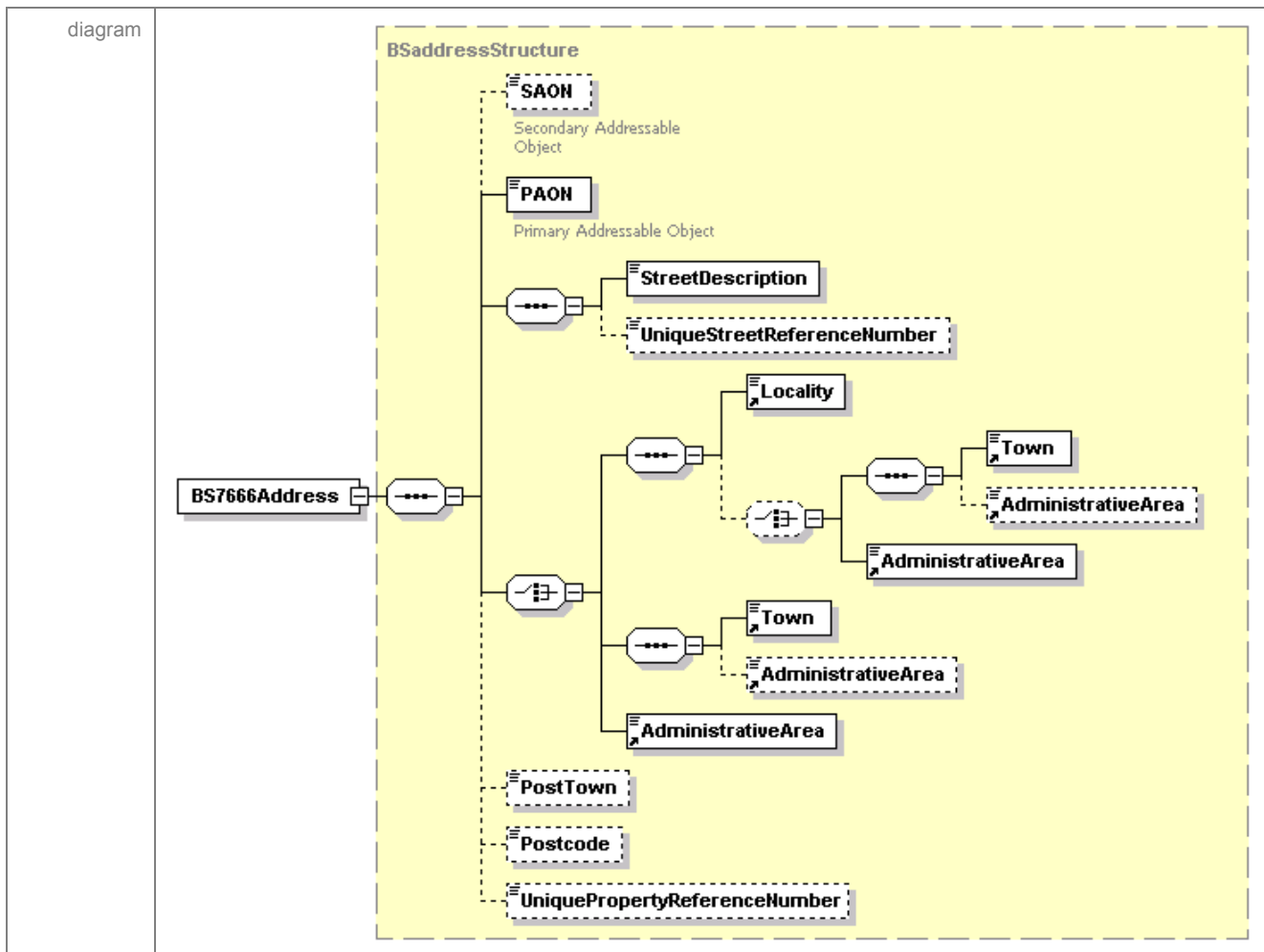
```
<AccountList>
        <AccountNumber>0501500030</AccountNumber>
```

AccountList may be repeated, once for each property, and contains the information about each property in turn. There are no restrictions on the content of AccountNumber except that it must be a string of at least two characters.

```
<Property>
        <PropertyAddress>
                <apd:A_5LineAddress>
                        <apd:Line>3 The Pond</apd:Line>
                        <apd:Line>Coast Road</apd:Line>
                        <apd:Line>Berrow</apd:Line>
                        <apd:Line>Burnham on Sea</apd:Line>
                        <apd:Line>Somerset</apd:Line>
                        <apd:PostCode>TA8
1QZ</apd:PostCode>
                </apd:A_5LineAddress>
        </PropertyAddress>
        <CurrentBand>B</CurrentBand>
        <Period>
                <StartDate>2000-01-01</StartDate>
        </Period>
</Property>
```

The Property element contains an optional Local Authority property reference and the address, which follows the UK address rules described above, CurrentBand, and Period during which the account has been held, which must contain a StartDate, and may also contain EndDate and NumberofDays if the account is now closed.
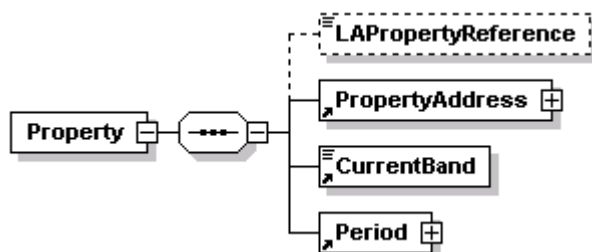

```
<AccountDates>
        <StartDate>1993-08-13</StartDate>
```

```
            <EndDate>2001-05-08</StartDate>

        </AccountDates>
```

AccountDates use the Period pattern, requiring a StartDate for the start of the account, and optional EndDate and NumberofDays if the account is closed.

```
        <Recovery>

            <RecoveryFlag>no</RecoveryFlag>

        </Recovery>
```

Recovery consists of a required RecoveryFlag with possible values yes or no, plus optional RecoveryText to describe the current status of the account.

diagram	

Pending is optional and used to indicate whether a decision has not yet been adjudicated. There may be several discounts under consideration at one time.

```
    <Pending>Awaiting Determination of Single Person
Discount</Pending>

    <Pending>Awaiting Determination of Housing
Benefit</Pending>

    <Pending>Awaiting Banding Update from the Valuation
Office</Pending>

    <Pending>Awaiting processing of your recent Change of
Address</Pending>
```

AccountView message

This sample instance of the View Council Tax AccountView message illustrates the corresponding features of the View Council Tax schema definition and how it may be used. This message can be used to view the current status and detail for a selected account, formatted according to the style and policies of each local Authority.

```
<AccountView xmlns="http://www.govtalk.gov.uk/LG/CTView"
xmlns:apd="http://www.govtalk.gov.uk/people/AddressAndPersonal
Details"  xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance"
xsi:schemaLocation="http://www.govtalk.gov.uk/LG/CTView
CTView-v0.2.xsd" SchemaId="CTView" SchemaVersion="0.2">
```

The root element in this case is AccountView, and contains the schema and namespace references and required attributes SchemaID and SchemaVersion.

```
<ExtractionDate>2002-02-14T09:30:47-05:00</ExtractionDate>
     <AccountNumber>0501500210</AccountNumber>
     <Name>
          <PersonName>

     <apd:CitizenNameTitle>Mr</apd:CitizenNameTitle>

     <apd:CitizenNameForename>William</apd:CitizenNameForename
>

     <apd:CitizenNameForename>James</apd:CitizenNameForename>

     <apd:CitizenNameSurname>Goldfish</apd:CitizenNameSurname>
          </PersonName>
     </Name>
     <Name>
          <PersonName>

     <apd:CitizenNameTitle>Ms</apd:CitizenNameTitle>

     <apd:CitizenNameForename>Sarah</apd:CitizenNameForename>

     <apd:CitizenNameForename>Jane</apd:CitizenNameForename>

     <apd:CitizenNameSurname>Haddock</apd:CitizenNameSurname>
          </PersonName>
     </Name>
```

The first part of this message uses the same components as the AccountsHeld message described above. However as this message deals with a single account, there may be more than one responsible person as shown in this example. If required, a stylesheet may combine two account-holders using the elements within name to produce an envelope first line as "Mr William Goldfish and Ms Sarah Haddock".

PropertyAddress is a UK address as described above, followed by CurrentBand and Recovery as in the AccountsList (per property) part of the AccountsHeld message.

```
<Property>
          <LAPropertyReference>242166</LAPropertyReference>
          <PropertyAddress>
               <apd:A_5LineAddress>
                    <apd:Line>5 Sludge Alley</apd:Line>
```
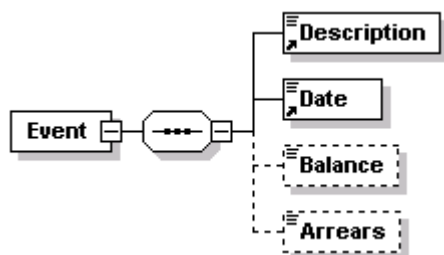
```
                <apd:Line>Beach Road</apd:Line>
                <apd:Line>Berrow</apd:Line>
                <apd:Line>Burnham on Sea</apd:Line>
                <apd:Line>Somerset</apd:Line>
                <apd:PostCode>BN7 2BE</apd:PostCode>
            </apd:A_5LineAddress>
        </PropertyAddress>
        <CurrentBand>B</CurrentBand>
        <Period>
            <StartDate>2000-01-01</StartDate>
        </Period>
    </Property>
    <Recovery>
        <RecoveryFlag>yes</RecoveryFlag>
        <RecoveryText>Summons Issued 25-01-
2002</RecoveryText>
    </Recovery>
    <Event>
            <Description>1st Reminder</Description>
            <Date>2001-05-22</Date>
            <Balance>416.06</Balance>
        </Event>
        <Event>
            <Description>Final Notice</Description>
            <Date>2001-08-14</Date>
            <Balance>416.06</Balance>
        </Event>
```

Event is optional, with one element per account year event. Each event has a required Description and date, with optional Balance and Arrears.

This is followed by details by account year, which gives a full picture of all aspects of the account during the year, showing transactions relating to that year even though not necessarily posted in that year. An account raised in May which started in March would create two separate years' worth of records. The overall strucure is:
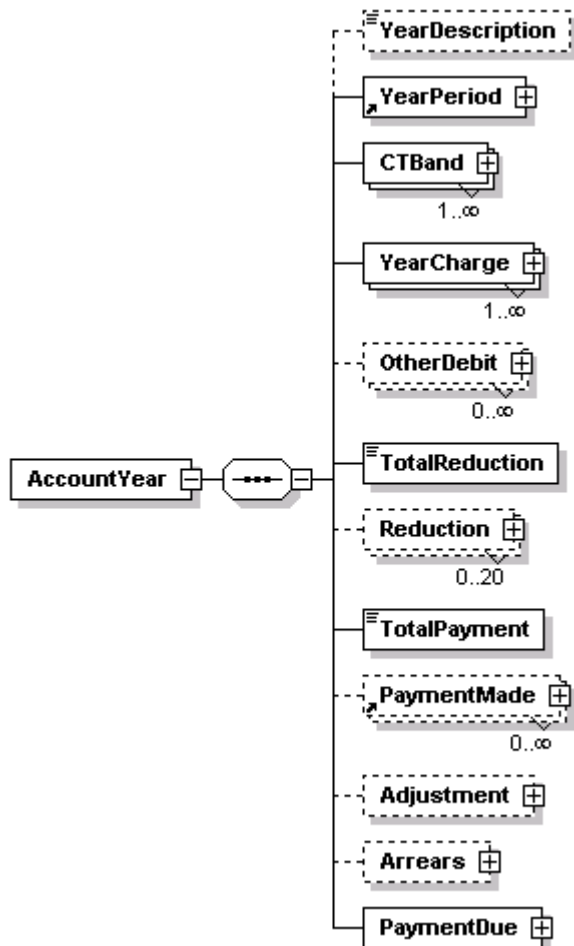
The YearDescription is optional. YearPeriod contain the dates of the Council Tax Year and NumberofDays, which in this context is for the full year.

```
    <AccountYear>
<YearDescription>2001/2002</YearDescription>
    <YearPeriod>
      <StartDate>2001-04-01</StartDate>
      <EndDate>2002-03-31</EndDate>
      <NumberofDays>365</NumberofDays>
    </YearPeriod>




        <CTBand>
            <Period>
```
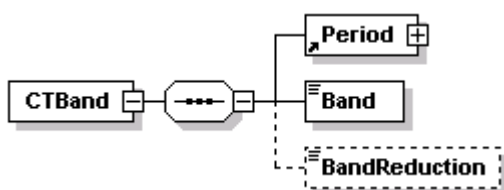
```
                        <StartDate>2000-04-06</StartDate>
                </Period>
                <Band>B</Band>
            </CTBand>
```

CTBand is required and there may be one or more bands for the property during the AccountYear. As usual, the Period requires StartDate and optional EndDate and NumberofDays.



Band must have a value of A-H. There is also an optional BandReduction element, for use in the case of a reduction for disability for example.

```
            <YearCharge>
                <Description>For a Band B property in the
Parish of Ashcott</Description>
                <TotalCharge>975.29</TotalCharge>
                <Period>
                        <StartDate>2001-09-05</StartDate>
                        <EndDate>2002-03-31</EndDate>
                        <NumberofDays>207</NumberofDays>
                </Period>
```

There must be one or more YearCharge, which contains a text Description, TotalCharge, and Period within the year during which the account was active, followed by ChargeComponents of one or more precepting bodies.
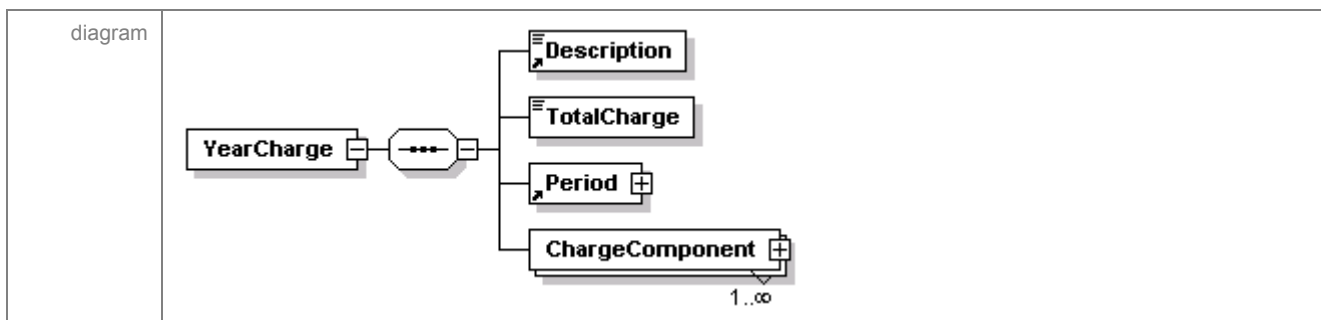
```
            <ChargeComponent>
                    <Description>Ashcott Parish Annual
Charge</Description>
                    <AnnualAmount>587.42</AnnualAmount>
                    <PercentageChange>4.00</PercentageChange>
            </ChargeComponent>
            <ChargeComponent>
                    <Description>Sedgemoor District Council
Annual Charge</Description>
                    <AnnualAmount>62.27</AnnualAmount>
                    <PercentageChange>5.00</PercentageChange>
            </ChargeComponent>
            <ChargeComponent>
                    <Description>Somerset County Council
Annual Charge</Description>
                    <AnnualAmount>325.60</AnnualAmount>
                    <PercentageChange>5.00</PercentageChange>
            </ChargeComponent>
            <CalculatedAmount>552.98</CalculatedAmount>
```

Each ChargeComponent has its own Description, which is used in the example above to show the full year's charge from each of the precepting bodies. Within each ChargeComponent, AnnualAmount is the total annual charge by the precepting body and an optional PercentageChange from the previous year for this ChargeComponent.
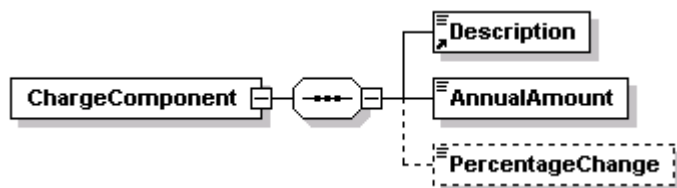
The total is pro-rated based on the NumberofDays in the year for which the account was open (in this case 207 out of 365 days) to give the CalculatedAmount for the account.

```
<OtherDebit>
        <Date>2001-06-30</Date>
        <OtherDebitDesc>Fine</OtherDebitDesc>
        <Amount>120.00</Amount>
</OtherDebit>
```

For each additional debit category, if any, there will be an OtherDebit element, with required Date, OtherDebitDesc, and Amount.
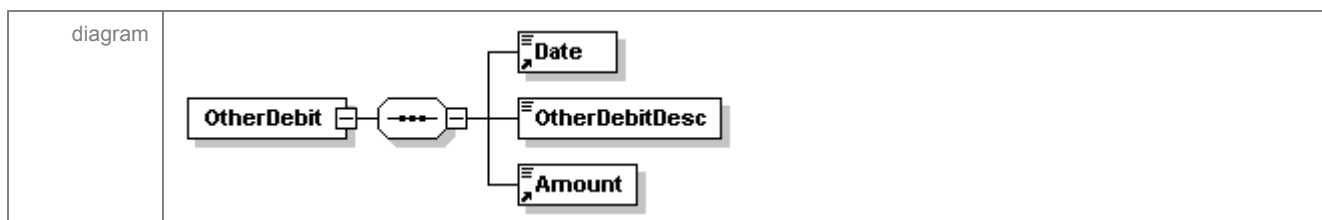

```
        <TotalReduction>136.69</TotalReduction>
            <Reduction>
                    <Description>Single Person Discount
25%</Description>
                    <Period>
                        <StartDate>2001-09-05</StartDate>
                        <EndDate>2002-03-31</EndDate>
                        <NumberofDays>207</NumberofDays>
                    </Period>
                    <CalculatedAmount>-51.05</CalculatedAmount>
            </Reduction>
            <Reduction>
                    <Description>Council Tax Benefit</Description>
                    <Period>
                        <StartDate>2000-05-01</StartDate>
                    </Period>
                    <CalculatedAmount>-85.64</CalculatedAmount>
            </Reduction>
```

Reduction elements are used for various types of transaction including Discounts, Housing Benefit, Disability, and Exemption. TotalReduction is required, Reduction is optional, and for each Discount or Reduction in effect within the YearPeriod there should be one Reduction

element. There may be more than one period of the same reduction, and there may be several Reductions in effect at the same time. Reduction has a structure of optional Description and Period, and CalculatedAmount based on the number of days in force.
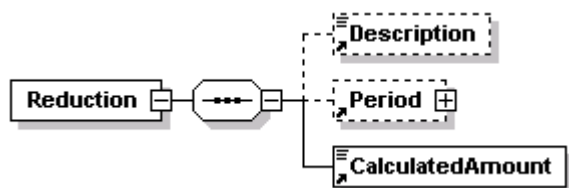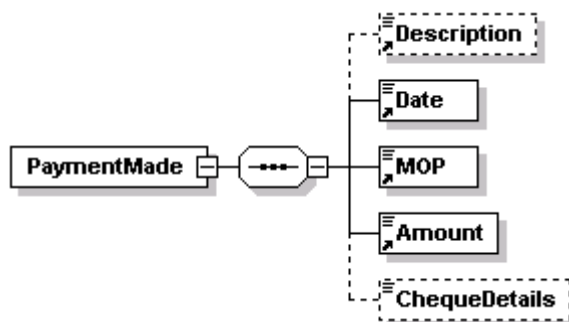

TotalPayment to date is required, followed by a PaymentMade element for each payment to date, if any.

```
<TotalPayment>340.85</TotalPayment>
<PaymentMade>
      <Date>2000-04-06</Date>
      <MOP>Direct Debit</MOP>
      <Amount>20.85</Amount>
</PaymentMade>
<PaymentMade>
      <Description>Transfers between
Accounts</Description>
      <Date>2000-04-06</Date>
      <MOP>Transfer</MOP>
      <Amount>320.00</Amount>
</PaymentMade>
```
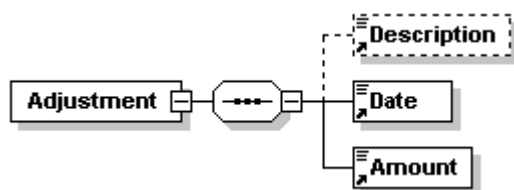
PaymentMade contains an optional description, followed by required Date, MOP (Method of Payment), Amount and optional ChequeDetails.

Adjustment is optional, and may be used for any adjustments to the account such as transfers and write-offs, and contains an optional Description, followed by required Date, and Amount of the adjustment applied.

Arrears is optional, for amounts from previous years, and for each Arrears period there should be one Arrears element. Arrears has a structure of optional Description and required Period and Amount.
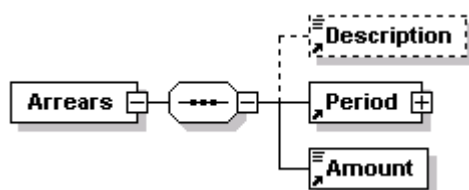

```xml
<PaymentDue>
        <TotalDue>416.06</TotalDue>
        <MOP>Direct Debit</MOP>
        <Reference>2435 Harvey</Reference>
        <FuturePayment>
                <Date>2002-04-10</Date>
                <Amount>39.21</Amount>
        </FuturePayment>
        <FuturePayment>
                <Date>2002-05-10</Date>
                <Amount>40.00</Amount>
        </FuturePayment>
        <FuturePayment>
                <Date>2002-06-10</Date>
                <Amount>40.00</Amount>
        </FuturePayment>
        <FuturePayment>
                <Date>2002-07-10</Date>
                <Amount>40.00</Amount>
        </FuturePayment>
        <PaymentDiscount>
                <Date>2002-04-10</Date>
                <Amount>154.43</Amount>
                <Percentage>3.00</Percentage>
        </PaymentDiscount>
```

```
                    </PaymentDue>
```

PaymentDue is required, and contains information about total due within the account year, showing the instalments, divided into OverduePayments and FuturePayments. The TotalDue element is thus the sum of any overdue payments and unexpired instalments to the end of the AccountYear. The MOP (method of payment) is the nominated means for payment, with an optional Reference such as a Direct Debit mandate number, although individual payments may be made by other methods
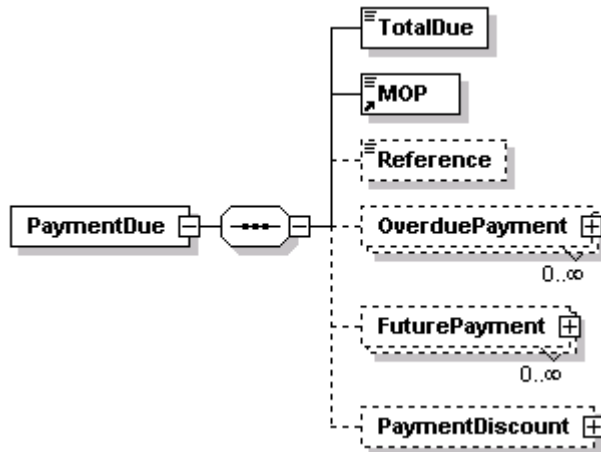
OverduePayment and FuturePayment elements are both optional, and each contains a Due Date and Amount.
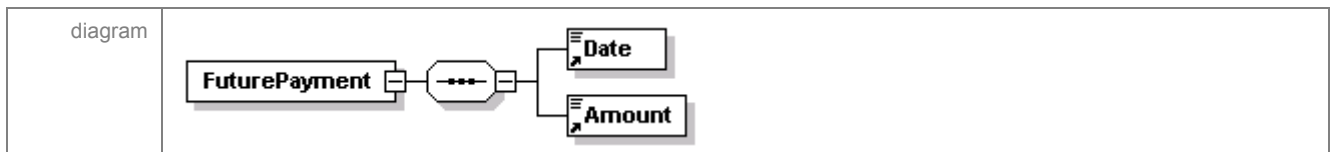

```
<PaymentDiscount>

                <Date>2002-04-10</Date>

                <Amount>154.43</Amount>

                <Percentage>3.00</Percentage>

          </PaymentDiscount>
```

Following the instalments is an optional PaymentDiscount, where a single payment before the first instalment date offers an alternative reduced total amount. This element requires Date, Amount (total reduced amount) and Percentage reduction.

```
        </AccountYear>
</AccountView>
```