

# CAPITA

## Arrangements Manager

### Simplifying special payment arrangements

Capita's Arrangements Manager solution is designed to simplify the process of making special arrangements for taxpayers while conforming to your local recovery policy.

Capita's research has found that over the last 5 years the number of special payment arrangements entered into by taxpayers has increased significantly. However, the percentage of payment arrangements that never complete, are cancelled or simply default on payment averages 70 per cent. This indicates that many arrangements entered into are doomed to fail and that stricter management of arrangements is required.

The screenshot shows the 'Arrangements Manager Parameters' window for 'Mon 09.01.2012'. It includes a menu bar with 'File' and 'Help'. The main area contains several configuration options:

- Prevent creation of new arrangements if  defaulted arrangements in last  months
- Pass for "Approval" if first instalment date  months or later than creation date
- Hold recovery until arrangement reviewed  with PA  Circ Code
- Display Minimum Plan before Alternate Plan  Yes
- Enable "Reverse" button to switch instalment amounts  Yes
- Minimum Arrangement Amount  Maximum Arrangement Amount

Below these options are tabs for 'Cancellations', 'Rejections', 'Monthly', 'Weekly', 'Fgtrnightly', 'Lunar Mthly', 'Quarterly', and 'Variable'. The 'Monthly' tab is selected, and 'Allow frequency for New Arrangements' is checked.

Arrg Amt From	Arrg Amt Up To	Minimum Instal. Amt	No. of Rems	Days To Pay	Curr Year Only Last Payt Date	Max Instals If Arrs incl
10.00	500.00	5.00	0	10	31.03.2012	10
500.00	1000.00	10.00	2	10	31.03.2012	12
1000.00	8000.00	20.00	0	10	31.03.2012	15
8000.00	20000.00	30.00	0	14	31.03.2012	20

At the bottom are buttons for 'Save', 'New', 'Amend', and 'Quit'.

Figure 1: Configuration options

### Benefits of Arrangements Manager:

- Configuration ensures arrangement values and frequencies comply with your local rules for collection and recovery
- Configuration ensures standard arrangements are created in accordance with your rules
- Non-standard arrangements create automatic entries in My Tasks for confirmation or rejection by an approver
- Reduced time taken to create arrangements
- Reduced numbers of repeat arrangements that are likely to fail
- Reduced administration cost of dealing with failed arrangements
- Automatic creation of rejection letters using a standard template
- Savings in printing and postage costs on failed arrangements.

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## Arrangements Manager configuration enables you to:

- Limit the number of repeat arrangements - by defining rules to prevent creation of new arrangements if more than a specified number have defaulted in a defined period
- Define configuration rules allowing arrangements to automatically meet your requirements - avoiding inconsistency and reducing time spent calculating instalments. Entries in My Tasks are also created for approval where an arrangement falls outside the scope of the rules
- Set upper and lower limits for arrangements - ensuring arrangements are not entered for small amounts or very large amounts that would require different recovery methods
- Define cancellation and rejection reasons by creating a pick list of reasons for your recovery staff to use for cancellation or rejection to ensure consistency and efficiency.

CT1305 - Arrangements - Details - 10001611 - Wed 30.11.2011

Bl	From	To	Balance	Status	Incl	Costs	Priority
6	01.04.1998	01.04.1999	221.00	LIAB	✓ Yes	No	1
7	01.04.1999	01.04.2000	583.41	LIAB	✓ Yes	No	2
8	01.04.2000	01.04.2001	267.00	LIAB	✓ Yes	No	4
9	01.04.2001	01.04.2002	266.00	LIAB	✓ Yes	No	5
15	01.04.2007	01.04.2008	350.00	LIAB	✓ Yes	No	3
18	01.04.2010	01.04.2011	40.00	LIAB	✓ Yes	No	6
19	01.04.2011	14.05.2011	132.21		No	No	0
21	16.06.2011	01.04.2012	872.26		No	No	0

Total Balance Incl. 1727.41

Payment Type: Direct Debit  
Payment Frequency: Monthly  
Align Start Date with Account Payment?  Yes

MINIMUM ARRANGEMENT PLAN (STANDARD)  
1 Instal of 93.41 followed by 19 Instal of 86.00

ALTERNATE ARRANGEMENT PLAN  No  
No. Instals: 0 OR Instal Amount: 0.00  
OR First Instal: 0.00 Subseq Instals: 0.00

REMICERS & DEFAULT NOTICES  
 Live Only

Figure 2: Standard arrangement calculation

CT1305 - Arrangements - Details - 10001611 - Wed 30.11.2011

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21	16.06.2011	01.04.2012	872.26		No	No	0

Total Balance Incl. 1727.41 **ARRANGEMENT APPROVAL REQUIRED**

Payment Type: Direct Debit  
Payment Frequency: Monthly  
Align Start Date with Account Payment?  Yes  
Required End Date: 15.07.2013

MINIMUM ARRANGEMENT PLAN (STANDARD)  
1 Instal of 93.41 followed by 19 Instal of 86.00

ALTERNATE ARRANGEMENT PLAN  Yes  
No. Instals: 30 OR Instal Amount: 0.00  
OR First Instal: 0.00 Subseq Instals: 0.00

REMICERS & DEFAULT NOTICES  
 Live Only

Figure 3: Non-standard arrangement requiring approval

## The full suite of management reports provides the ability to:

- Monitor numbers and success rates of arrangements with graphical displays and the option to drill-through to additional detail in My Reports
- Compare performance across staff
- Identify the success of arrangements by payment method
- Report on arrangements referred for approval.

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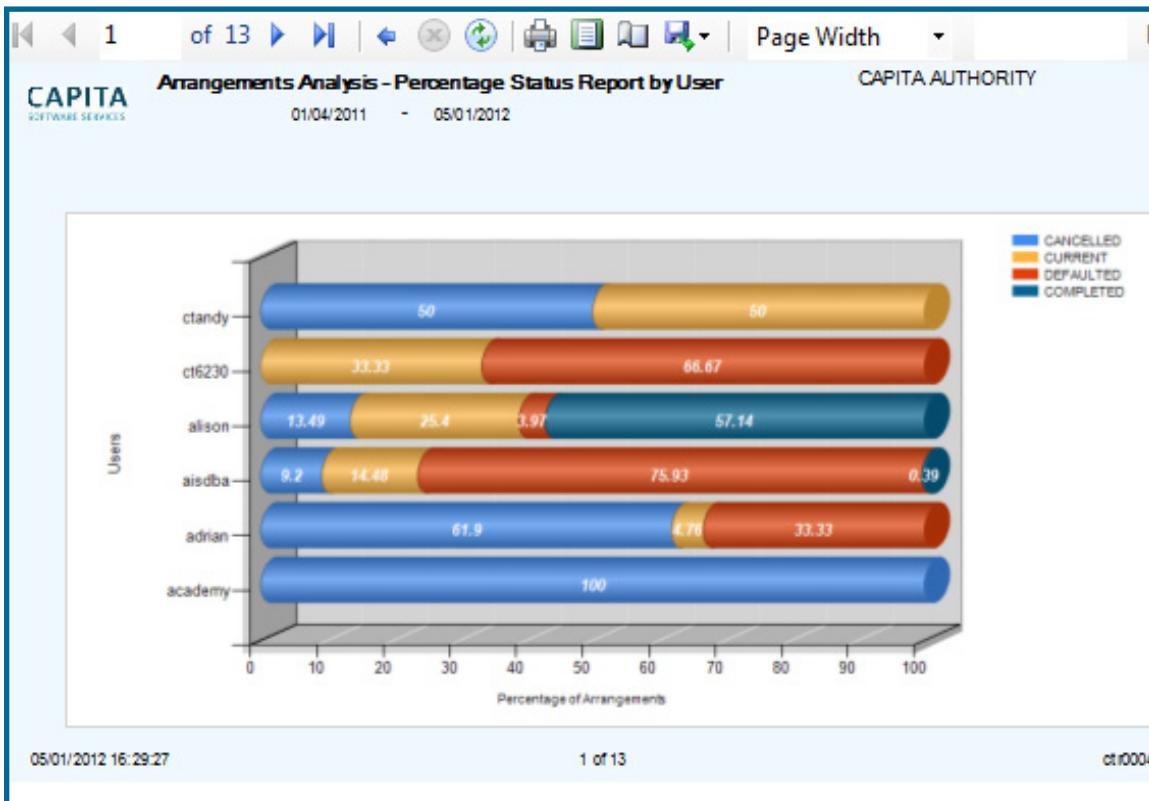


Figure 4: Example report