



# CGI Collections for Government powered by Salesforce

September 2020

# CGI Collections for Government: Key Features

## Complex debtor relationships and types

Designed to meet the unique standards and regulations around government collections



## Legal actions

Robust functionality is devoted to the generation and processing of involuntary legal actions



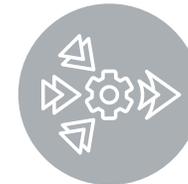
## Powerful, persuasive correspondence

Easy-to-use templates apply management-defined rules to automatically merge debtor content with standard text



## Collection agency integration

The entire collection agency lifecycle is managed; eligibility for assignment, monitoring, and recall management



## Debtor self-service

Debtors can check their balances and set up payment agreements from any desktop or mobile device, at any time

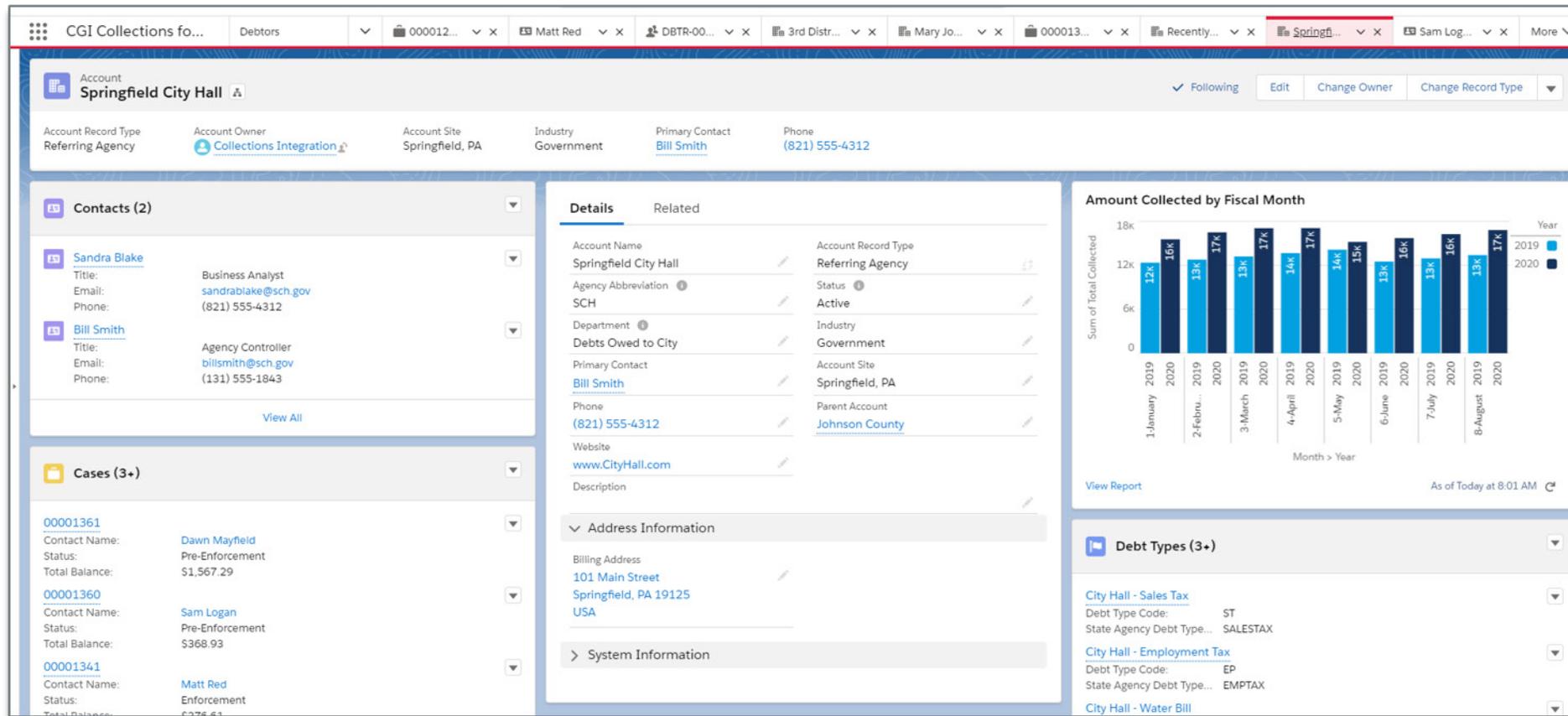


## Payment agreements

A payment plan calculator can determine installments and ensure arrangements comply with policies



# Collections for Government enables centralized collections



Many government entities are collecting debt for the same debtor in different departments of the government. There may be court debt owed to the county courts, utility bills owed to the county water department, and parking tickets owed to the sheriff's department.

**With the Collections for Government solution, each agency or department has an account in the system with related debt types that may be referred for collections action.** Debt types are configurable, and can have different rules around the imposition of interest or other types of fees or penalties.

# Provides debt and debtor information in a single case view

The screenshot displays the 'Root Case' view for case 00001014. The interface includes a top navigation bar with 'CGI Collections' and 'Cases' tabs. The main content area is divided into several sections:

- Debtor Information:** Shows Debtor Tax ID (470-44-7358), Birth Date (7/17/1975), Primary Address (114 Milwaukee Plaza, Apt #2, Pittsburgh, PA 15205 USA), Primary Phone (17246155426), and Primary Email (nwhoston1@bing.com).
- Case Information:** Displays Case Number (00001014), Case Record Type (Root), Parent Case, Status (Pre-Enforcement), Last Status Changed (8/19/2020, 8:10 AM), Date/Time Opened (8/19/2020, 8:10 AM), and Date/Time Closed.
- Financial Information:** Lists Total Balance (\$1,274.64), Total Referred Amount (\$2,350.00), Total Principal (\$1,234.43), Total Interest (\$22.12), Total Penalty (\$14.23), Total Fee (\$3.86), Total Enforceable Balance (\$0.00), Debt Payment Totals (\$0.00), Last Payment Amount (\$0.00), Last Payment Date, Total Number of Payments (0), and Number of Insufficient Fund Transactions (0).
- Root Case Summary:** Shows Total Referred Amount (\$2,350.00), Total Enforceable Balance (\$0.00), Total Balance (\$1,274.64), Last Debt Received (8/19/2020, 8:10 AM), Last Status Changed (8/19/2020, 8:10 AM), Active Debt Count (1), Enforceable Debt Count (0), Total Number of Payments (0), Number of Insufficient Fund Transactions (0), Number of Installments (0), Number Of Debts (1), and Number of Broken Plans (0).
- Case Note:** Includes fields for Type (Inbound Call), Party (Debtor), Debtor (Nicholas Whoston), and Note.
- Debts (1):** Lists one debt with Debt Number DBT-00000, Debt Type Parking Authority - Parking Fine, Status Not Enforceable, Balance \$1,274.64, Referring Agency AGENCY-48328, Agency Debt ID DEBT-24081, and Incurred Date 8/1/2019.
- Related Cases (2):** Lists two related cases: Case 00001019 (Due Diligence, Auto-Created Due Diligence Case Referred Case - 1, On Hold, Total Balance \$1,274.64, Last Status Changed 8/19/2020, 12:43 PM) and Case 00001024 (Payment Plan, Payment Plan, Active, Total Balance \$1,274.64, Last Status Changed 8/19/2020, 12:43 PM).
- Correspondences (1):** Lists one correspondence with Correspondence Name COR-00000, Recipient Nicholas Whoston, Template Text Notice 1, Created Date 8/19/2020, 12:40 PM, and Created By User User.
- Timeline:** Shows a sequence of activities: Update Due Diligence - Nicholas Whoston (8/19/2020, 12:43 PM), New Payment Plan - Nicholas Whoston (8/19/2020, 12:43 PM), Update Due Diligence - Nicholas Whoston (8/19/2020, 12:40 PM), New Due Diligence - Nicholas Whoston (8/19/2020, 12:32 PM), New Root - Nicholas Whoston (8/19/2020, 08:10 AM), New Debt (8/19/2020, 08:10 AM), and New Debtor - Nicholas Whoston (8/19/2020, 08:10 AM).

**Collections for Government is designed to enable collection agents to work as efficiently as possible in a high volume environment.**

An agent user of Collections for Government can:

- View a consolidated, holistic view of a case
- Easily determine the current state of a case
- View summary information related to the case balance
- See demographics of debtor or debtors associated with the case
- View individual debts associated to the case
- View a detailed timeline that summarizes all case activity

Quick action links at the top of the case enable the agent to easily take the most common case actions, such as setting up a payment plan, without having to navigate to other pages.

# Consolidated debtor view provides quick access to information

The screenshot displays the 'Consolidated debtor view' for debtor DBTR-00001. The interface is organized into several sections:

- Details:** A sidebar on the left containing sections for Debtor Identification, Debtor Totals, Debtor Name, Primary Contact Information, Address, Phone, Email, and System Information.
- Debtor Photo Feed:** A central section showing debtor details: Debtor Tax ID (21-8008152), Incorporation Date (8/1/2011), Contact (John Williams), Primary Email (service@photofeed.com), and Total Balance (\$3,755.19).
- Correspondences (4):** A table listing recent communications.
- Debts (1):** A table listing the debtor's current debts.
- Cases (2):** A section for legal cases.
- Bank Assets (1):** A section showing the debtor's bank assets, including a Bank of America Business Checking account.
- Affiliates (1):** A section showing the debtor's affiliates, including an attorney.
- Employers (0):** A section for the debtor's employers.

Recipiant	Template Text	Created Date	Delivery Method	
1	Photo Feed	Legal Action Notification	8/21/2020, 10:23 AM	Mail Batch
2	Photo Feed	Pending Legal Action Notification	8/21/2020, 10:23 AM	Mail Batch
3	Photo Feed	60 Day Notice	8/20/2020, 12:21 PM	Mail Batch
4	Photo Feed	30 Day Notice	8/19/2020, 1:41 PM	Mail Batch

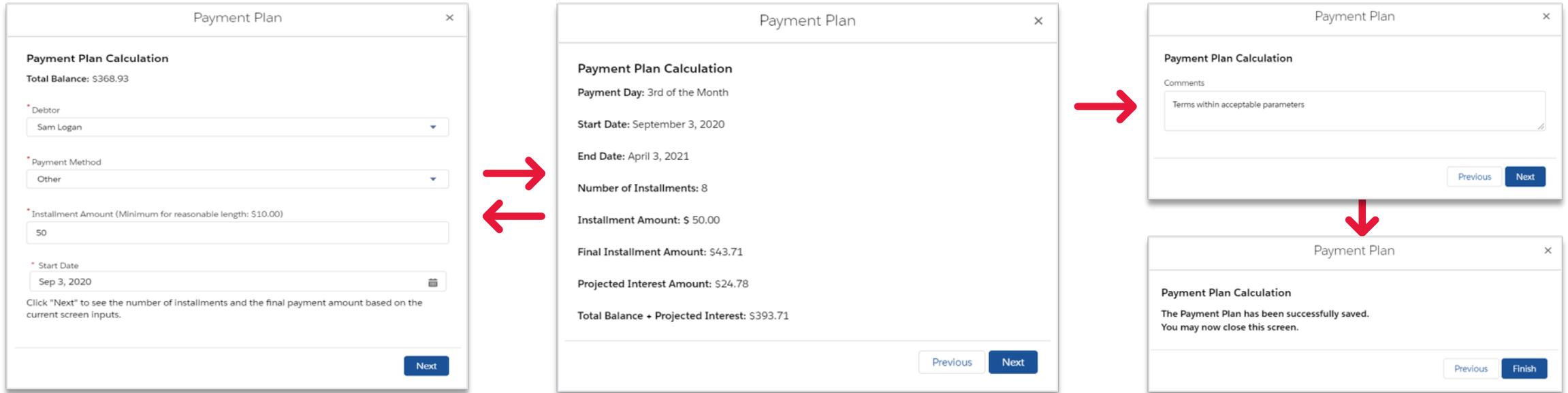
Debt Number	Debt Type	Status	Balance	Created Date	
1	DBT-00003	County Recorder - Title Fee	Enforceable	\$3,755.19	8/17/2020, 2:58 PM

**Collections for Government provides a holistic view of debtor information.**

Agents can easily access debtor demographic information, outbound communications, debts, bank assets, employers and affiliates on one page.

This debtor view supports collection agents when integrated to an auto dialer. While an agent is communicating with a debtor on an inbound call, debtor information is clearly presented allowing the agent to quickly verify the debtor's identity and details.

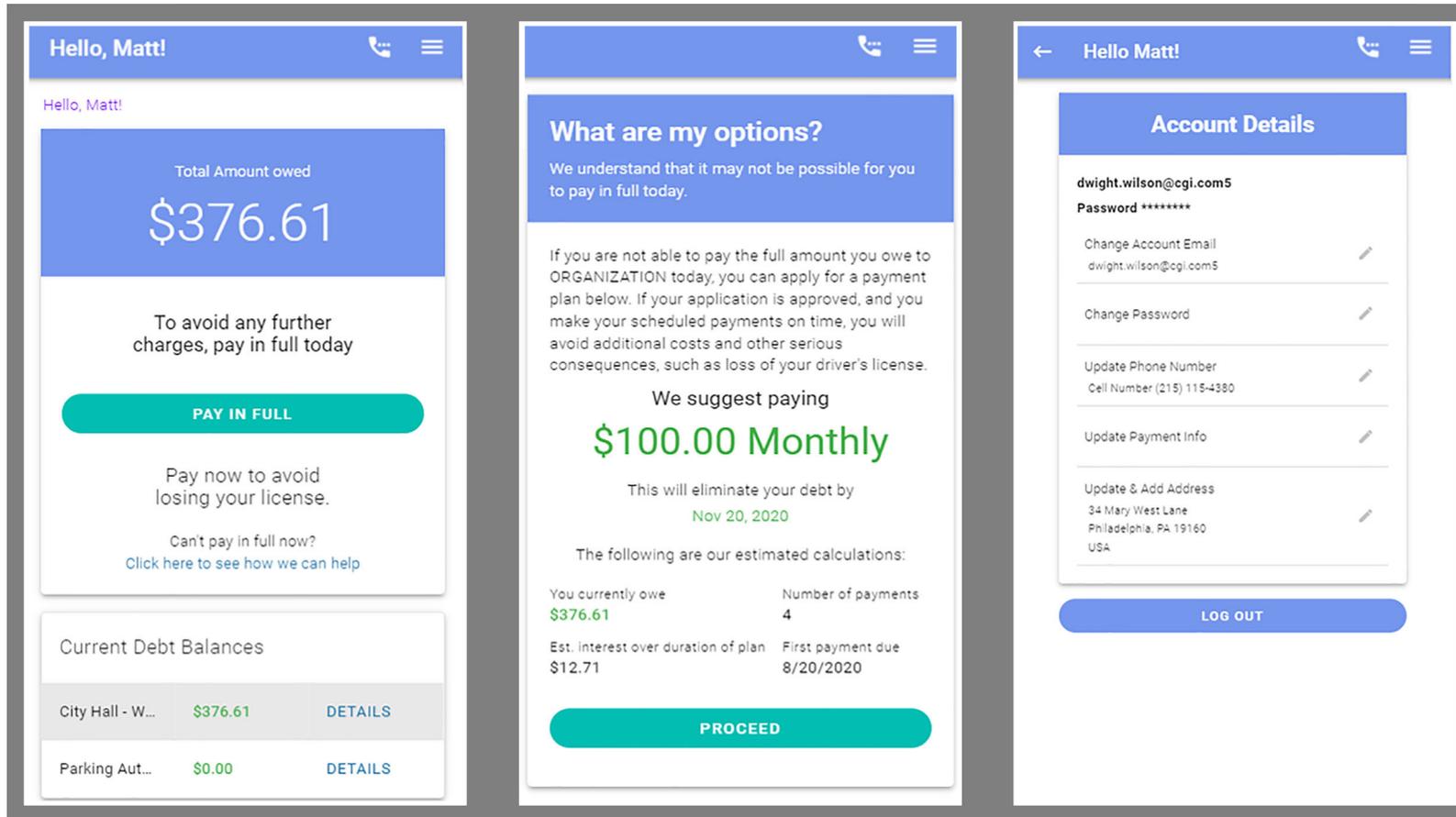
# Customize business process flows with a configuration wizard



**Collections for Government offers a wizard-based approach to guide the user through complex business processes.** The wizard can be configured to enforce agency rules or guidelines around the business process so that users are not violating agency policy.

For example, when a collection agent chooses to create a payment plan, a pop up wizard guides the agent through the process. The tool automatically monitors the plan to ensure payments are being made according to the established schedule. If payments are late, the monitoring process can trigger events such as placing the case on a list for review, or sending a reminder letter to the debtor that they are late on an installment payment.

# Supporting citizens with a simple, clear user interface

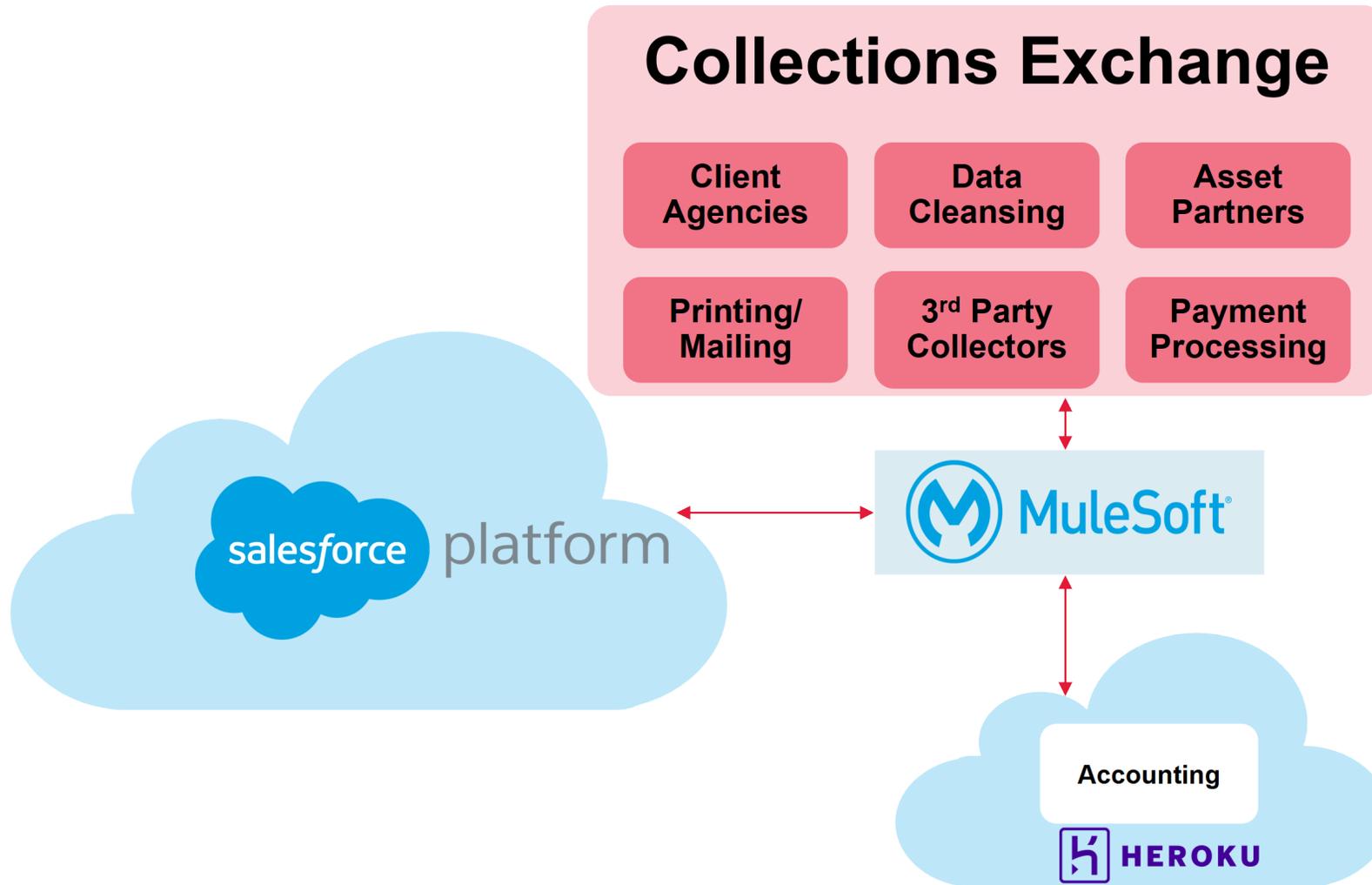


**Collections for Government offers streamlined processes directly for the debtor via the citizen portal.**

The solution puts the focus on the citizen, with a modernized and secure interface that maximizes the user experience and simplifies the payment process.

The interface provides multiple payment options, such as credit card or EFT. Debtors can also check their balances and account history, update personal information, or make one time payments from any desktop or mobile device, at any time, increasing the likelihood of successful resolution.

# Easily integrate third party data and processes



A government collections solution requires multiple integration points. These can include accounting systems, data partners, government agencies, third party collection agencies, skip tracing vendors and financial institutions, to start.

**Collections for Government utilizes the MuleSoft integration platform to provide the API and ETL support required to run a modern collections solution.**

While integration points can vary from customer to customer, Collections for Government provides integration accelerators out of the box for accounting integration and external interface exchanges.

## About CGI

Founded in 1976, CGI is among the largest independent IT and business consulting services firms in the world. With approximately 77,500 consultants and other professionals across the globe, CGI delivers an end-to-end portfolio of capabilities, from strategic IT and business consulting to systems integration, managed IT and business process services and intellectual property solutions. CGI works with clients through a local relationship model complemented by a global delivery network that helps clients digitally transform their organizations and accelerate results. With Fiscal 2019 reported revenue of C\$12.1 billion, CGI shares are listed on the TSX (GIB.A) and the NYSE (GIB).

Learn more at [cgi.com](https://www.cgi.com).

