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Call - Overview

Making a Call

This procedure will explain the process of making a call which will be dealt with by all caseworkers and team leaders within the Child Maintenance Group (CMG).

The outbound dialling used by staff within the CMG is called proactive dialling. Caseworkers or team leaders determine a call needs to be made, look up the case and contact details on the system and dial the contact. This type of outbound dialling applies whether calls are made to employers or clients. The amount of calls attempted where initial contact is unsuccessful is at the caseworkers discretion or until a decision is made that to continue call attempts will delay progression of the case.

When discussing QCs and ROCs with clients only the child's first name must be used.

The system checks if the client has suppressed notifications for the telephony contact category and if this is the case, case workers are not be able to dial the client's number.

When the contact has failed the security check and the caseworker believes the contact is not the Client/Client Representative, the caseworker must terminate the call and complete the bogus caller form and send this to the Security Advice and Support Centre.

For more information on discussing a case with a client refer to the 2012 Call Handling Guide.

Answering a Call

This procedure guides you through answering an incoming call and is dealt with by all caseworkers within the Child Maintenance Group (CMG) in client facing roles.

Callers should get the desired service from menu selections. They are subject to Interactive Voice Response (IVR), and asked to select an option appropriate to the reason for their call: 'Enquire on an existing case'; 'Correspondence received requesting parent to contact CMG'; 'Make a new application'.

If enquiring on an existing case, callers must provide their identification information (SCIN) before being put through to a caseworker. The call is automatically routed to the General Inbound Call Handling Team if the automated system is not able to identify the caller. This will result in the call not being attached to the contact. When this happens, go to the **Contacts Summary** tab, then in the **Activities** applet select the **Attach Inbound Call** button.

A receiving parent may have multiple cases held by different areas e.g. maintenance and enforcement. When the receiving parent calls, they are asked to enter their scheme client identification number (SCIN) into the IVR, the system recognises if this relates to multiple cases. The receiving parent is then asked to enter a date of the birth for the QC on the case they wish to discuss and the call then routes to the owning caseworker, team or segment where that case sits.

When discussing QCs and ROCs with clients only the child's first name must be used.

Caseworkers are only able to access detailed information related to the case they are managing, so may need to make call transfers to other areas when detailed information about different cases is required.

When the caller has failed the security check and the caseworker believes the caller is not the client/client representative, the caseworker must terminate the call and complete the bogus caller form and send this to the Security Advice and Support Centre.

Where the reason for the call has been identified, the correct service request should be created and then the relevant procedure followed. For more information refer to the fundamental on Notes.

Transferring a Call

This procedure will explain the process of transferring an incoming call which will be dealt with by all caseworkers within the Child Maintenance Group.

Having established the identity of the caller and checked their security details, caseworkers find out the reason for the call. If their query can't be resolved, the call will be transferred to an appropriate caseworker/area that is able to help the client.

There may be times when a call is received from a receiving parent who has multiple cases in different areas e.g. enforcement and maintenance. You will only be able to access detailed information related to the case you are managing. If the receiving parent requires detailed information about the other case held in a different area, you will need to perform a warm transfer to the other case owning caseworker unless the information requested is available to you within the contact summary.

If a client calls wishing to speak about their CSA case, perform a warm transfer to the CSA national helpline (NHL) who will then identify the owning caseworker and transfer the call accordingly.

For further guidance please refer to Policy, Law and Decision Making Guidance.

When speaking to clients always use the new terminology. For more information refer to Terminology Changes.

Making A Call

Select or generate outbound call activity

1. If there is an outstanding service request (SR) for the case the call relates to, select the outbound call activity within the SR. If there is not an outstanding SR generate an outbound call activity against the specific contact you wish to call. Check the **Activities Tab** to see if the client has specified what time of day is most convenient for you to call them.

2. If a client representative is set up on the case, check that they are the point of contact when making a call. If this is not the case set the client representative up as the point of contact using the SR you are working from:

    - Enter the SR

    - Go to **Activities** and add the **Contact** column

    - Select the MVG button and activate the representative

    ⚠️ The client representative's information isn't displaying as the point of contact, instead the first relative on the case is. To obtain the client representatives information, navigate to **Cases** and then **Service Request** (SR) and select the **Manage Client Representative** SR.

3. Select the **Call Retention Type** from the drop-down list provided to save the outbound call activity:

    - **CM Case Related** - used for calls where a case is discussed

    - **CM Non-Case Related** - used for general enquiries

    - **Employer** - used for employer calls

    - **CM Multiple Case Related** - used when more than one case discussed

    - **Options Prospect Related** - used when Options has transferred the call and the call will lead to a case

    - **Options Non-Prospect Related** - used when Options has transferred the call but no child maintenance (CM) service required

    - **Non-Commission Related Call** - used when caller does not wish to speak to CM e.g. asks to talk about benefits or Child Benefit

Check for disability or interpretation requirements

4. Review the contact details for the client you wish to call, check the language preference and disability requirements within the contact details, by selecting **More Info**.

5. If the client is hearing or speech impaired they will benefit more from the Child Maintenance Service Face to Face services. For more information refer to Face to Face - Arrange. If they prefer telephone contact there is a BT Soft Textphone service available. For more information refer to Call - Hearing And Speech Impaired.

6. There may be a language preference within the contact details, for which you would need to arrange Interpretation Services with the Big Word before making the call. For more information refer to Interpretation.

    ℹ️ When interpretation services are used, the outbound call will not be automatically associated to the client's record.

    - In these situations you have to create an outbound call activity and call the Interpretation Services. Once connected to the interpretation services ask them to call the client and arrange a three way call between you.

    - Go to the client's contact summary screen any time during or immediately after the call.

    - Go to the **Activities** applet and select **New**.

    - Select **Call Outbound** from the **Type** dropdown

    - Select an appropriate **Call Retention Type** from the dropdown menu (as listed above in **step 2**).

    - By selecting anywhere outside of the record, the system will automatically associate the call to the client's record.

Select The Number To Dial

If the call is to a third party and their number isn't showing on the system, refresh the data by coming out and going back into the activity, the telephone number should now be visible.

7. Select the appropriate number from the contact details by placing your cursor into the box with the number you wish to dial. If you do not select a number the system will select the client's preferred number automatically - go to **step 9**.

    ℹ️ If you need to make an outbound call to a number that is not held on the system, you can not call this number in the normal way as it is not verified on the system but would still update CIS. Complete the following steps to perform this action.

i To dial a foreign number, submit a request for International Dialling access using TechNow, under Request Something > User Access > Telephony > Office > Manage Telephone Groups, Voicemails, PINs and Telephone Lines > Modify Class of Service. This will to allow you to make the call. When making the call, follow steps 7 and 8 but when leaving out the first 0 from the number replace it with the international dialling code for that country i.e. if the number is 012345678 and you are calling Switzerland (dialling code +41), enter it as +4112345678 in the text box.

8. Drill down on the created call outbound activity, this will navigate you to **Activity detail** view. From the **Activity detail** view select the more info view tab.

9. Enter the number provided in the text box, note that you will need to leave out the 0 from the phone number i.e. if the number is 07123456789 then enter it as 7123456789 in the text box. Continue to next step.

Make A Call

10. *(phone icon)* Select the **Call** icon *(icon)* from the computer telephony interface (CTI) toolbar.

(CTI toolbar image)

i If you get an error message when attempting an outbound call check if the Suppressed flag is checked in the **Contact**, **More Info view**. If it is, you should not be making a call.

11. Upon selecting **Call** your telephone will ring. This is the switch attempting to establish the required voice path for the call. Call recording will start from the moment a connection with the recipient is achieved.

i If the client has chosen to suppress telephone contact, the Call icon will not be enabled. For more information refer to Outbound Contact - Suppress in related items.

i You can also make calls by pressing the green button to the top right of your phone.

Call Successful

12. *(phone icon)* When your call is answered, ask for the person you wish to speak to by name. If you are challenged as to who you are, tell them you are calling from the Department for Work and Pensions (DWP) about a private business matter. If they are not the client or claim that the client is unavailable, go to **step 16**.
If they confirm they are the client, tell them your name (real or pseudonym) and that you are calling from the child maintenance service. Do not reveal any further information until you have gone through the security check and you know you're speaking to the correct person. Security questions must be asked to ensure the client or client representative is the person who answered the phone. There is no required security check for employers when making an outbound call. For more information refer to Security Check.

Once Security has been completed ask the client to confirm their address and contact numbers as well as asking for the most appropriate time for contact. Record this preferred contact time by creating an **Activity – Record** at contact level using a future start date of 01/01/2035. Record the preferred contact times within the description field and set the activity **Status** to **Not Required**. This activity will always appear at the top of the activities tab making it easy for caseworkers to locate the preferred times. Notify the client that you have recorded the preferred contact time however, we may also attempt calls at different times of the day.

⚠ **Never** disclose the personal information we hold - even once security has been passed. If a client provides their details, address, etc thank them for the information but **do not volunteer** the following:

- Address

- Date of Birth

- National Insurance Number

- Bank or Building Society data (however last 4 digits are acceptable)

- Full telephone number (however last 4 digits are acceptable)

- Names of household members - however, you can use a QCs or ROCs first name (under no circumstances should their last name be mentioned) during a call but only once security has been passed

- Names of employers or former employers

- Client's email addresses

- Details of any appointee or person with Power of Attorney

Once the call is complete go to **step 17**.

(i) If you are contacting a client or third party and they haven't been contacted by CMG before remember to provide the false information warning and the confidentiality statement. For further information refer to Policy, Law and Decision Making Guidance ⚖ and ⚖

(i) When contacting a paying parent, ask if they can make a one-off card payment to cover any period of arrears. For more information refer to Credit/Debit Card - One off Payment.

⚠ When the outbound activity has been generated as a result of an ad-hoc activity plan line please refer to **Step 18** to mark the line as not required.

Number invalid

13. If you identify the number for the contact as invalid due to the dial tone, or audio message, select wrong number from the dropdown list of outcome of the call. You will then have to remove the contact number from contact details, and get in touch with the client for an up to date contact number. For more information refer to Change - Contact Details.

Answerphone messages

14. On the occasions that the call is directed to an answering machine, please check the contact acitivty to see if a CMS specific answerphone message can be left. If you can't leave a CMS specific message use the standard message as follows:

    "Hello, this is a message for (Title, surname) from (name, real or pseudonym) at the Department for Work and Pensions. We need to speak to you as soon as we can. Can you please call us on 0345 266 8792 between 8am and 7:30pm, Monday to Friday, or between 9am and 4:30pm Saturday, before (date when the next call will have to be attempted or a letter sent). Please have your 12-digit reference number with you when you call. Thanks very much for your help and we look forward to speaking to you soon."

    After leaving the message update the **Notes** field. This ensures that when the client returns the call, the colleague accessing the system can easily identify the nature of the call and by whom the answer machine message was left. This will enable the individual receiving the call to fully deal with it, or transfer it to the appropriate colleague as necessary. Go to **step 18**.

    This process applies to CMG clients only and is not appropriate for certain stakeholder groups e.g. employers.

15. When the codes answerphone01 (home) or answerphone02 (mobile) are detailed in the contact activity you can leave a CMS specific answerphone message. Please choose from one of the following 4 scenarios:

    - A client has requested a change which we have completed and a letter has been issued.

      Good Morning/Afternoon. This is a message for [client name]. My name is [your name] and I'm calling from the Child Maintenance Service. Following a change to your case I can now confirm we have updated your records and a letter has been sent to you. It is not necessary to contact us at this time. Full details of your case can be viewed on the Child Maintenance Self Service website. If you have not already registered, you can do this now by searching for Child Maintenance Online.

    - Acknowledge correspondence has been received and action will be taken.

      Good Morning/Afternoon. This is a message for [client name]. My name is [your name] and I'm calling from the Child Maintenance Service. Thank you for your recent [call/e-mail/letter] of [date]. The information you have given us is being looked at and we will contact you when we have completed your update. You do not need to contact us at this time. Full details of your case can be viewed on the Child Maintenance Self Service website. If you have not already registered, you can do this now by searching for Child Maintenance Online.

    - Acknowledge a complaint.

      Good Morning/Afternoon. This is a message for [client name]. This is [your name] from the Child Maintenance Service. We have received your complaint letter dated [xxxxxx] and will be in touch with you regarding this by [date]."

    - Update/request for information where the client has not requested the change.

      Good Morning/Afternoon. This is a message for [client name]. This is [your name] from the Child Maintenance Service. Could you please contact us at your earliest convenience, on 0345 266 8792. Our opening hours are 8am - 7:30pm Monday to Friday, and 9am - 4:30pm Saturday.

      Please have your 12 digit reference number and your security information ready when you call. Thank you.

16. When contacting an employer and the call connects to an answering machine, use the following when leaving a message:

    "Hello, this is a message for (Title, first name, surname) from (name or pseudonym) at the Child Maintenance Service. We need to speak to you as soon as we can. Can you please call us on 0345 266 9658 between 8am and 7:30pm, Monday to Friday, or between 9am and 4:30pm Saturday, before (date when the next call will have to be attempted or a letter sent). Please have your 12-digit reference number with you when you call. Thanks very much for your help and we look forward to speaking to you soon."

Update the **Notes** field after leaving the message. This ensures that when the employer returns the call, the colleague accessing the system can easily identify the nature of the call and by whom the answer machine message was left. This will enable the individual receiving the call to fully deal with it, or transfer it to the appropriate colleague as necessary. Go to **step 18**.

Call not answered or not a convenient time

17. If it is not a convenient time for the client to receive the call, or the client does not answer, create a new call back activity setting the date/ time and a reminder will be triggered to contact the client at the appropriate time. For more information refer to Call Backs. If you have reached the point where you decide it is not beneficial to make further attempts, within the **Notes** make a record of the reason the decision has been made to end making further attempts to contact the client. Consequence:Failure to follow the correct process may result in unessary client inbound contact.

     If a contact has failed the security check and the caseworker believes the contact is not Client/Client Representative, the caseworker must terminate the call and send the information to the **Security Advice and Support Centre** flagging this as a priority, if it is the third consecutive failed call complete the bogus caller form. When completing the form use the **Features of call/Further details** section to record the scheme client identification number (SCIN) of the contact you were trying to call.

     To contact the Security Advice and Support Centre and access the form select the following link: Security Advice and Support Centre

18. After every outbound call, the outcome of the call must be recorded within the telephony outcome list. This is a mandatory field with the following set list of outcome values:

     - Client Wishes to Call Back
     - Bogus Call –Security Report
     - Call-Back Request
     - Call Resolved
     - Call Terminated by Client
     - Call Terminated by CMG
     - Call Transferred
     - Client Unavailable
     - Failed Security Check
     - Line Engaged
     - Lost Connection
     - No Answer
     - Signposted to DWP Dpt
     - Signposted to Options
     - Signposted to other Org
     - Unresolved –Escalated
     - Voicemail –Message Left
     - Voicemail –No Message Left
     - Wrong number

     If the call was unsuccessful and no further attempts are to be made, update the **Status** of the activity to **Not Required**.

     The call activity will not close if an outcome from the list is not selected.

Updating ad hoc activity

19. When the outbound activity has been genarated as a result of an ad-hoc activity plan line please take the following steps to ensure that the 2012 system recognises that the activity is not applicable.

20. From within the SR that you are taking the action select the More Info view.

21. Run a query for Ad-hoc activities and manually update the status of the ad hoc action you have created to **Not required**.

Answering A Call

Incoming call

(i) Callers are asked to enter their scheme client identification number (SCIN), which triggers the caller identification process. If a client is unable to do this they are transferred automatically to the general inbound call handling team.

1. To answer an incoming call select the **Accept Call** button on the computer telephony interface (CTI) toolbar.

⚠ If there is a delay in the call activity showing, navigate to the contacts tab and back to the activities tab, the activity now shows.

Greet caller

2. On answering the call, greet the caller in a professional manner. e.g. Good (Morning/Afternoon/Evening), thanks for calling the Child Maintenance Service, my name is…… (give your first name), can I take your full name and 12 digit reference number please?

Interpreter needed?

3. Within the **Language Selection** in the **More Info** view check if the caller requires an interpreter and which language they speak. Visit The Big Word - Translation Service to find the relevant language code.

4. When interpretation services are needed, select **Conference**. This opens the phone book, select **External** and contact the interpretation services to arrange a three-way call. For more information refer to Interpretation.

Perform security check

5. Go through security checks with the caller before divulging any information. If the call is a general enquiry and not case related, security checks are not necessary. For more information refer to Security Check.

Preferred contact times

6. Once Security has been completed ask the client to confirm their address and contact number as well as asking for the most appropriate time for contact. notify the client you have recorded the preferred contact time however, we may attempt calls at different times of the day. **Step 8** advises how to record this information on the system.

Answerphone Messages

7. Confirm with the client if they are happy that we leave more specific answerphone messages by following the below script:
When I call you again, if you're not available, would it be ok if I left you a message which will advise I am calling from Child Maintenance Service giving you an update to prevent you having to call us back? We will not leave case specific details in the message but where appropriate a letter providing full information will follow a few days later.
I see we have your home/mobile [detail as appropriate] number(s) listed. Which number are you happy for us to leave a message on? Please inform us if you would prefer that we did not do this in future.

8. Information on preferred contact times and CMS specific answerphone messages can be recorded by creating an **Activity - Record** at contact level with a **start date** of 01/01/2035. Record the preferred contact times within the description field in the format of 24hr clock. If the client would like to be left CMS specific answerphone messages please input the below codes into the activity alongside the preferred contact times:

   - For home telephone number enter code **answerphone01**

   - For mobile telephone number enter the code **answerphone02**

(i) This activity will always appear at the top of the activities tab making it easy for caseworkers to locate the preferred times. Notify the client that you have recorded the preferred contact time however, we may also attempt calls at different times of the day.

9. When the caller is a client/third party client representative, the details of the case you're dealing with is automatically minimised and saved to return to after the call. The details of the client calling are displayed on the screen in time with the call.

⚠ The client representative's information is not displayed when the representative calls, instead the first contact is. To obtain the client representatives information, navigate to **Cases** and then **Service Request** (SR) and select the **Manage Client Representative** SR.

(i) If a caller has dual roles (i.e. they are both a receiving parent and a paying parent the SCIN they enter is for both roles.

In these circumstances, the client is treated as a receiving parent and asked to enter the date of birth of the qualifying child (QC). If they are calling in relation to the case in which they are a paying parent the caseworker transfers their call to the appropriate team if necessary. For more information refer to **Transferring A Call** below. For more information refer to the generic DWP guidance on disclosing information to third parties.

When the person calling is not a client and they are calling to make an application, a new application must be started. For more information refer to Application - Receiving Parent, Application - Paying Parent or Application - Child In Scotland. Provide the false information warning. For more information refer to Policy, Law and Decision Making Guidance.

Where a call is received from a client who wishes to talk about their 1993/2003 scheme case, transfer the call via the 1993/2003 scheme national helpline (NHL), who identify the owning caseworker and route the call accordingly.

10. Find out the reason for the call. When the call is related to setting up a new case, transfer the call to the application service. For more information refer to Application - Receiving Parent, Application - Paying Parent or Application - Child In Scotland.

Attempt to answer the query straightaway, record and document the details. If further information is needed attempt to answer the query within two days. If you are unable to answer the query, select the appropriate area and transfer the call.

For more information refer to **Transferring A Call** below.

11. If the caller is requesting a new application and no-one is available within the new application segment, the call is answered by the general inbound call helpline (GICH). As the new applicant details are not registered on the system it is not possible to set up a callback service request (SR). A call back will need to be requested using the call back request small system. For further information refer to Call Backs.

12. Where a call has been received requesting new action to be taken on a case owned by another caseworker, the appropriate SR should be raised.
Where you have received general information from the client or information which needs to be passed on to another caseworker, raise a **General Enquiry** SR:

- **Process = Manage Inbound Call**

- **Area = General Enquiry**

- **Sub Area = General Enquiry**

When creating the SR, remember to assign it to the correct case.

13. Record any comments regarding the conversation in the **notes** field.

14. Change the status of the SR to **Pending Assignment**.

15. Update the **call activity description** with a brief note of the call. Select the **Call Retention Type** from the list of values provided to save the inbound call activity:

- **CM Case Related** – used for calls where a case is discussed

- **CM Non-Case Related** – used for general enquiries

- **Employer** – used for employer calls

- **CM Multiple Case Related** – used when more than one case discussed

- **Options Prospect Related** – used when Options has transferred the call and the call leads to a case.

- **Options Non-Prospect Related** – used when Options has transferred the call but no Child Maintenance (CM) service required.

- **Non-Commission Related Call** – used when caller does not wish to speak to CM e.g. asks to talk about benefits or Child Benefit

The **Call Retention Type** field may auto populate, if this occurs with the wrong information, manually update this.

16. After every inbound call the outcome of the call must be recorded within the **Call Activity** field using one of the following:

- Client wishes to call back

- Bogus call – security report

- Call-back request

- Call resolved

- Call terminated by client

- Call terminated by CMG

- Call transferred

- Client unavailable

- Failed security check

- Line engaged

- Lost connection

- No answer

- Signposted to DWP dept

- Signposted to Options

- Signposted to other org

- Unresolved – escalated

- Voicemail – message left

- Voicemail – no Message Left

- Wrong number

The Call activity will not close if an outcome from the list is not selected. The **Description** field can be used to record any additional information.

If the caller is a receiving parent with multiple cases they may request information about another case in a different area, if this is the case do a 'warm transfer' to the owning caseworker or area they require additional information from.
For more information refer to the below webpart Transferring A Call.

Transferring A Call

Transfer call

1. Explain your reason for transferring the call to the client, advise them that there may be a wait period involved and that they will be put straight through to the caseworker once you have explained the reason for the call. Record the reason for the transfer in the **Notes** field.

2. Select the appropriate qualifying child's (QC's) case in **Contact Summary**.

   You cannot select QC details if the call is from "Other party" as they will not have a QC on the case.

3. Select the icon for consultative transfer (this is a warm transfer) from the computer telephony interface (CTI):

4. Select the number of the relevant case owning caseworker from the phone book or the team, segment or external number that will be best able to provide an answer to the query.

5. Press **Call** (No interaction with the your physical phone is required). This puts the client on hold while you discuss the case with the caseworker. You will be placed in a queue for the case owning caseworker or the next available caseworker if the owning caseworker is unavailable, you will retain the call until a full explanation is provided to the caseworker.

   If you know the staff number you can search for a caseworker using the **Agent Search** facility within the phonebook. Staff numbers will appear under owner next to service request (SR) on the 2012 system if they are allocated to a specific caseworker. You can also search by the caseworker's name (if known). If the caseworker is available they will have a **Call** icon next to their name, which can be selected and the system then dials the number. If the specific caseworker is not available, the name of their team/segment will appear underneath their name as a hyperlink, and when you select this it will drill down and give you a **Call** icon next to the team/segment name (providing someone is available within the team/segment). If the name or staff number is not known, you can select the Group Search within the phonebook and it will again show you the team/segment name with a **Call** icon next to it, if someone is available within the team/segment.

6. Select the **Transfer Call** icon, the call will be transferred to the other caseworker.

7. Once done select the **hang up** icon to leave the call.

Blind transfer

Only caseworkers from the General Inbound Call Handling Team (GICHT) will be able to transfer calls without speaking to the destined caseworker (blind/cold transfer), in emergency situations only, such as a strike or if there are technical problems with the 2012 system. It is only at these times that the Blind Transfer icon will be enabled on the CTI.

Note that for 1993 & 2003 schemes phone numbers you will need to contact the 1993/2003 scheme National Helplines via the external tab within the phonebook. Separate numbers are stored there for both the 1993 & 2003 Schemes.

8. The **Contact Summary** screen will be displayed on the monitor of the caseworker receiving the call, when they answer the phone.

9. After transferring the call, the outcome of the call must be selected from the **Telephony Outcome** field within the **Call activity**. Select **Call Transferred**. The call activity will not close if an outcome is not selected.

Where a client wishes to discuss their 1993/2003 scheme case, you will need to contact the 1993/2003 scheme national helpline (NHL). They will identify the owning caseworker and transfer the call accordingly.

If a case has an incident raised against it you will see that it is assigned to **SADMIN** as in the screen shot below:

NICMS replaces CMG in Northern Ireland

Application - Child In Scotland

Application - Paying Parent

Application - Receiving Parent

Call Backs

Call - Hearing and Speech Impaired

Change - Contact Details

Child Support Forms

Face To Face - Arrange

Interpretation

Employer Overview

Security Check

Outbound Contact - Suppress

Telephony Overview

Terminology Changes

Translation

Can QC's names be disclosed?

It is CMG's policy not to disclose the surname of any child named in a child maintenance application, to the paying parent. Notifications specifically refer to the child/children by their first names only.

How can I identify if a client has declared domestic violence?

To ensure sensitivity during calls you can identify from CMS2012 when domestic violence has been declared and accepted. The way you identify this varies depending on your role:

Caseworkers Action

Select the **New Application SR** at case level. When domestic violence has been declared and accepted the exemption reason will be recorded as '**Domestic Violence accepted'** in the **Application Charging Exemption Details applet**.

Team Leader Action

Select case from within '**My Team's Cases'**. When domestic violence has been declared and accepted the exemption reason will be recorded as '**Domestic Violence accepted**' in **Case Details/Set Up & Assignment applet**.

Is there a function to input a client's preferred time of contact?

Confirm the clients preferred contact time and record this on the system at contact level by creating an Activity - Record with a future due date of 01/01/2035. Record the preferred contact times within the description field. This activity will always appear at the top of the activities tab making it easy for caseworkers to locate the preferred times. Notify the client that you have recorded the preferred contact time however, we may also attempt calls at different times of the day.