

## Work Allocation

This procedure is provided as background and educational guidance, not as a step by step guide. It will complement available training material. The procedure will explain how work will be automatically assigned by the system, how work can move from one segment to another and descriptions of work.

A fundamental titled CMS Work Management/User Access Overview has been written which may provide more help and information on this subject. You can find it on the fundamentals page [here](#).

 This procedure uses the terms receiving parent and paying parent.


The receiving parent is the parent who receives or who is expected to receive child maintenance, known as the parent with care (PWC) or person with care (PeWC) on the system and in legislation. The paying parent is the parent who pays or who is expected to pay child maintenance, known as the non resident parent (NRP) on the system and in legislation.

### Description of work

Work is any activity that gets assigned to a caseworker to carry out. It can be cases at the application stage, casegroups, inbound correspondence or service requests (SR). SRs are completed by following an activity plan which is made up of smaller activities. The activity plan is generated automatically once the status of the SR has been started. For the purposes of this work allocation procedure we will focus on SRs.

### Work Routing

Work will be routed by the system according to business rules. These rules determine which segment work is assigned to.

 As an example of the routing rules, if a new application is received where neither party has an existing case, it will be automatically routed to the new case segment. It will not be routed to the maintenance segment until a point after the promise to pay (P2P) schedule has been issued.

### Casegroups

All cases which share the same paying parent are held together in a casegroup. When a caseworker has been allocated a case group they will be responsible for completing all work on all cases within the case group. The exception to this is functionally unique SRs which will be processed by the specific team to which they are assigned. See the section below on service requests for further information. If a receiving parent has more than one paying parent then they will feature in more than one casegroup. If a paying parent is also a receiving parent then they will also appear in more than one casegroup.

### Case movement

Factors which can affect where a case group is assigned include paying parent postcode, income source and the lifecycle of the case. When any of these factors are changed, the case will move automatically. If a case group is transferred to another segment then all associated work connected to the case group will also move to the new segment. Caseworkers should ensure that all relevant work items are completed first, as the case will flip to the new owning segment when the SR is completed.

An exception to this could be cases where the paying parent's residential address is not a United Kingdom address. If some of these factors contradict each other then there is a clear hierarchy which decides where work is assigned. An example of this could be where an application is received where one of the parties involved is classed as nationally sensitive. Instead of being handled by the standard application teams, the system recognises that it should be assigned to the special client records segment


 If a team move is complete for a user or 2012 access is removed from a user who has work allocated to them, these cases will become orphaned, the cases will not be visible to any case worker, team leader or segment manager. To have these cases recovered contact your local IT Team.

### Service requests

SRs are used to manage work in the system and are similar in some ways to tasks in CS2. Using SRs records that a work item needs to be completed and guides caseworkers through completing activities.

There are two types of SR, these are functionally unique SRs and case owning SRs. Case owning SRs will always be completed by caseworkers in the case owning segment. Functionally unique SRs are completed by specialist teams, which are given the SR to complete with 'read only' access to the relevant case group. The casegroup remains with the caseworker in the case owning

segment. Functionally unique work items will route depending on the post code of the person they are raised against. This means that it won't always go to the same area as the casegroup e.g. the paying parent lives in Northern Ireland and the casegroup is therefore held in Northern Ireland. The functionally unique SR is raised against the receiving parent who lives in Wales and the SR routes based on the Welsh post code.

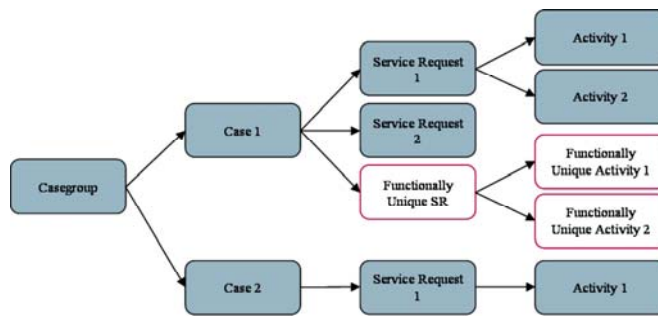
 As the case owner, when creating a functionally unique SR, consider making an **SR Notes** entry to provide some background information and context for the specialist caseworker who receives the SR.

 Complete all mandatory fields when you create an SR. If an SR attached to a case has greyed out mandatory fields raise an incident. For more information refer to [Incident Management - Manage Incident Locally](#).

Each SR includes an activity plan, which is made up of separate activities that a caseworker will complete. The activities are actions that must be completed in order to close the SR. The SR cannot be closed with open activities.

If a team leader wants to access an SR that is assigned to a caseworker they can only do this via the My Team Service Request view.

The following diagram is for illustrative purposes only, and demonstrates what makes up a casegroup.



[BOM Overview](#)

[Work Management](#)