


Client Representative - Maintain

This procedure will explain the steps taken to manage a client's case through the client's legal representative/power of attorney (PoA). A representative is a person or persons responsible for acting on behalf of a client when they are unable to, or find it difficult to deal with their own case themselves. A representative can be a relative, parent, sibling, solicitor, accountant, health worker, carer, etc.

 Certain third party organisations may have PoA (legal and none legal) on a clients case e.g. Fathers for Justice.

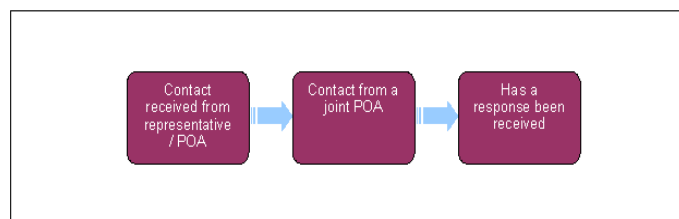
When a representative contacts the Child Maintenance Group (CMG) to report a change or perform a process on the client's case, this will be performed instantly if the representative/s can be verified on the system.

If there are multiple PoAs on the case that are registered as joint representatives, the caseworker must receive authorisation from all of the representatives before any changes can be made on the case. For more information refer to [Client Representative - Power of Attorney](#).

When authorisation is not given or cannot be retrieved from the joint PoAs, the caseworker must inform the PoA that the changes cannot be made without full authorisation and end the process.

Where a client representative has requested a change be made to their own contact details, the caseworker will need to send a request to the Service Management team, who will make the necessary changes to the client representatives contact record.


For more information refer to the Policy, Law and Decision Making Guidance 



 When speaking to clients always use the new terminology. For more information refer to [Terminology Changes](#).


Contact received from Representative/Power of Attorney (PoA)

1. When a PoA contacts the Child Maintenance Group (CMG) to make changes to their details or to a client's case, check whether they are a joint PoA.
2. If the contact is not a joint PoA, continue with the process they wish to complete by raising the appropriate service request (SR).

For more information on representatives, refer to the Policy, Law and Decision Making Guidance 

Change to client representative details

3. Where a client representative has requested a change to their details contact Service Management who will complete the changes. Open up an e-mail in Microsoft Outlook and enter the subject heading '**Client Rep Contact Information Update Request**'.

 If amending details for a solicitor/organisation where there is no SCIN for the representative, follow procedures for [Third Party - Amend](#).

 If a client representative has blocked their PIN number/security details, these cannot be reset. Update the **Notes** to advise that for any future contact, for security purposes ask the client representative transaction related questions. For further information, see [Security Check](#).

4. In the main body of the e-mail, enter the following information about the client representative:
 - Full name

- Scheme client identification number (SCIN) or national insurance number (NINO)
- Any current contact information on the system that needs to be updated e.g. full address including post code, home/mobile telephone number
- Any new contact information that needs to be updated e.g. full address including post code, home/mobile telephone number.



If the change relates to a case held in the Special Client Records Segment, record this in the e-mail.

5. Send an e-mail to the Service Management Team e-mail inbox **DWP CM Config & Data Management Team**. Add a read receipt to the e-mail to confirm it has been received. Once sent, ensure that it is deleted from the **Sent Items** folder in Outlook.
6. Add a suitable entry in the **Notes** field of the client representatives contact record, for example:



Client Rep reported change of name/address and/or telephone number. Unable to update details on the system. Request sent to Service Management team to update the contact record.

7. Set an Outlook calendar reminder for two days to go back into the system and check that the change has been made (Service Management team will have made a note of the change made on the contact record).




Service Management aim to complete requests within 24 hours when possible, but all requests will be completed within 48 hours.

Contact from a joint PoA

8.  When the contact is a joint PoA, confirm with them the changes or process they wish to complete, inform the contact confirmation needs to be obtained from the additional PoA/s on the case. If the request is by letter call the PoA making the request to inform them of this.
9.  Call all of the joint PoAs on the case to confirm that they authorise this.
10. Set an Outlook calendar reminder for 14 days to wait for the response from the other POA/s.

Has a response been received

11. If the additional PoA/s have responded and any do not give their consent, or there has not been a reply from one or all of them, call the PoA to inform them that their request cannot be processed and end the procedure.
12.  When authorisation has been given from all of the PoA/s on the case, call the relevant PoA to inform them of this and complete the process they require.



The PoA/s can complete any process that a client can on a case.

NICMS to replace CMG in Northern Ireland

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[Terminology Changes](#)