Client Contact-Outbound-E Mail

The purpose of this procedure is to show you how to make a general contact to a client, by E Mail, when no notification needs to be issued. This offers an alternative channel of communication to our clients.

This functionality is available throughout CMS and can be used by all caseworkers. Use of E Mail as a method of contact must be in line with DWP Guidance and DWP Security and authorisation see also DWP Approved circumstances for OFFICIAL with third parties and must only be used in approved CMG scenarios.

Currently there is a set criteria for contacting clients by this contact method. The client must be a Self Service user and be enquiring about the following;

- A missing payment enquiry
- A general account calculation enquiry

The approved responses for the valid scenarios must be taken from Lines to take. When Lines to take opens you must select Open in Word from the toolbar to enable you to copy the relevant paragraph(s).

Consideration should be given regarding the security risks in sending out official E Mails to clients. Under no circumstance should personal data, NINO, DoB, bank account, building society, or payment card account numbers etc. be contained within the E Mail.

Where the paying parent/receiving parent has no valid E Mail address recorded on the 2012 System, you will not be able to contact them by E Mail.

No relevant SR raised

If there is no relevant SR raised you will need to manually create one via an activity:

Process – **Manage inbound contact**

Area – **General Enquiry**

Sub Area – **General Enquiry**

If a relevant SR has already been raised

If you do not want / need to send a letter to the client and if a relevant SR has been raised for the inbound contact e.g. an inbound activity received from a Self Service client about a missed payment or a general account calculation query select the type of correspondence you wish to create:

1. Select Type – **E Mail – outbound**, in Activities applet select **New**, tick the **Global Flag** column this will provide you with E Mail templates available for you to select from
2. Select the appropriate template from Template Name dropdown menu, **CMSL5515** (client) or **CMSL5508** (representative)

   You must only copy and paste approved messages within the template. Under no circumstances should freetext be used in the E Mail
3. select **Create Correspondence**
4. Select **Open Generated Document** to view the document
5. TL authority is required on E Mails sent to the client, change the SR Status to Pending Approval
6. If not changed automatically, change the Sub Status of the activity to Submit for Approval – TL to send the SR to the TL's approval queue

Team leader reviews document

7. Check the E Mail is correctly addressed and meets quality standards, e.g. correct paragraph(s) has / have been selected, no freetext has been used and no spelling errors. Once satisfied select **Complete** and then **OK** on the Correspondence Saved tab. Correct any minor mistakes where applicable and **Complete**, or select **Close** to reject the approval work item and return to the caseworker for correction

8. If the document is approved, select **Approve**
9. If E Mail is rejected the system creates an Editable Letter Review task to record the reasons for the rejection. Once added the E Mail template is returned to the caseworker.

Caseworker - amend / send the document

10. If work item has been rejected access the E Mail template via **My Activities**.
11. Amend the E Mail with the required corrections and re submit to the TL as at step **5** above
12. Once approval has been given select **Send E Mail**
13. The status will change to **Successfully Fulfilled**
14. Ensure all actions within the activity plan have been competed and change the Status of your SR to **Closed**, this will end your process

If an E Mail fails review the error tab to identify and complete any corrections required (E Mail address not being present or in the wrong format). If there is still an error, or it's a very technical error message then retry 3 times over 24 hours to send the E Mail before raising an incident.

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The E Mail subject line is defined by the E Mail template selected. The E Mail will be displayed as internal.cmg@dwp.gsi.gov.uk. The subject field of the E Mail will display: important Information about your Child Maintenance case.

E Mails that are editable contain paragraphs that are read only, paragraphs of text that are editable and optional paragraphs within the same template. You must only copy and paste approved messages within the template. Under NO circumstances should freetext be used in the E Mail

Remember all client enquiries must be responded to within 2 days

Related Items

Client Contact Overview

Client Self Service

Self Service Overview