Department for Work & Pensions Procedures ▸ Contact Summary

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Contact Summary

This procedure will explain how to obtain and use the information available on the **Contact Summary** view displayed to any caseworker when an incoming call is taken from a client.

The system will automatically populate the screen when a call is taken.

General caller details are displayed at the top of the screen. More detailed information is available when the following tabs across the middle of the screen are selected:

- Summary
- More Info
- Client Rep
- Relationships
- Interaction - in this tab you can view previous inbound and outbound calls and letters
- Profile
- Payments Info
- Enforce Orders

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

Accept incoming call

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

Review summary information

The caller has been identified before being passed to the caseworker. Callers will be asked to enter their scheme client identification number (SCIN), which will trigger the caller identification process. If a client is unable to do this they will be transferred automatically to the general inbound call handling team. Only calls which can then be identified by them will reach the caseworker.

For more information refer to Call – Overview.

2. Once the call is accepted the system will automatically display the callers details in the **Contact Summary** view.
3. The default address displayed will be the client's residential address. It is possible to view other contact related addresses (eg a correspondence address) from the Contact Addresses view. For more information refer to Change - Address Details.
4.

Details displayed on the top half of screen:

- Contact Title, Contact Last Name, Contact First Name, Contact Middle Name – full details of the caller
- SCIN - the scheme client identification number
- Contact Status - will advise if the callers NINO has been verified
- DOB, NINO, Gender – caller details
- Client representative – will give details of the clients appointed representative where they have one.
- Employment Status – employed, self-employed, or not employed
- Potentially Violent – this box will be ticked if caller has been given potentially violent status
- (Main) Home Phone, Business Phone, Mobile Phone, Email – the callers contact details

- PCM (preferred contact method) - the callers chosen method of contact from above

Select detailed information tabs

5. The tabs across the middle of the screen will give more detailed information when selected.

   When a call is accepted the **Summary** tab will automatically populate. All other tabs must be selected to display the information they contain.

   The tabs are as follows:

Summary tab

6. This screen will automatically populate when a call is accepted, as in the screenshot above. It will show:
   - **Activities** - will display all of the activities linked directly to the contact as well as all activities which relate to outbound correspondence
   - **Service Requests** - will display all SRs directly linked to the contact whether or not they are linked to a case
   - **Case Roles** - will show all of the cases related to the contact specifying the relationship type played by the contact in each case as well as information about the relevant QC.

More Info tab

7. This screen will show more detailed information about a contact.

Client Rep tab

8. This screen has two sub views:

   Responsibilities will populate automatically and display all contacts for which the person in question is a client representative.

   It will display two applets:
   - **Responsibilities** – a list applet detailing all of the contacts the person is a client representative for
   - **Contact Details** - which will show overview information for the contact selected

Relationships tab

9. This screen contains three applets as follows:
   - **QCs/ROCs** – will display information about the qualifying child/children (QC's) and relevant other children (ROC's) for a given contact
   - **Shared Care** - will display the shared care details for any QC/QC's highlighted in the **QCs/ROCs** applet. It would not populate for any ROC relationship
   - **CIS Matches** – will display any matches found through the Customer Information System (CIS)

Interaction tab

10. This screen will show details of a callers previous contact including the following information:
    - **Inbound Interaction** - all previous inbound telephone calls and letters to the caller. To view previously received inbound letters, find the required inbound activity and drill down through it.
    - **Outbound Interaction** - all previous outbound telephone calls and letters to the caller. To view previously issued outbound letters, find the required outbound activity and drill down through it. Any documents issued relating to this activity will be present in the **Generated Documents** box.

Profile tab

11. This screen will detail a callers income types, including figures provided by HMRC, CIS and the client. It will display three applets as follows:
    - **Income** – will show overview figures of the income earned by a given caller
    - **Income Account** - will show the gross and net income earned figures per employer
    - **Account Income Details** – will display contact information for the employer selected in the **Income Account** applet

Payments Info tab

12. This screen shows financial information about the caller:
    - **Financial Account** - displays all of the BaNCS accounts associated to a specific caller and the role this person plays within the case, as well as basic payments information
    - **Payment Profile** - displays an overview of payments information related to a specific account
    - **Payment Schedule** - displays what is owed by a receiving parent for the coming year, against what is to be paid in the promise to pay schedule
    - **Transaction History** - details all of the individual line items against a BaNCS account

Enforce Orders tab

13. This screen shows details of any enforcement action taken against the caller:
    - **LOs** - displays all liability orders (LOs) associated to a caller
    - **Work Items** - displays all LOs dependent actions associated to the LO selected above
    - **QCs/ROCs** - displays summary information about the relevant children associated to the contact

Call - Overview

Call - Routing

Change - Address Details

Confirm Current Location

Terminology Changes