



## Employer Account Manager - Allocate, Change, Remove

This process enables the caseworker in the employer service to establish if an employer's assigned account manager status is correct.

An employer account manager will aim to make sure we deliver a quality service to prevent delays in the transfer of payments to parents with care, building a relationship with employers and agents, answering any queries that may be received.

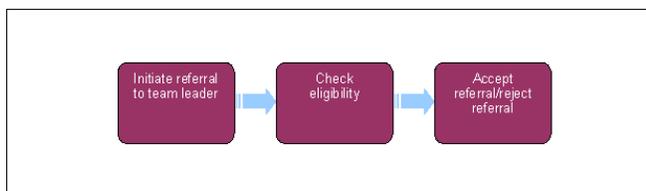
Account managers will be offered to employers that meet the specified criteria, although employers who meet the criteria do not necessarily have to have an account manager allocated to them.

If, during contact with an employer, the caseworker decides an employer requires an account manager, or needs their account manager status to be changed or removed, they would record the details on the system and send the referral to their team leader for approval.

If the team leader agrees with the referral they will allocate an appropriate account manager, or change/remove as necessary and a confirmation letter is sent.

If the team leader disagrees with the referral, an account manager is not allocated or the changes are not made and the referral is rejected.

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](#).



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.

### Check for active account manager

1. Search for the employer and select the hyperlink in the **Account Team** field, if your segment managers staff number is present there is no account manager assigned, if an account managers staff number is present, they are assigned to the employer.

### Refer to team leader

2. The criteria for an employer being allocated an account manager include but are not limited to:
  - The employer has a large number of paying parents with active deduction from earnings orders (DEOs)
  - The employer's situation is particularly complex and requires the dedicated attention of an account manager
  - The employer has made a complaint to the Child Maintenance Group (CMG) and the caseworker resolving their complaint feels the employer would be best suited to having a dedicated contact for future use.
- 3.

Once you have established that an employer appears to meet the criteria to have an account manager allocated to them, or that an employer wants their current account manager status to be changed or removed, explain to the employer that you will raise their request but that it requires further authorisation. Raise a service request (SR) to make a referral to your team leader for them to authorise the request. Choose the relevant value from the sub area drop down.

### Check eligibility

#### Team leader action

4. Check the details of the referral to determine whether the employer meets the requirements to have an account manager assigned, or have their account manager status changed or removed. Complete one of the following actions:
  - To assign an account manager, go to **step 6**
  - To remove an account manager, go to **step 10**

- To change an account manager, go to **step 14**
- When rejecting the referral fully document the reasons in the service request (SR) **Notes**, go to **step 5**

5.



When rejecting the referral, eg rejecting the request that was made by an employer, issue either:

- CMSL8004 - Account manager request denied
- CMSL8006 - Account manager change request denied

### Assigning an Account Manager

6. Select **Work Management** and **Employer Accounts** to retrieve the employer record.
7. Search for the employer in the **Employer** list, select the employer and select **Assign**.
8. Select the caseworker to be the Account Manager and select **Ok**.
9. Once the account manager has been assigned and following the employers request, issue CMSL8003 to the employer.
- Once an account manager is allocated, any SR/s will go directly to the assigned account manager. Any telephone calls will likewise route to the account manager if the employer enters their Employer Reference Number (ERN) in to the telephony system.

### Removing an Account Manager

10. Select **Work Management** and **Employer** accounts and go to the caseworker who is assigned to that account.
11. Search for the **Employer Account** within the **Account Managers Allocation**.
12. Select the employer and select **Reassign**, locate and select the **Segment Manager** and select **Ok**. The account will now be assigned to the segment.
13. Where the account manager has been removed following the employers request or a letter stating an account manager has been assigned has been sent, issue CMSL8007.

### Changing an Account Manager



To be used where a team leader needs to reallocate an account manager due to leave etc.

14. Select **Work Management** and **Employer** accounts and go to the caseworker who is assigned to that account.
15. Search for the **Employer Account** within the **Account Managers Allocation**.
16. Select the employer and select **Reassign**, locate and select the caseworker who is the new account manager and select **Ok**.
17. The account will now be assigned to the new account manager. Where the account manager has been changed following the employers request or a letter stating an account manager has been assigned has been sent, issue CMSL8005.
- Where the change is the result of work load, a letter doesn't need to be sent.

For further information on letters to clients refer to Letters (Outbound) - Send to Client

#### CMSL8003 Your personal account manager

This letter is sent to the employer when they are first appointed an account manager.

All fields in this letter are system generated, no manual intervention required.

#### CMSL8004 Managing your employer account

This letter is sent to an employer who has expressed an interest in having an account manager appointed – but we are declining their request for an account manager. This letter should only be sent if the employer has explicitly requested an account manager and we have discussed their request over the phone.

All fields in this letter are system generated, no manual intervention required.

#### CMSL8005 Your new personal account manager

This letter is sent to an employer when their account manager changes – this will usually be because the nominated account manager has stopped working for us or because the employer has requested a different account manager.

If necessary complete the optional free text explaining the reason for the change, and apologising if necessary.

#### CMSL8006 Your personal account manager

This letter is sent to an employer when their account manager hasn't been changed after an employer has requested a different account manager. This letter will not be used for the MOD.

Complete the free text explaining why the change has been declined.

**CMSL8007 Your personal account manager**

This letter is sent to an employer when their dedicated account manager has been removed from their account. This could be either because they have requested not to have an account manager or because it has been decided that they don't need an account manager.

All fields in this letter are system generated, no manual intervention required.

**Employer/Agent Contact**

**Terminology Changes**

Will the caseworker require authorisation to add, change or remove the employer accounts manager?

Yes - authorisation will be by team leader

**What is the role of the employer accounts manager?**

To deliver a quality service, to prevent delays in the transfer of payments to receiving parents, building a relationship with employers and agents and answering any queries that may be received.