



Letters (Outbound) - Send By Fax/Email

The purpose of this procedure is to show you how to send a letter you have created on the system by fax or E Mail.

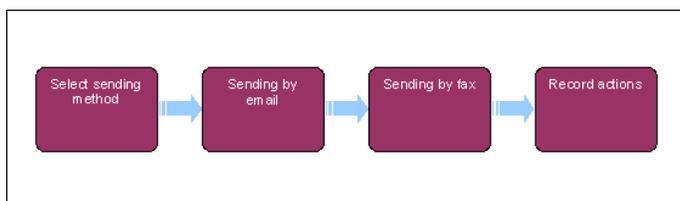
This action is available to all staff within the Child Maintenance Group (CMG) and the fax or E Mail will be issued via the system by the CMG's print fulfilment service, Fulfilment House.

The CMG's standard method for written contact is by system issued letters. In some exceptions you will be required to send a letter or document by fax or E Mail. These methods will be used mainly in enforcement cases for deduction orders, contacting bailiffs or transferring court documents.

If the paying parent/receiving parent has no permanent or correspondence address recorded on the 2012 System, they should be encouraged to use the client self service portal to receive their correspondence.

 Where the paying parent/receiving parent has no permanent or correspondence address recorded on the 2012 System, you will not be able to send any letters to them by E Mail.

 If a message is received via the Self Service web portal and there is no notification / letter required to respond to the query see [Outbound Contact - Client - E Mail](#)



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

Select sending method

 When issuing a stand alone email to a third party (e.g. Cellmark) follow steps 21-27.

 Where the paying parent/receiving parent has no permanent or correspondence address recorded on the 2012 System, you will not be able to send any letters to them by e-mail. In these circumstances, encourage clients to use the client self service portal to receive their correspondence. Third parties do not need to have a permanent/correspondence address recorded.

1. When you need to send a letter via an email or fax you need to follow the steps within [Letters \(Outbound\) - Send To Client](#) to create the letter or document you wish to send.
2. Select the type of correspondence you wish to create:
 - Email: Select **Type - Email** rather than letter if an e-mail is required, this will provide you with email templates available for you to select from.
 - Fax: Create your letter as standard and create a new activity for the covering letter to be issued with the fax. Go to the **Global Flag** column, select the cell and tick the box. Change the activity to **Fax - Outbound**, the system generate the covering letter templates (CMSL5505/CMSL5506). Once created attach the document be sent to the fax template and this will be sent as one complete fax.

 If a fax number isn't showing on the system for a third party, refresh the data by coming out and going back into the activity, if a fax number is registered on the case the number should now be visible.

All of the above steps are provided within the procedure [Letters \(Outbound\) - Send To Client](#), detailing how to attach documents and create documents using letter templates. If you need to resend or forward a letter via an e-mail or fax, refer to [Letters \(Outbound\) - Third Parties/Forward](#).

3. Once you have created the letter, gained team leader authorisation, where applicable and ensured the letter is ready for issue, select the delivery method from the drop down box within **Correspondence**, selecting either **Fax** or **E-mail**.
4. If the system holds the fax or e-mail address, this will pre populate, ensure the address is correct, if not, amend it. When no e-mail address or fax number is held, you will be required to add one. You can type this in manually if you need to. For more information refer to [Change - Contact Details](#).
5. Set the **Fulfilment Method** within the 2012 system to **Fulfilment House**, this changes the **Status** to **Ready For Fulfilment** and the system sends the correspondence by the chosen method. For emails refer to **step 7** and for fax refer to **step 15**.

- For any letters that need a signature, you will obtain the signature and rescan the document for system issue. For more information refer to [Letters \(Outbound\) - Send To Client](#) and [Scanning - Local](#). If the letter was generated as a result of an ad hoc activity plan line go to **step 28** to mark the item as **Not required**.



Caseworkers can open the generated document by selecting **Open Generate Document**, provided under the **Generated Documents** applet if they need to view the correspondence before sending.

Sending by email

- Any correspondence sent by email is be sent to a single email address that is held within the contact details.
- Where an email contains sensitive information, for example emails for court or bailiff action, they are encrypted to ensure a secure transfer of data. For more information refer to [Pretty Good Privacy \(PGP\)](#). For more information about the Data Protection Act refer to the Policy, Law and Decision Making Guidance 
- The email subject line is defined by the email template selected.
- Emails that are editable contain paragraphs that are read only, paragraphs of text that are editable and optional paragraphs within the same template.
- If an e-mail fails there are an agreed number of attempts to resend an email message by the fulfilment provider within a defined period.
- Failed email delivery messages are reported to the CMG shortly after their issue and will be updated once received.
- If you receive a failed delivery method ensure you have the correct email address, contact the recipient if required to confirm address details. To record your actions and close the service request (SR) refer to **step 22**.

Sending by fax

-  When sending a document by fax, once sent, call the recipient and confirm arrival, update the **Notes** within your SR.
- The system has the ability to send a fax to a client, employer or third party using the fax number held on the contact record.
- The issue of correspondence by fax is by specific, single document request only from clients, employer or third parties.
- A fax consists of a cover sheet attached to an existing generated document.
- You are able to select the relevant correspondence document/s to send to a client and attach these to the fax template. This is then sent as one complete fax.
- Faxes are sent in real time and initiated within 10 seconds, with an agreed number of attempts for each fax. Three attempts to connect will need to be made over a 10 minute period. If the fax fails to connect, you need to cancel it and restart another fax outbound activity. Reasons why the fax would fail to connect are usually because:
 - The line is engaged
 - The fax number is incorrect
 - The fax memory is full



In these circumstances you will need to call the fax requester and resolve the issue e.g. by confirming the fax number is correct. If the contact was generated as a result of an ad hoc activity plan line go to **step 28** to mark the item as **Not required**.

Record actions

- Once the **Fulfilment Method** has been changed to **Fulfilment House** and the **Status** shows as **Ready For Fulfilment**, record all actions taken within the **Notes** in your SR, created within [Letters \(Outbound\) - Send to Client](#). Ensure all actions within the activity plan have been completed and change the **Status** of your SR to **Closed**, this will end your process.

Emailing a third party

- Where no SR is available to create the activity, generate the following SR:
 - **Process = Manage Inbound Call**
 - **Area = General Enquiry**
 - **Sub Area = General Enquiry**



When creating the general enquiry SR, remember to assign it to the correct case.

- Select the **MVG applet** and associate the SR to the third party account.
- Create an **Email - Outbound (3rd Party)** activity and select the **Global** flag.
- Select **Template Name** to open the pick applet, this will allow you to select the appropriate email template.

25. Following selection of the template, go to the activity detail view and select **Account**. In this applet select the third party account and select the **Recipient Preference** as **Account**.
26. Select the **Create Correspondence** button. You will now be navigated to the **Outbound Correspondence** view, the **Correspondence ID** will be generated for the activity and the correspondence status updated to **In Progress**. Now select the **Generate** button.



- Where CMSL1103 is being issued by email to Cellmark record the IL rating at **Composite Email/Fax IL as 3**
- Following generation of the documents, they will be visible for review in the **Generated Documents** applet.
27. Select **Send Email** and then **Close/Complete** the SR. If the contact was generated as a result of an ad hoc activity plan line go to **step 28** to mark the item as **Not Required**.

Updating ad hoc activity

28. When the outbound activity has been generated as a result of an ad-hoc activity plan line please take the following steps to ensure that the 2012 system recognises that the activity is not applicable.
29. From within the SR that you are taking the action select the **More Info** view.
30. Run a query for Ad-hoc activities and manually update the status of the ad hoc action you have created to **Not required**.

NICMS to replace child maintenance group (CMG) for Northern Ireland.

CMSL1103 DNA Test Email

This e-mail is sent from the Maintenance Team to the approved DNA test provider to request that a DNA test for parentage is carried out

[Change - Contact Details](#)

[Outbound Contact - Client - E Mail](#)

[Letters \(Outbound\) - Send To Client](#)

[Letters \(Outbound\) - Third Parties/Forward](#)

[Pretty Good Privacy \(PGP\)](#)

[Scanning - Local](#)

[Terminology Changes](#)