

Letters (Outbound) - Send Copy

This procedure details the process to follow to issue duplicate correspondence to a client or employer when a request is made.

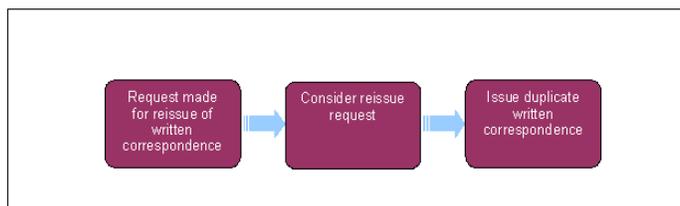
This action is performed by all caseworkers and managers within the Child Maintenance Group (CMG) upon request from a client or employer. This may be for example, if the original is lost.

Clients can request duplicate correspondence to be issued using the Child Maintenance Service's safe and secure self service website. Clients can also log on any time to check when their next payment is due, view payment history, make a payment or update information about their account. For further information, refer to [Client Self Service](#).

If a request is made for the reissue of written correspondence self service users are advised to view all correspondence via the self service portal. If the client is not a self service user or still wish to receive a duplicate copy one is sent. The letter is an exact copy of the original the client received. The decision to reissue correspondence is made by the caseworker who advises the client or employer of their decision. All copied correspondence shows on the system as a duplicate and is issued with a covering letter.

If a client requests a copy of their correspondence to be forwarded to their client representative, for example if they have instructed a solicitor and to look at the correspondence this is a different set of actions. For more information refer to [Letters \(Outbound\) - Third Parties](#).

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](#).

Request made for reissue of written correspondence

 When a request is made from an employer to re-issue the CMSL2040, this action is to be taken by the case owning caseworker and not a member of the Employer Payments Team.

1. A request to reissue correspondence previously issued may be made by telephone contact or written correspondence by letter, email or fax. Following receipt of a request from a client or employer consider the request and decide if the request is reasonable. If the correspondence is to be reissued go to **Step 2**, if not, contact the client to advise them of this and your reasons. Record your decision within the **Notes** field of the SR below and change the **Status** of the SR to **Closed**. If reissuing a letter, continue from **Step 2**. When reissuing an enclosure go to **step 20**.
2. Locate the letter on the system and create the following service request (SR):
 - **Process = Outbound Contact**
 - **Area = Reissue Correspondence**
 - **Sub Area = Reissue Correspondence**
3. Once the SR is generated change the **Status** to **In Progress** to create an activity plan to follow to carry out the request.

 Once the SR is raised complete all the required action, do not set the SR to **Pending Assignment** as the SR goes to the default segment and you cannot complete it. In this event you must raise a new SR for completion.

Issue duplicate correspondence

4.  Create a covering letter to issue with the requested correspondence. Letter template CMSL5509 is available on the system. This letter details that a request has been made for duplicate correspondence and that this is being issued. For more information refer to [Letters \(Outbound\) - Send To Client](#).
5. Select the **Letter - Outbound** link created within the **Activities**, make sure the correct recipient is highlighted and select the **Add As Recipient** button in the case contacts applet. The selected contact is added as a recipient.



6. Select the **Create Correspondence** button.



Do not select **Generate Letter**, as this prevents you from completing the following actions.

Attach correspondence to be re-issued

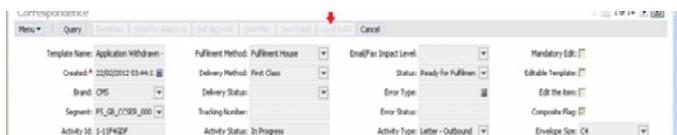
7. Select the **Attachments** tab in the **Contacts** applet then select **Re-issue Contact**.
8. To add a new item of correspondence to be re-issued select **New** in the **All Attachments** applet.
9. Then select the **MVG button** in the **Correspondence Description** within the **All Attachments** applet to produce a pop up displaying all previously issued correspondence.
10. Within the pop up select **Query** to search for the correct letter to attach or pick it from the list.
11. Highlight the one you require and select **Ok**.
12. In some scenarios you may need to send more than one letter. To do this, repeat steps 8-11.

Request team leader authorisation

13. Choose **Generate** then go to the **Correspondence Details** tab. Open the generated letter for editing and select the relevant text option. See **Customer Materials** tab for text options.
14. Select the **Send for Approval** button to send the letter for TL approval.
15. The TL checks the correspondence and the request reason to ensure the request is valid, selecting either **Approve** or **Reject** and updating the appropriate option within the SR. TL's record their actions in the **Notes** field.
16. Once TL action is complete the SR is reallocated for the next action or updates.

Complete the SR

17. On receipt of the approval task complete any action based on their decision. If the request is rejected look at the reason in the **Notes** tab. Make changes where required or to resubmit, go to **step 14**.
If the letter is not to be re-issued, contact the client to advise of this and go to **step 19** to end the process. If the letter is approved go to **step 18**.
18. The **Correspondence Status** will change to **Ready for Fulfilment**. Select **Open Generated Document** to view the letter, save PDF document locally and email along with any enclosures to the **CSA Print and Post Letters** inbox to be issued.
 If re-issuing correspondence that has failed via 2012 System, this should be sent via the [contingency process](#). Update the **Notes** field within the SR.
19. Select **Local Fulfil** which will change the letter status to **Successfully Fulfilled**. Once the email has been sent delete any locally saved copies.



20. Record all actions taken in the **Notes** field within the SR and ensure all the activity plan steps are complete. Change the **Status** of the SR to **Closed** and the **Sub-Status** to **Complete** to end the process.



For any letters that require a signature, obtain the signature and rescan the document for system issue. For more information refer to [Letters \(Outbound\) - Send To Client](#) and [Scanning - Local](#).

Reissuing enclosures

21. If a client requests new enclosures create the following SR:

- **Process = Manage Inbound Call**
- **Area = General Enquiry**
- **Sub Area = General Enquiry**

In this scenario, cancel all activities and add an ad hoc outbound letter. Letter template CMSL5512 is available on the system. When creating a new activity to issue CMSL5512 you must tick the **Global Flag** before changing the activity type to **Letter - Outbound**. For further information see [Letters \(Outbound\) - Send to Client](#).

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

22. To view the enclosures that are due to be sent with the letter select **Preview Enclosures**. Enclosures are added by highlighting the relevant enclosure and selecting **Add**. Enclosures are leaflets, fact sheets and forms that must be enclosed with the letter. Once complete go to **step 14**.

NICMS to replace CMG in Northern Ireland

CMSL5509 Important documents enclosed

Cover letter for documents that are re-issued or forwarded. Must include optional paragraph for client rep/third party and a free text area for discussion of attached docs. May be cover sheet for duplicate letter sent at client request.

Under the heading 'Important documents enclosed' select one of the following paragraphs:

- If the recipient is a client representative, select the pre-filled optional paragraph **TM_09146_E**- The enclosed document(s) relates to the child maintenance case of <free text: original recipient>, for whom you act as representative. Complete the freetext field within this optional paragraph with the original recipient.
- If the recipient is a third party, select the optional paragraph **TM_09417_E**- The attached document(s) relates to the child maintenance case of <free text: original recipient>. This is in relation to <free text: SR number/reason for sending to third party>. Complete the freetext field within this optional paragraph with the SR number / reason for sending to third party.
- If the recipient is the client, select the optional paragraph **TM_09149E**- As requested, we enclose a copy of a letter previously sent to you:

Under the same heading complete the freetext field with the description of the enclosed document(s).

Once completed review the letter to ensure the correct information is provided.

CMSL5512 Thank you for your enquiry

Free text letter template for cover letters to accompany leaflets and other literature.

Complete the freetext fields to include the:

- date of the enquiry
- titles of the leaflets/literature enclosed
- description of the leaflets/literature enclosed

Once completed review the letter to ensure the correct information is provided.

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

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

[Scanning - Local](#)

[Terminology Changes](#)