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Self Service Support Team

This procedure outlines the Self Service Support Team (SSST) caseworker role, the role of the team leader and of the IT support team.

A **video walkthrough link** available for employers and clients can be accessed and used to guide employers and clients through the self service site. To access the video walkthrough link select a link above. The video walkthroughs are web based, so after selecting, choose save, then view downloads. By selecting the down arrow next to the Open button you can then select to view with Internet Explorer, save, view downloads, open with, Internet Explorer.

The screenshot manual link's throughout the procedures will allow SSST caseworkers to view all the screenshots and help guide clients and employers through the self service site.

The self service site allows clients and employers to access their case details online and is available to all customers once they have a Scheme Identification Number (SCIN) or Employer Reference Number (ERN). A SCIN is provided at application stage and ERN when a Deduction of Earnings Order (DEO) is first set up.

When contacting the Child Maintenance Group (CMG) regarding a self service issue, clients and employers first point of contact is the caseworker or employer caseworker who 'filter' out and resolve any case based issues. Case based issues include; forgotten SCIN or ERN and queries regarding case information or DEO schedule.

Caseworker Responsibilities:

- supporting clients wanting to register/use Self Service

- managing contact from clients using the Self Service Site and assisting them with any questions

- providing support if the Self Service Site is not working, e.g. by taking a payment, or providing them with the information they wanted to check

- supporting clients if their document evidence upload fails

- caseworkers are responsible for the promotion of Self Service. Caseworkers can access the screen shots for registration on Self Service if the client has queries.

- proactively promote self-service to clients during contact e.g.

    - if a client telephones asking if a payment has been received, answer the client then advise that this can be done in future by using the self-service website

    - if a client needs to send in evidence to support a change, advise them that this can be done using the self-service website upload facility

    - if a client asks for a copy of a letter advise that the self-service website keeps a copy of system issued letters

- referring technical incidents/site feedback/government gateway issues to the Self Service Support Team via a warm telephone transfer

Caseworkers must only refer the above relevant issues to the Self Service Support Team. Caseworkers must always see if they can answer the client by checking instructions first before transferring any calls to the Self Service Support Team(SSST).

For more information refer to Client Self Service or Employer Self Service.

The SSST is made up of trained specialists from the General Inbound Call Handling team (GICH). They are a client and employer facing team who assist clients and employers with self service issues including:

- Government Gateway (GG) registration and set up issues

- Child Maintenance Service enrolment within Government Gateway

- Login problems - this may be forgotten Government Gateway ID and password or more technical problems

- Navigation in the self service site including - accessing screens, inability to load DEO schedules, inability to make a payment

- Data mismatch - details on the self service site different to those held on the 2012 system

- Collation of management information and feedback on the Self Service site

The SSST access a Government Gateway helpdesk icon via a link saved to their desktop. The helpdesk icon allows the SSST caseworker to check whether the client or employer is temporarily 'locked out' of the self service site and to delete accounts. The functions of the icon are discussed at length in the details section.
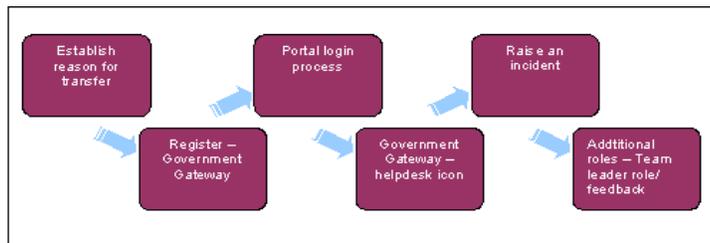
(i) This procedure uses the terms receiving parent and paying parent.

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.

Information Points

Information Points

(i) The screenshot manual link is available to provide caseworkers with a window to the client and employer self service and assist clients to navigate the screens they are viewing.

(i) To access the self service website, clients and employers and Northern Ireland clients can enter one of the following applicable website addresses:

childmaintenanceservice.direct.gov.uk/client

childmaintenanceservice.direct.gov.uk/employer

childmaintenanceservice.direct.gov.uk/ni

(i) A Government Gateway (GG) helpdesk link is available on your desktop. A Government Gateway ID and password is issued by the IT support team and should be recorded for future use. Do not disclose your password to anyone.

(i) After 30 minutes of inactivity Self Service Support Team (SSST) caseworkers are automatically logged out of the Government Gateway helpdesk.

(i) Please find link for Self Service Error Codes

Establish reason for transfer

Establish reason for transfer

Receiving the call from the caseworker

1. 📞 After receiving a call, talk to the caseworker to find out what the query is. Confirm all case based issues are resolved and that they have checked the self service user has their known facts before accepting the warm transfer. Identify which of the following the query is about:

   ■ Government Gateway registration problems - including forgotten ID and password

   ■ Child Maintenance Service enrolment problems - confirm caseworkers have checked that clients and employers have entered the correct known facts

- Log in problems - confirm caseworkers have checked that clients have entered the correct security PIN and employers have entered the correct employer reference number (see step 23)

- Problems navigating screens - including accessing screens, inability to load deduction of earnings order (DEO) schedules

- Data mismatch - details on the self service site are different to those on the 2012 system

Self service users are identified by a set of information called known facts. This is information that the Child Maintenance Group (CMG) know about them such as a postcode or date of birth. To enrol for the self service site clients and employers must know their known facts.

After receiving contact via letter or web message, view the detail and contact the self service user.

Speaking to the client

2. Talk to the self service user, check what section of the self service site they are in:

- which screen they are viewing

- what the problem is

- is there a screen message

- what they want to achieve

- talk them through each screen to enable them to complete what they want to achieve e.g. view statement, confirm DEO schedule (use the screenshot manual link for guidance)

Each item on the history trail (shown at the top of each screen) is a hyperlink, self service users can select any of the items on the history trail to navigate back to that screen.

3. Advise self service users that there is a help link on every page. Select this to browse the help topics or type in a specific question to view step by step guidance.

4. Advise self service users the main headings displayed on the homepages are hyperlinks. These headings are shown in separate boxes and have further relevant sub-headings. Direct clients and employers to the relevant page by following the links, for example:

- My payments>make a payment>check payments>see your payment history

- My schedules>edit payment schedule>upload a schedule>view schedule history

If following resolution of the self service query, the client or employer raises a further case based query warm transfer the call back to the relevant case owner. For more information refer to Call - Transfer

5. If unable to resolve the query refer to the section further down the page raise an incident.

Error messages

6. After receiving a warm transfer call regarding an error message Something's gone wrong! on the screen; Confirm the caseworker has:

- Asked the user to try to log in again

- Asked the user to note the error code and transaction ID (where displayed)

7. There may be a fault with dependant components such as BaNCS, Siebel or WPS. If unable to resolve the problem ask the user for their contact details, agree a call-back time and advise them you will investigate the issue and get back to them.

8. If self service site maintenance message is displayed at the top of the screen (in red) advise users that the site is not available for a specified period of time. Users can continue to log in and use the service (except during the time shown).

9. The following message will appear if the self service site is down or has been manually shut down for maintenance:
Sorry the site is unavailable at the moment because it's undergoing urgent maintenance. We should have it up and running again soon, so please try again later.

Advise users they cannot use the self service site but everything is being done to correct the problem as quickly as possible.

Government Gateway registration

Government Gateway registration

Refer to the screenshot manual link for Government Gateway registration guidance

1. To register for the Government Gateway, self service users select this option on the relevant Child Maintenance Service (CMS) website:

   childmaintenanceservice.direct.gov.uk/client

   childmaintenanceservice.direct.gov.uk/employer

   childmaintenanceservice.direct.gov.uk/ni

2. Government Gateway registration is complete once the 12 digit ID number is displayed. Advise self service users the ID and password must be recorded as it is needed to access the self service site. Please see below screenshot which is displayed when registering for Government Gateway.

3. For more information on registering for Government Gateway please see Self Service Overview or registration information on Client / Employer self service.

Enrol for Child Maintenance Service

Enrol for Child Maintenance Service

(i) Refer to the screenshot manual link - enrolment for guidance with enrolling for the Child Maintenance Service.

1. First time self service users select enrol to complete CMG security and enrolment, existing self service users select **login**. Enrolment is only completed once.

2. To access the self service site self service users must select **enrol** which is detailed on the screenshot below. Clients will need their Scheme Customer Identification Number (SCIN) and employers will need their Employer Reference Number (ERN). Advise employers that the ERN is shown on all notifications issued to them and is created when they first set up a DEO. Clients receive the SCIN when they first apply to CMS.

3. Self service users will continue enrolment by selecting **Child Maintenance Service** from the list displayed below.

4. An information page requests self service users should enter their known facts. Advise clients and employers their known facts have previously been recorded in the system and are used for security purposes.

5. Clients will enter their SCIN, National Insurance Number (NINO), date of birth and name and select **next**.

6. Employers must enter their ERN and PAYE number and select **next**. Once confirmed as accurate, the portal homepage is displayed.

Self Service login - security details

Self Service log in - security details

Refer to the screenshot manual link for guidance with logging in to the self service site.

1. If self service users have previously registered and enrolled they will have a GG ID and password and should select **login**.

2. The initial login screen is displayed. Self service users will enter the Government Gateway ID and password and select **login** every time they enter the self service site.

Forgotten Government Gateway ID or Password (not both)

3. For forgotten Government Gateway ID or password (not both) advise self service users to:

   - return to the log in page

   - select **login**

   - select the relevant link; **Forgotten your User ID?** or, **Forgotten your password?** (See screenshot above)

4. The ID/password is automatically reset with half appearing on the screen and the other half sent to their email address.

   ⚠️ Three unsuccessful attempts in one hour results in a lockout for two hours.

5. To continue with login, employers are requested to enter their ERN and clients are asked to enter two random digits from their PIN (see screenshot below).

   ℹ️ The PIN is a seven digit security number given to clients (not employers) when they apply for CMS. Employers with more than one ERN should enter the relevant ERN they want to use in the current session.

6. If self service users are having problems with login, confirm they have the correct PIN/ERN. If they haven't got the PIN/ERN, warm transfer the call back to the case owner as this is a case based issue.

7. If clients make three incorrect attempts to enter their PIN, a new screen prompts them to enter three security questions previously held in the system from CMS application stage. If clients answer the questions correctly they enter a new seven digit PIN, if the answers are incorrect, the account becomes locked and a message advises them to contact CMS.

Employers accounts will not be locked, if they enter an incorrect ERN they will be prompted to re-enter it. Advise employers the ERN is shown on all notifications and documents received from CMS.

Forgotten ID and password - Government Gateway helpdesk icon

Forgotten ID and password - Government Gateway helpdesk icon

Delete self service user

Refer to the screenshot manual link for guidance with de-enrol account from Government Gateway.

1. If the self service user has forgotten their Government Gateway ID and password follow the steps below to delete their Government Gateway account. Advise self service users this will only take a few moments and they will then be able to re-register.

2. Open the Government Gateway helpdesk icon saved on your desktop, enter your unique user ID and password and select log in detailed in the screenshot below.

Do not disclose your password to anyone. After 30 minutes of inactivity Self Service Support Team caseworkers are automatically logged out of the helpdesk.

3. The main menu screen is displayed below. Select Customer selection and Known facts from the dropdown menu.
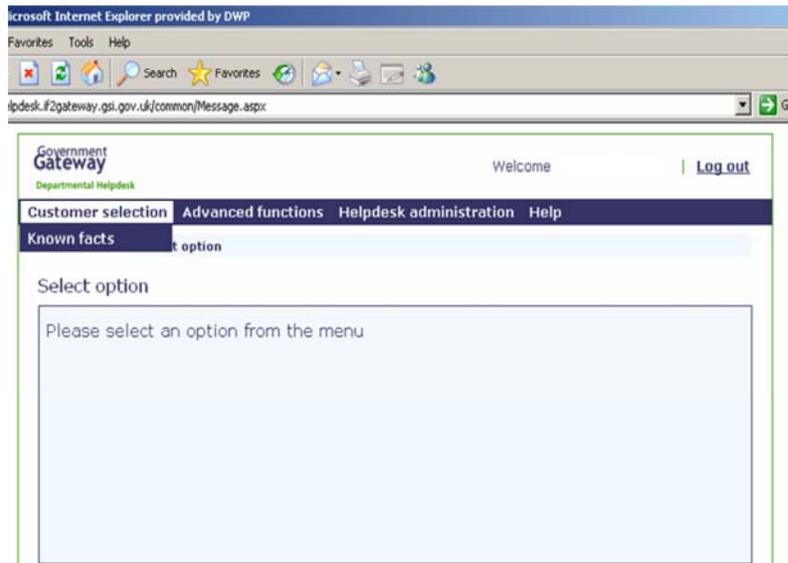
4. The Customer selection screen is displayed below. Select Child Maintenance Service (or Child Maintenance Service - Employer) from the dropdown menu.
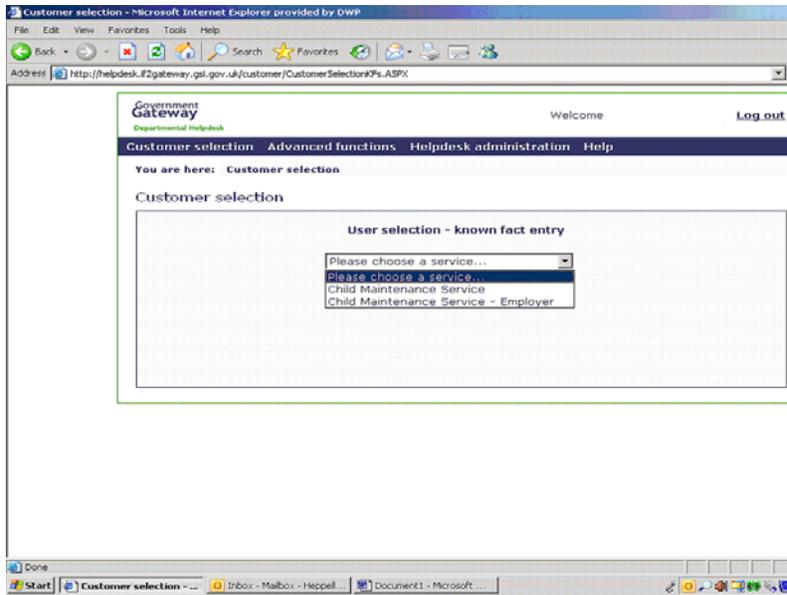
Known Facts

5. Ask the self service user to provide their known facts and record these in the relevant fields (see screenshot below).

6. Client known facts are the SCIN, NINO and date of birth which must be entered in the following format, DD/MM/YYYY.

7. Employer known facts are the ERN and PAYE.
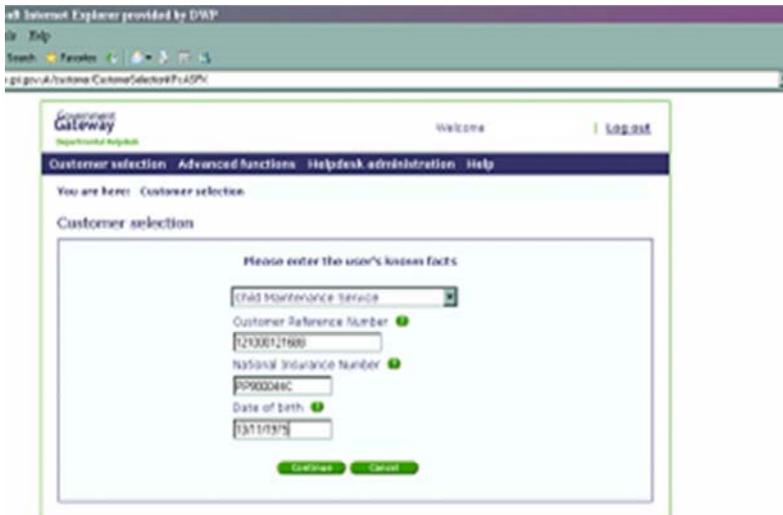
8. The known facts entered are validated with the Child Maintenance system, shown in the screenshot below.

   ⓘ If the self service user cannot provide their known facts advise them to call back with the details and end the call. Self service users should be advised when calling back they will speak to the case owner before being transferred to the SSST.
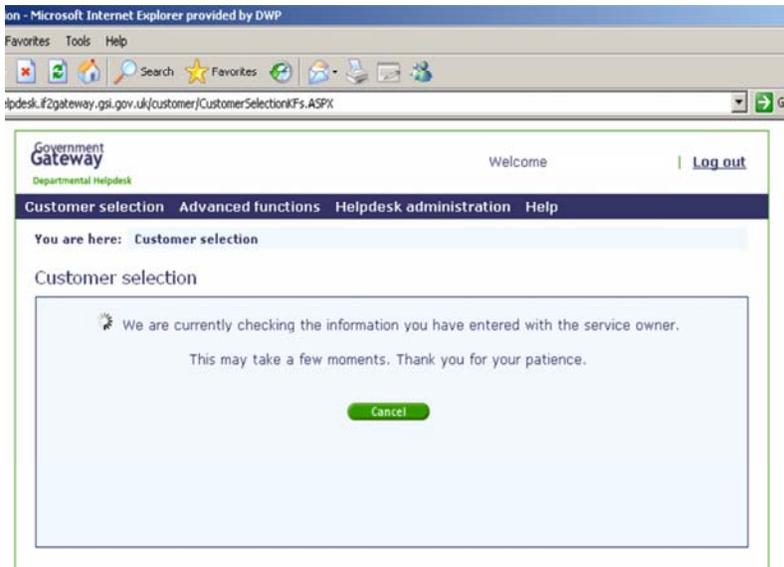
If an error message occurs (showing the details entered cannot be validated) advise the self service user to confirm their known facts, re-enter these where applicable or ask them to call back with the correct details.

Known facts validated - customer details screen

9. Once the known facts are validated the customer details screen is displayed (shown below). This screen contains information directly related to the customer e.g. last login, locked out status.

The resend user ID and reset password buttons are disabled.
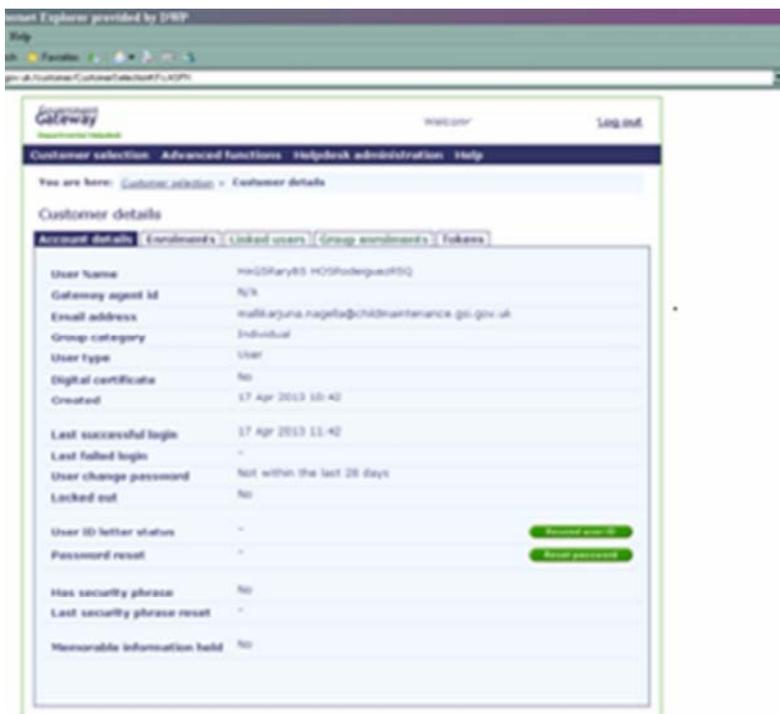
10. The locked out status indicates whether the self service user is currently locked out. If locked out, advise the self service user they will not be able to log in until two hours after the last failed login.

De-enrol client from CMS and Government Gateway

11. Select the **Enrolments** tab (highlighted on the screenshot) and **Child Maintenance Service** link or **Child Maintenance Service - Employer** link
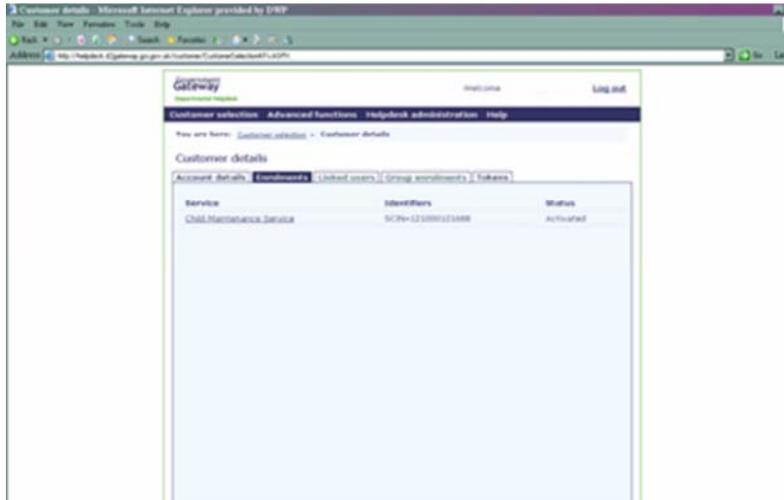
12. A new Service details screen is displayed below. Select the **De-enrol user** button.

⚠ Advise self service users this de-enrols them from all Government services they've previously enrolled in.
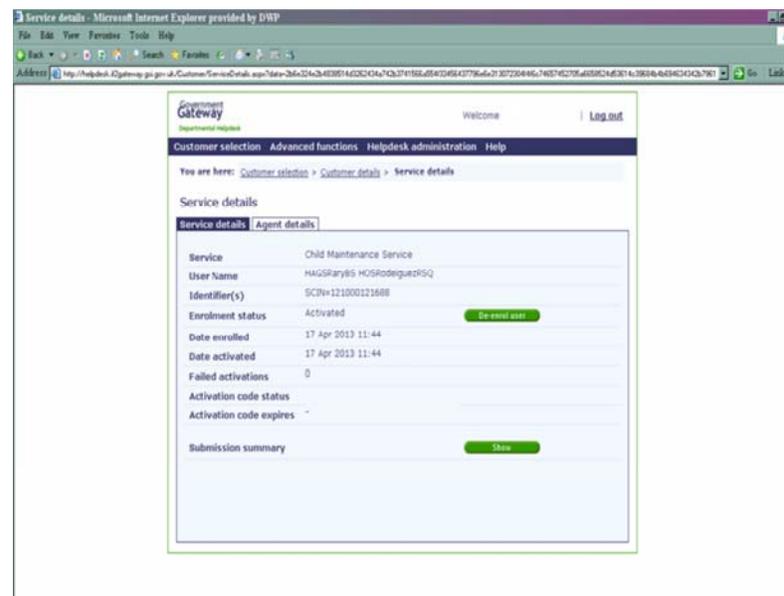
13. A new de-enrol service screen is displayed, select ok to confirm you wish to de-enrol self service users from the Child Maintenance Service.

14. Advise self service users their details are successfully deleted and that they may re-register with the Government Gateway immediately. Follow from step 10 for guidance in registering with the Government Gateway.

Raise an Incident

Raise an incident

1. If further technical assistance is needed, take note of as much information as possible, including any error codes the client is experiencing and raise an incident using Tech Now. Error codes begin with the letters ECMP followed by at least three digits e.g. ECMP101.

   For more information refer to Incident Management - Manage Incident Locally.

   Inform the self service user that an incident has been raised and give an estimated timescale of seven days for resolution.

2. Advise the self service user you will contact them when the issue is resolved. Set a seven day reminder on your outlook calendar.

3. Monitor the email in-box for resolution of the issue.

4. Contact the local IT Team if not resolved within seven days to find out the reason for the delay and contact the self service user to update.

5. Call the self service user to advise the error is resolved and that they can access the self service site. Talk them through the issue, confirm they understand the information and can access the self service site successfully.

Additional roles

Additional roles

Collate feedback/management information data

The SSST record feedback relating to the self service site provided by self service users. This is used to inform future changes to the service.

1. Feedback is received by:
   - telephone (recorded and copied onto email)
2. Record the feedback using the feedback template. The template has a series of self explanatory freetext boxes and dropdown menus to select from.
3. The template has two sections, one for SSST caseworkers and one for the team leader. The team leader will collate the team data on a weekly basis and set up a new template for the SSST caseworkers.
4. Team leader copies are collated on a monthly basis, this data is then transferred at the end of the month to the master spread sheet and a new template is started.

IT support team functions

5. Open and log on to the Government Gateway helpdesk link and enter your User ID and password.

   Once logged on, a designated IT support colleague can select the **Help** tab to view further information on the available functions.

6. Select the Create user tab:

   - Enter the first name and surname of the SSST caseworker
   - check the tick box to select the function you want the SSST caseworker to perform e.g. de-enrol user, change password
   - select **ok**

   A confirmation screen is displayed showing the unique user ID and password. Note these and pass to the caseworker.

   The password is created by the system however when logging on for the first time the caseworker is presented with a new password. This ensures the password is only known to them.

   The ID is created by the system as follows - the first letter of the first name and the first five letters of the surname followed by a number.

7. Select the **View user list** tab. The following actions can be performed:

- **Edit**

- **Delete**

- **Change password** (see sub section below)

- **unlock account** - an account will become locked when logging in five times with an incorrect password (unlocking the account does not change the password)

(i) From the view user list tab the IT support team can view a list of all caseworkers. The advantage of using the view user list function is there is no need to type in the user ID and it offers an additional function - unlock.

8. Select the **View user list** tab:

   - Select the unlock hyperlink

   - Select the SSST caseworker account to be unlocked

   - Confirm the unlock change when prompted

9. Select the **Delete a user** tab:

   - Enter the ID of the SSST caseworker to be removed

   - Select ok

   - Confirm the deletion when prompted and select ok

   A confirmation screen is displayed.
10. Select the change **password** tab:

    - Enter the user ID of the SSST caseworker for password change and select **ok**

    - Confirm the password change when prompted and select **ok**

    - A change password confirmation screen is displayed showing the new password

    - Select **ok**, make a note of the password and pass to the caseworker

(i) This function can be used when a caseworker forgets their password. When the caseworker logs in for the first time the application will automatically re-issue a new password on screen.

11. Select the **Change my password** tab, enter the current password and select **ok**. A new password is created and displayed on the screen.

(i) This function allows the IT support team to change their password. As passwords are eight random characters and numbers they can be difficult to remember, passwords should only be changed in the event that someone else knows your password.

Clients and employer in Northern Ireland should enter the website address: **childmaintenanceservice.direct.gov.uk/ni**

Terminology Changes

Call - Overview

Deduction of earnings order (DEO) schedules

DEO schedule file format

Client Self Service

Employer Self Service

Incident Management - Manage Incident Locally

Self service overview

Screenshot manual link - clients and employers

Screenshot manual link - registration

Screenshot manual link - enrolment

Screenshot manual link - login

Screenshot manual link - de-enrol

Video walkthrough

Client

Edit this page to modify your web part content.

Why can't the client view their letters on the Self Service Site?

For clients to view letters on the Self Service website they must download Adobe Acrobat Reader as the letters are in PDF format software must be downloaded to view the attachments.

It is quite prominent on the Messages section of the Self Service website that the client must download this software to view their let client still cannot read their letters once Adobe Acrobat Reader is downloaded an incident must be raised.

When the Self Service Support Team de-enrols a client is this from Child Maintenance Service only?

No. When a client is de-enrolled this is from Government Gateway and the Child Maintenance Service

How does the client log on to the Government Gateway?

To register for the Government Gateway, Self Service users select this option on the Child Maintenance Service (CMS) **childmaintenanceservice.direct.gov.uk** then select register if you're a new user.

How does the client log into the CMS Self Service Site?

First the user must register for a Government Gateway (GG) account on **childmaintenanceservice.direct.gov.uk** then on the GG w for Child Maintenance Service.

If the user already has a GG account but hasn't enrolled for CMS, select Enrol now which is included in Register -if you're a new u displayed on the Self Service homepage.

If the user has registered for a GG account and enrolled in CMS they select Log in -if you're an existing user.

Why can't self employed clients enrol for CMS as a client even though they are registered with the Government Gateway?

Self Employed clients have to register with the GG twice, for both CMG services (client & employer). They cannot use their client Gateway registration to then log in as an employer. For example they will need two 12 digit GG IDs and two passwords.

The client has lost their Government Gateway password how do they log in to the Self Service Site?

The user will need to access childmaintenanceservice.direct.gov.uk/client then select Log In on the home page then forgotten passw will then be displayed which requests the user ID, email address, customer reference number (SCIN), NINO, and date of birth.

The ID/password is automatically reset with half appearing on the screen and the other half sent to the users email address.

The client has blocked their access to the Self Service Site what should they do?

On the Government Gateway - three unsuccessful logs in attempts in one hour will result in a lockout for two hours. The Self ser team can deal enrol a customer from the Government Gateway and CMS Self Service Site at this stage to allow the client to re-regis can wait for two hours.

If the security has been entered 3 times incorrectly the account will be blocked. The user should contact CMS and the relevant action to re-set the security.

Why hasn't the client received an update on their case via the Self Service Site after submitting a message?

All messages on the Self Service Site will be responded to within 48 hours by telephone. If the telephone calls are unsuccessful a l issued to the user which provides an update.

If the client has Self Service as their preferred method of contact the letter will be displayed in their Self Service account.

Employer

Edit this page to modify your web part content.

Why can't the employer log into the Self Service Site when they have registered with Government Gateway and enrolled for Child Main

The employer must follow the key steps to register for Self Service:

Navigate to **childmaintenanceservice.direct.gov.uk/employer**

Click to register with the Government Gateway (GG)

Enrol in Child Maintenance.

An incident was raised when an employer attempted to register for GG before accessing Child Maintenance Se
link directed the employer to the client Self Service Site. The link has now been fixed but employers should be advised to always ac
website through **childmaintenanceservice.direct.gov.uk/employer** when registering for Child Maintenance Service.

Why is the employer having problems logging onto the Government Gateway?

You need to ensure that the employer has entered the correct ERN .

Employer accounts will not be locked, if they enter an incorrect ERN they will be prompted to re-enter it. Advise the employer the ERN
all notifications and documents received from CMS.

Employers with more than one ERN should enter the relevant ERN they want to use in the current session.

If an employer has more than one PAYE reference number (these are allocated by HMRC to support income tax returns) then the CMS
treat each PAYE number as a separate employer. Therefore unfortunately an employer with several different companies with dif
reference numbers would need a separate government gateway ID and password for each one to be able to view all self-service accoun

The employer has lost their Government Gateway password how do they get it changed?

The employer selects forgotten password on the log in screen then enters user ID, email address, ERN, PAYE. The password is automa
with half displayed on the screen and half sent in an email.

How does the employer make a payment on the Self Service Site?

Log onto the Self Service Site and select My Payments-make a payment.

Can the employer receive updates from the Self Service Site by e-mail?

The client can choose the option to select Self Service as their preferred method of contact and they will be sent a notification when a
in their Self Service account.

Why can't the employer access the My Schedules tab?

The employer can only access the My Schedules tab when there is a schedule available to view. If there are no schedules previously
page cannot be displayed.