Personalised Services (CS) 277-09070000

Background

This document outlines the processes used by Team Leaders and Case Managers in Personalised Services (PS) to manage and support customers with complex issues and assist them to meet their child support responsibilities.

On this Page:

Overview

The Personalised Services objectives are to:

- improve the collection of child support and reduce debt by assisting escalating customers to resolve their issues and increase their understanding and acceptance of the child support scheme and meet their obligations
- correct Child Support errors and support customers through crisis, enabling them to return to greater self-management of their child support matters
- improve the operation of the Child Support Scheme by taking a collaborative approach to complex case management within the department and with referral agencies and by addressing systemic service issues
- manage persistent complainants and restrict any negative impacts on the business and on customer and stakeholder confidence in Child Support

Service delivery to Personalised Services customers is provided through:

- a single point of contact so the customer does not have to deal with a range of people to resolve their issues
- face-to-face contact with customers when required
- a collaborative approach with other areas of Child Support to resolve customer issues
- delivery of tailored services to customers
- a high level of accountability for delivering customer outcomes
- the development of a Personalised Services Plan for every customer
- a team based approach that maximises the potential for solutions and options for the customer
- referrals to social workers
- referrals to community support organisations

Roles and responsibilities

Personalised Services Team Leader

Personalised Services Team Leaders support and lead Personalised Service Case Managers to enable customers with complex and/or escalated issues to return to greater self-management of their child support matters.

Specialist Officer

A Specialist Officer is a case officer working in a specialist area such as Change of Assessment, General Objections, Part 6A Objections, Compensation, Privacy team, Litigation, Freedom of Information and Complaints.

The Specialist Officer will:

- liaise with the PS case manager while in contact with a PS customer
- advise the PS case manager of any changes that may impact the PS customer

Personalised Services Case Managers

Personalised Services Case Managers are required to gather information from customers about five mandatory issues.

Personalised Services Case Managers work with customers to reduce outstanding child support and improve ongoing compliance by:

- managing and resolving customer issues, enabling them to return to greater self-management of their child support matters
- taking a collaborative approach to complex case management with other areas of the business and external referral agencies
- educating customers about the child support scheme and the requirement to meet their child support obligations

The Personalised Services Case Managers will:

- determine and document any outstanding issues on the case, e.g. privacy breaches, compensation claims, complaints, FOI, escalations or third party involvement
- determine and document any special customer contact conditions such as restricted service and discuss the communication approach between the department and the customer
- facilitate the provision of applications, forms, phone conferences, or other information required by the business process
- discuss the decision, and implications with the specialised decision maker, before agreeing on an approach to communicate to the customer

Note: where there is a need for a specialised activity, the specialist decision maker must contact the PS Case Manager to consult on the case prior to taking any action. This does not replace the authority or delegation of the specialist decision maker.

Authorisations and delegations

For more information about authorisations and delegations see Child Support Services, Delegations and Authorisations.

Related links

Blueprint documents

Change in child support care levels (post 1 July 2010)

Complaints handling (CS)

Contact with Child Support customers

Customer aggression and unreasonable customer conduct (CS)

Debt repayments (CS)

Deceased Child Support customer management

Documenting Child Support information in Cuba

Family Violence and Child Support customers

Income processing for Child Support customers

Letters for Child Support customers

Payment options for child support

Restricted service customer options (CS)

Service referrals for child support customers

Process Helps

Documentation Cuba Process Help

Intray management Cuba Process Help

Letters Cuba Process Help

Personalised Services Cuba Process Help

Sensitive issue management Cuba Process Help

Transfer or lock a customer Cuba Process Help

Window Helps

Client Profile Window Help

Customer Management Plan Overview Window Help

PS CSO Actions List Window Help

PS Service Manager Actions List Window Help

PS Service Manager Work Assignment Window Help

Team Structures Window Help

Process Summary

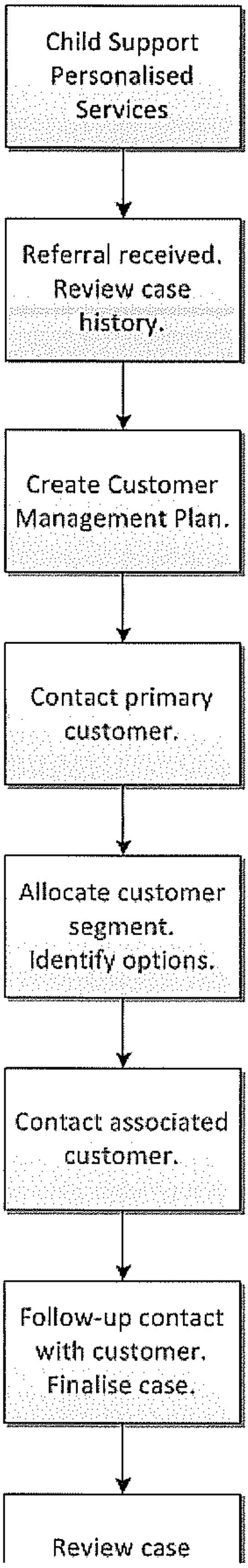
This page contains a summary of the processes used by Team Leaders and Case Managers in Personalised Services (PS) to manage and support customers with complex issues and assist them to meet their child support responsibilities.

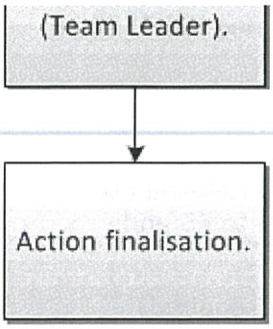
Flowchart

Personalised Services

This image provides a summary of the processes used by Team Leaders and Case Managers in Personalised Services (PS) to manage and support customers with complex issues and assist them to meet their child support responsibilities.

Note: a text based version of this process is located <u>here</u>.





Process

This page contains information regarding the processes used by officers in Personalised Services to manage and support customers with complex issues and assist them to meet their child support responsibilities.

On this Page:

Referral to Personalised Services

Actioning a referral to Personalised Services

Review case history

Create a Personalised Services record

Customer contact for Personalised Services

Customer contact- Face to face

Resolve customer issues

Managing cases involving specialist decision makers

Refer to Team Leader for finalisation

Refer to Team Leader for finalisation

Ongoing reactive management

Referral to Personalised Services

Actioning a referral to Personalised Services

This table describes the processes used by Personalised Services Case Managers when a referral is received.

Step	Action
1	**Referral received** + Read more ... Customers are referred to Personalised Services(PS) Case Manager via intrays**:** • CRG Referral to PS • PS Referral (TL only) • Complaints referral to PS • Customer Assigned to PS

	Note: urgent referrals to PS must be made by a Team Leader contacting the PS Team Leader prior to referring a customer.
2	**Action in-tray** + Read more ... Within two working days of receiving the CRG referral to PS or the PS Referral (TL only) intrays or within seven working days for the Complaints referral to PS and Customer assigned to PS intrays: • lock and assign the primary customer and associated customer (if required) • reallocate customers as necessary (including associates or non-customer assigned to PS intrays) • review case history. See Review Case History • create a Personalised Services Plan (PSP) for the customers. See Create a Personalised Services record • create a stacking document with 'PS referral document' as the first notepad in the stacking document • complete the 'PS Case Review' document in PS Stacking document • contact the primary customer • update the PSP with the stacking document location and customer segment, including where the referral came from and the main referral reason • contact the associated customer (if required). See Customer contact for Personalised Services
3	**Create record in the PS Activity Database** + Read more ... Create a customer record in the PS Activity Database. This is the recording, workload management and reporting tool used by PS Case Managers and PS Team Leaders.

Review case history

Reviewing and reallocating the customer

This table describes the processes used by Personalised Services Case Managers and Team Leaders to review and allocate a customer.

Step	Action
1	**Review case history** + Read more ... Review the case details including: • case and customer windows • notepads and communication windows • checking the Feedback and Review window for escalations • the Customer History Report **Note:** if the customer referral was received from the Customer Referral Gateway (CRG) via a CRG Referral to PS intray, review the 'CRG Record' notepad in the Communication window. Use the research to identify available options for the customer and assist with discussions.
2	**Reallocate customer (Case Manager)** + Read more ...

	Discuss with the Personalised Services (PS) Team Leader any reasons the customer should be reallocated to another PS Case Manager, including but not limited to: • a conflict of interest • customer resides in another state and has requested face-to-face contact. See Customer contact for Personalised Services • customer resides overseas and the issues are governed by the jurisdiction rules of that country, for example court order, child support agreement or collection opportunities • If the customer is to be reallocated send an email titled Reallocation request to the team leader Use the Personalised Services macro to record the case review under the stacking document.
3	**Reallocate customer (Personalised Services Team Leader)** + Read more ... When an email is received titled Reallocation request discuss the reasons for reallocation with the PS Case Manager then: • contact the receiving PS Team Leader to discuss the reasons for reallocating the customer • reallocate the customer The receiving Team Leader assigns and locks the customer to a PS Case Manager. A Customer Assigned to PS intray will generate for the customer.

Create a Personalised Services record

Create a Personalised Services Plan

This table describes the processes used by Personalised Services Case Managers to create a Personalised Services Plan.

Step	Action
1	**Create Personalised Services Plan** + Read more ... Create a Personalised Services Plan (PSP) and record the mandatory issues. See Documentation and mandatory issues. If the customer has been reallocated from another PS Case Manager update the existing PSP. The PSP must be completed within 21 days.
2	**Record information in the Personalised Services Plan** + Read more ... Information about the following should be recorded in the PSP: • date the Personalised Services(PS) stacking document was created • source of the referral e.g. Ombudsman, Step 3 Complaint or Ministerial/Departmental response • customer segment • the main issue presented, and why the customer was referred • five mandatory issues (income / care / contact details / CS arrears / CS ongoing)

	• Issues from customer perspective • options provided to the customer • agreed actions • agreed contact times • special contact details if the customer has contact restrictions imposed by the Department. See the Customer Management Plan Overview window help.
3	**Approve the Personalised Services Plan** + Read more ... PS Case Managers are required to approve the PSP once it has been completed.
4	**Update issue status in the Personalised Services Plan** + Read more ... Record and update the status of each customer issue, including the mandatory issues. For example, when the customer is first allocated enter the mandatory issues in the Issue Details dialogue box in the Customer Management Plan Overview window with the issue status 'recorded'. After contacting and discussing the mandatory issues with the customer update the issue status to 'confirmed'.

Customer contact for Personalised Services

Contacting Customers

This table describes the processes used by Personalised Services Case Managers to contact customers.

Step	Action
1	**Contact primary customer** + Read more ... Contact the primary customer use the discussion points in step 2 and tailor the conversation to the customer's individual circumstances. If a customer has contact restrictions imposed by the department, see Restricted service for a Child Support customer and check the Personalised Services (PS) stacking document in the Communications window before making contact. If you are not sure how to proceed discuss with the PS Team Leader. If the customer requires face to face contact go to Customer contact face to face. Use the Personalised Services macro to record the call. If the referral relates to the customer contacting a Member of Parliament or the Ombudsman determine if any further contact with the customer is required. If no further contact is required contact the Customer Review Officer to confirm the customer's issues have been resolved and no further contact is required go to Finalising a case- submission and review.
2	**Discussion points** + Read more ... Discuss the following with the customer:

- complete the normal introduction and explain you are calling to follow up on issues raised by them (when contacting the primary customer) or the other parent (when contacting the associated customer)
- confirm the customer's issues, including any new issues not previously raised
- offer to warm transfer them to Parent Support Services if they may be at risk of self-harm or harm to others. See Service referrals for child support customers
- offer a social worker or contact details for any other community service provider that may be of assistance
- if they advise their privacy has been breached, see the Privacy intranet page
- explain your role is to work with the customer and to be the single point of contact until the child support issues raised have been resolved through a case review approach
- your commitment to undertake agreed actions and provide progress updates
- their return to self-management once the issues have been resolved
- some issues may not be able to be resolved by the department and provide the customer with information about and referrals to other services
- set clear expectations about the role of the Personalised Services case manager and the customer's responsibilities
- gather information about the following mandatory issues:
  - income correct – check the most relevant income is being used in all assessments, if not update the income details
  - care correct – clarify the recorded care arrangements are accurate
  - customer contact details – confirm the customer's preferred contact number/s and contact times
  - payment activity for ongoing liability – discuss payment options and gather information to assist ongoing collection activities
  - payment activity for arrears – discuss the requirement to make a payment arrangement, gather information to progress collection activities and ask whether the payer has made direct payments to the payee for child support
- manage the customer's expectations about payment or collection of ongoing and outstanding child support
- explain their options or confirm a time to contact them again with options to address their issues
- confirm any customer representative information
- after discussion with a Team Leader, consider face-to-face contact if there are benefits in resolving issues in this way
- if the customer wants to make a complaint, see Complaints Handling (CS)
- confirm any request for written confirmation of the issues or copies of Child Support correspondence; confirm the customer's preferred contact number/s and contact times
- provide the customer with the department's enquiry line on 131 272 and advise them to enter their reference number to be directly transferred to their Case Managers
- provide details about when you are available
- at the end of the call summarise the key points and ask the customer to acknowledge:
  - the issues that have been identified
  - your commitment to provide options to address their child support issues and the referral options available to them
  - a suitable time to contact them again for further discussion and progress of the issues

	Staff must not remove their headset prior to ending a phone call, see Contact with Child Support customers- Terminating phone calls.
3	**Post customer contact** + Read more ... After contacting the customer: • update and approve the Customer Management Plan • update the Personalised Services (PS) stacking document. See Documentation and mandatory issues • record the products and services provided to the customer • add a sensitive issue indicator if required • create a follow up intray and delete the referral intray • update special contact details in the Client Profile window if there has been a security incident • write to the customer or send copies of Child Support correspondence if required • speak to your PS Team Leader if face-to-face contact is required
4	**Add sensitive issue indicator** + Read more ... Add a sensitive issue indicator if required - see the Client Profile window help. See the following for information about when this may be appropriate: • Family violence and Child Support customers • Restricted service for a Child Support customer • Deceased Child Support customer management • Security incident reporting Document the reasons for the indicator in the Client Profile window including any specific conditions. The Sensitive Issue Indicator is an internal customer management tool. Do not advise the customer about the indicator.
5	**Create follow up intray** + Read more ... After identifying the customer's child support issues: • create an intray for follow-up action, for example Client Call-back, Estimate Review Required, General Follow-up • delete the Customer Assigned to PS or CRG Referral to PS intray See Intray Management Cuba process help.
6	**Customer contact – follow-up** + Read more ... After initial contact with the customer, contact them again as arranged to: • discuss new or further information that has been identified as a result of further case review • provide their options • confirm their understanding of the next step • gain or provide commitment to take action within a specified timeframe See Contact with Child Support customers.

	Note: if a referral to a social worker is being considered discuss this with the PS Team Leader. Several follow up contacts may be required before the customer decides whether to take up their options. Go to Step 7 for details of issues that may need to be discussed with customer.
7	**Customer contact – follow-up discussion points** + Read more ... If follow up contact is required, discuss with the customer: • any issues from the discussion points that were not covered • their input to the development of the PSP • all options available to them • child support legislation and the decision making process • how they will be case managed throughout any specialist process • decisions that affect the child support case will involve input from both customers • the time it may take to undertake some options • if the customer's options include referral to an external organisation: ◦ offer to warm transfer them at the end of the call ◦ provide the contact details and ask them to contact the external organisation within a specified timeframe ◦ request they meet the requirements of the external organisation, such as attending appointments ◦ ask them to contact the department to discuss the outcome where appropriate • if the customer options include referral to a specialist area: ◦ offer to warm transfer them at the end of the call or conference call with the specialist officer ◦ explain options for case management throughout the specialist process, see the Personalised Services Mandate • at the end of the call: ◦ agree on the issues to be addressed ◦ acknowledge the actions to be undertaken ◦ commit to taking the agreed actions within a specified timeframe ◦ confirm the appointment date and time for contacting the customer back by telephone to discuss the progress of your investigation ◦ provide written confirmation if required. Go to Step 8 for more information ◦ update the Personalised Services Plan if required
8	**Writing to customers** + Read more ... When preparing a unique letter or generating system letters for a customer, go to: • Letters for Child Support customers • Letters List Window Help • UQ140.00 - Personalised Services Management Introduction Letter • UQ140.01 - Personalised Services Confirmation of first call letter • UQ140.02 - Personalised Services Exit Letter

	Note: PS unique letters are signed off by the PS Case Manager rather than on behalf of the General Manager.

Customer contact- Face to face

Face to face contact

This table describes the processes used by Personalised Services Case Managers to facilitate face to face contact with customers.

Step	Action
1	**Face-to-face contact** + Read more ... Face-to-face contact with a customer is a powerful tool to resolve issues when previous management strategies have been unsuccessful. Discussing their issues in person is an option, and if appropriate, Personalised Services Case Managers should consider if the customer would benefit from face-to-face contact. For example, ask the customer to attend a meeting when the issues are complex, or there is a communication barrier and they are more likely to have their issue resolved by discussing with them in person. **Note**: please discuss with the PS Team Leader prior to making the face to face appointment. A face–to-face meeting: • provides customers with a 'human face' for the department • helps customers to engage with the department in a meaningful way • may provide an opportunity to resolve long term issues when phone or written contact has not been successful • sends a clear message that the department are willing to invest in understanding and resolving customer issues • may be an option for a person experiencing or identified as demonstrating a communication barrier
2	**Preparing for the meeting** + Read more ... When the customer has agreed to meet or requests to meet with the department: • establish the location for the meeting • decide who will meet with the customer, including whether having a second person present is required • prepare for the meeting and gather relevant information • contact the customer to set clear expectations for the meeting, including the issues to be discussed and behavioural expectations • review the Local Response Guidelines (LRG) for the site/office and undergo LRG induction prior to attending the meeting • see the Customer Aggression guidelines if any security risks are identified or if there is a history of security incidents • notify the relevant Service Centre Manager via the PS Team Leader and advise if there are any security or customer aggression risks
3	**Agreeing on a meeting location** + Read more ...

	The preferred location for a face-to-face meeting is a Department of Human Services Service Centre (Centrelink or Medicare). Go to Mapstat for locations of front facing service centres. If an alternate location is identified, the PS Team Leader must approve the location e.g. consider meeting at the office of the local Member of Parliament. Security is an important consideration in deciding the appropriate venue. **Note:** meetings in MP offices must be organised through Customer Review.
4	**Deciding who will meet with the customer** + Read more ... There may be occasions when more than one PS Case Manager is required to attend the face-to-face meeting or the customer needs to be reallocated for better management. If this is the case, the PS Case Manager and Team Leader will decide who will meet with the customer. A decision will be made based on: • the meeting location • the potential benefits of a face-to-face meeting • the customer's individual circumstances • whether the customer has already developed rapport with a PS Case Manager • whether more than one face-to-face contact is likely to occur

Resolve customer issues

Identify options and resolve customer issues

This table describes the processes used by Personalised Services Case Managers to resolve customer issues.

Step	Action
1	**Allocate customer segment** + Read more ... Personalised Services(PS) customers are allocated to a customer segment based on: • the source of the PS referral • the issues presented by the customer • interactions between the customer and Child Support • your assessment of the actions likely to be required to manage and resolve the customer's issues Allocate the customer to either: • Personalised Services customer segment 1. See Allocate customer segment 1, • Personalised Services customer segment 2. See Allocate customer segment 2 • Personalised Services customer segment 3. See Allocate customer segment 3 Whilst managing the customer change the customer segment if this is indicated. Record the customer segment in the: • Trigger Details dialogue box in the Customer Management Plan Overview window • PS Activity Database

	Update both records each time the customer segment changes. **Note**: PS Case Managers can allocate a customer to a different segment if the customer characteristics change.
2	**Identify options to resolve customer issues** + Read more ... PS Case Managers are the single point of contact for Personalised Services customers and work with Child Support Officers, external services in the community and other government agencies to ensure: • customer issues are identified • all options are presented to the customer • all possible assistance is provided When identifying options to resolve the customer's issue/s, consider the strategies suggested for the relevant customer segment, see Customer Segments.
3	**Record customer options** + Read more ... Record the options identified for the customer in the Personalised Services Plan (PSP) after considering: • publications that may assist the customer • processes available to the customer to address their child support issues • whether a referral to a specialised activity such as objection, change of assessment, compensation or privacy is appropriate. Discuss possible outcomes with specialist officers from the relevant business area. A conference call with the customer and specialist officer is an option • social worker referral if provided • external organisations that may assist the customer to resolve the issues. See Service referrals for child support customers • whether face-to-face contact with the customer is recommended to remove the communication barrier for resolving their issues. See Face to face contact Speak to the PS Team Leader to discuss any issues or for assistance determining options available to the customer.
4	**Confirm customer issues and options in writing** + Read more ... Send the UQ140.01 - Personalised Services Confirmation of first call letter to the customer. The PS Confirmation of First Call letter may not be appropriate for segment 1 and some segment 2 customers where it is unlikely to provide further clarification of a straightforward issue. If this is the case, discuss the matter with the PS Team Leader and document the decision in the PS Plan

Managing cases involving specialist decision makers

Specialist decision makers

This table describes the processes used by Personalised Services Case Managers working with specialised decision makers.

Step	Action

1

Managing cases involving specialist decision makers + Read more ...

The Personalised Services (PS) Case Manager has a mandate to control activity and communication on the case they are managing. While the PS Case Manager is the single point of contact for the customer, this does not preclude decision makers in other areas of the department from communicating with the customer.

The PS Case Manager makes routine decisions required on the case, including where the customer seeks face to face service.

Customer Service Officers who are in contact with a PS customer, whether by phone or in person in a service centre, must contact the customer's PS Case Manager for advice about how to proceed.

Where there is a need for a specialised activity, the specialist decision maker must contact the PS Case Manager to consult on the case prior to taking any action or notification of a decision (as per the PS Mandate). Specialised activities include estimates, change of assessment, objection, international court orders, litigation, freedom of information, privacy, departure prohibition order, specialised care or similar.

2

Personalised Services Case Manager role + Read more ...

The role of the PS Case Manager is to:

- advise the decision maker of any outstanding issues on the case, e.g. privacy breaches, compensation claims, complaints, FOI, escalations or third party involvement
- ensure the decision maker is aware of special customer contact conditions such as restricted service and discuss how to manage this for the duration of the decision making process
- negotiate and document the agreed approach to communication between the customer and the decision maker, for example involvement if any, managing face-to-face interaction, the need for regular updates to be provided, who will communicate the decision and how
- facilitate the provision of applications, forms or other information required by the business process
- read the decision and confer with the decision maker to ensure understanding of the decision, and the implications for the customer. Jointly agree on an approach to communicate the decision to the customer
- check that the decision has been implemented as intended

The PS Case Manager's involvement in the specialised activity does not replace the authority or delegation of the specialist decision maker.

It is critical to avoid any delay which may affect the making of specialist decisions as they may have legislated timeframes or other activity deadlines, and the PS Case Manager will ensure the consultation does not add to the time taken.

3

Contact associated customer + Read more ...

Contact the associated customer if necessary to resolve any primary customers issues. See contacting customers table – Step 2, and tailor the conversation to the customer's individual circumstances.

4

Follow-up contact with customer + Read more ...

Contact the customer to discuss the points in the follow-up contact list then:

- record the discussion in the PS stacking document
- record the customer's options in the PS plan

	• take actions as agreed with the customer • create a follow-up intray if required See Customer contact for Personalised Services, Step 2 and Documentation and mandatory issues. Go to Step 1 or Finalising a case - submission and review
5	**Customer declines options** + Read more ... If the customer declines or refuses to take up the options presented and there is no further action available to assist the customer with their child support issues, discuss options to progress the matter with the team and the PS Team Leader.

Refer to Team Leader for finalisation

Finalising a case - submission and review

This table describes the processes used by Personalised Services Case Managers preparing a case for finalisation.

Step	Action
1	**Finalise case** + Read more ... Personalised management of the customer can be finalised when: • all Customer Management Approach activities are completed. See Customer Management Approach (CMA) for Child Support • all issues managed by Personalised Services (PS) are finalised where possible • all actions in the PS plan have been completed • there are no outstanding intrays (except where these relate to other specialised issues that are still in progress) • any written responses from Ministerial or Ombudsman complaints have been received and understood by the customer • the customer has been notified of any decisions • relevant feedback has been provided Contact the customer to advise all current child support issues have been addressed and the case is to be transferred out of Personalised Services. If the customer cannot be contacted by phone, issue the UQ140.02 - Personalised Services Exit Letter Provide the customer 10 days to respond before submitting a finalisation request.
2	**Submit finalisation request** + Read more ... • To submit a customer management finalisation request to the PS Team Leader: • update the PS Plan by setting all issues to resolved • use the Personalised Services macro to record a finalisation document in the stacking document • transfer the customer to the PS Team Leader • update the PS database
3	**Review case (Personalised Services Team Leader)** + Read more ...

	When a finalisation request is submitted by a PS Case Manager: • review finalisation document in the PS stacking document. See Documentation and mandatory issues • review the PS Plan • decide whether to approve the finalisation request for one of the following reasons: ◦ the customer's child support issues have been addressed as per the PS Plan and Customer Management Approach ◦ the customer has declined to take up their options ◦ a specialist process involving the customer is ongoing but all other child support issues have been resolved ◦ the customer is recommended for a segment 3 customer Before finalising a PS customer management activity and returning a customer to the relevant business area for ongoing management, all actions in Step 1 must be completed.

Refer to Team Leader for finalisation

Finalising a case- Action

This table describes the processes used by Personalised Services Team Leaders and Personalised Services Case Managers to finalise a case.

Step	Action
1	**Finalise customer management when options declined (Personalised Services Team Leader)** + Read more ... The finalisation request can be approved when all of the following conditions are satisfied: • all mandatory issues have been addressed appropriately. Documentation and mandatory issues. • the Personalised Services(PS) Case Manager has clearly communicated all available options to the customer and confirmed this in writing • the PS Case Manager provided the customer with a suitable timeframe in which to take up the options • ongoing management in PS will not resolve the customer's issues Go to Step 2 or Step 3
2	**Finalisation request approved (Personalised Services Team Leader)** + Read more ... If the finalisation request is approved: • ensure the status of all issues in the Issue Details dialogue box in the Customer Management Plan Overview window is 'resolved' • document the approval in the PS stacking document • action the finalisation request in the PS Service Manager actions List window Go to Step 5

3	**Finalisation request not approved (Personalised Services Team Leader)** + Read more ... • reject the finalisation request in the PS Service Manager actions List window • discuss the reasons for the decision with the PS Case Manager • agree on the next steps to resolve the customer's issue • document the decision in the PS stacking document and Customer Transfer window Update the PS plan to: • reset the issue status to 'confirmed' • update the comment text with the decision and action required If the customer requires reallocation to Segment 3 go to the Customer requires ongoing reactive management table
4	**Transfer customer to a specialist business area (Personalised Services Team Leader)** + Read more ... Approve the customer transfer to a specialist business area when: • all mandatory issues have been addressed appropriately • the only outstanding issue is the process managed by the specialist business area e.g. change of assessment, objection • the customer does not have a history of escalating Child Support decisions
5	**Action finalisation outcome (Personalised Services Case Manager)** + Read more ... If the finalisation request is approved by the PS Team Leader: • document the case has been transferred from PS in the Customer transfer window notepad. • unlock the customer in accordance with the Customer Management Approach. Ensure the case is transferred to the relevant business line. See Transfer or lock a customer Cuba process help • update the Personalised Services Database If the finalisation request is not approved by the PS Team Leader: • reactivate the customer • review the Team Leader comments in the Personalised Services Plan (PSP) and PS stacking document • action unresolved issues To resolve the customer issues refer to Resolve customer issues table.

Ongoing reactive management

Customer requires ongoing reactive management

This table describes the processes used by Personalised Services Team Leaders and Case Managers to provide ongoing reactive management

Step	Action
1	

	Classify customer as segment 3 (Personalised Services Team Leader) + Read more ... Approve classification of the customer to segment 3 for one of the following reasons: • the customer requires a high level of ongoing support and reactive management • the customer has customer contact restrictions imposed by Child Support See Allocate customer segment 3
2	**Customer requires ongoing reactive management (Personalised Services Team Leader)** + Read more ... Assign the customer to segment 3 for ongoing reactive management when: • the mandatory issues have been addressed appropriately. See Documentation and mandatory issues, Step 3 • all other child support issues have been resolved • the customer has a history of escalating issues with the department and ongoing management by Personalised Services(PS) is likely to restrict the impact on the business Document the decision in the Issue Comments dialogue box in the Customer Management Plan Overview window. See Documenting Child Support information in Cuba Update the sensitive issues indicator with a review date of no longer than three months. At the end of the review period: • review the case and customer records • discuss any the outstanding issues on the Personalised Services Plan(PSP) with the PS Team Manager • document the outcome of the review in the PS stacking document. See Documentation and mandatory issues, Step 2 If the outcome of the review is that ongoing reactive management is no longer required: • update the customer segment to segment 2 • remove or update the sensitive indicator • refer back to Resolve customer issues if there are still outstanding issues • refer back to Finalising a case- submission and review if all outstanding issues are resolved If the outcome of the review is that ongoing reactive management is still required: • update the review date on the sensitive indicator for no more than 3 months.
3	**Customer has restricted service with Child Support (Personalised Services Team Leader)** + Read more ... Assign the customer to segment 3 if they demonstrate continued unreasonable conduct in their interactions with Child Support and limiting the customer's contact with the department is appropriate. See Restricted service customer options (CS). Customers with restricted service are reviewed every three to six months. The outcome of the review must be approved by the National Manager of Quality and Customer Complaints,

References

This page contains links to policy and legislation. It also contains information about government department arrangements.

Policy

The Child Support Guide 4.0: Objecting, seeking a review, appealing and applying to court

The Child Support Guide 6.9: Complaints

The Child Support Guide 6.10: Family violence

The Child Support Guide 6.11.1: Compensation

The Child Support Guide 6.11.2: Waiver

Legislation

Links to the Comlaw site now point to a 'Series' page which lists all available historical versions. Select 'Current' and then navigate to the appropriate legislative reference(s) listed below.

There are no specific sections that relate directly to Personalised Services.

Refer to Child Support Legislation (Comlaw)

Resources

This page contains links to resources for Personalised Services.

On this Page:

Documentation and mandatory issues

Documentation and mandatory issues for PS

This table describes documentation and mandatory issues for Personalised Services.

Step	Action
1	**Documentation in Personalised Services**

	The Personalised Services (PS) stacking document is a record held in one location documenting all discussions between the customer and PS Case Manager. Create a PS stacking document in the Communication window and update it as follows: • document all discussions with the customer • use appropriate headings for each discussion, or decision in the stacking document • record decisions in the relevant CUBA window in addition to the stacking document • record more detailed information about the mandatory issues and other customer issues reported in the Personalised Services Plan (PSP) The PS stacking document and PSP are the primary documentation source for information about PS customers.

2	**Principles for the use of stacking documents**
	
	Record the date the PS stacking document is created in the Core Issue Details dialogue box in the Customer Management Plan Overview window.
	
	Create the PS stacking document in the Communication window:
	
	• the first notepad in the stacking document is to be titled 'PS referral' and must provide the reason why the customer has been referred for Personalised Services
	• use a meaningful subject heading for each new notepad within the stacking document, e.g. 'Call about estimate', 'COA application discussion
	• record details of the discussions with a customer including:
	  ◦ options provided
	  ◦ actions either you or the customer have committed to take
	  ◦ agreed timeframes
	• where the department have imposed Restricted Servicing Arrangements the stacking document contains a record of the case review, recommendation, approval to restrict the service and the letter sent to the customer
	• PS Team Leaders record their decision to approve or not approve the transfer of a customer out of PS
	• the stacking document does not replace function specific notepads e.g. non agency payments, income, change in care. Add a 'pointer' in the stacking document referring to the function specific notepad

3	**Mandatory issues** Personalised Services Case Managers are required to gather information from customers about the five mandatory issues: • Income Correct • Care Correct • Customer Contact Details • Payment Activity for Ongoing • Payment Activity for Arrears Each of the mandatory issues must be addressed and information updated accordingly to ensure the child support assessment is accurate and the customer is meeting their child support obligations.

	Record the mandatory issues in the Personalised Services Plan using the issue and classification: • Income Correct - Financial • Care Correct - Access • Customer Contact Details - Other • Payment Activity for Ongoing- Financial • Payment Activity for Arrears - Financial

Customer segments

Allocate customer segment 1

This table describes the processes used by Personalised Services Case Managers working with segment 1 customers.

Step	Action
1	**Personalised Services customer segment 1** **Referral source** A customer is generally allocated to segment 1: • when they are the associated customer and a decision is made that this is required • following a proactive referral to Personalised Services when identified that short term management or early intervention may resolve the customer issues
2	**Customer characteristics** A customer is generally identified as being in segment 1 when they: • have not been previously managed in Personalised Services(PS) • usually manage their own child support matters • meet their child support commitments • present with a single issue and there is no history of long-term or entrenched issues • need support to identify options to resolve their issue • are likely to self-manage their child support matters once the issue is resolved

3	**Cuba indicators**
	The following Cuba indicators support allocation to segment 1:
	• no recent activity in the SCS Activity Summary window
	• there is no current Departure Prohibition Order (DPO) recorded in the Payer Collection window
	• a review of customer account windows indicates:
	  ◦ there is no recent history of non-compliance
	  ◦ the customer has not recently defaulted on a payment arrangement

4	**Strategies for resolving issues for segment 1 customers**

	A customer allocated to segment 1 will generally return to managing their own child support matters following a short-term period of intensive management by a PS Case Manager. Strategies for managing and resolving customer issues may include: • reviewing the customer communication and case records to ensure the child support assessment is correct, including the mandatory issues • undertaking any actions required to correct the assessment, see Correcting errors on Child Support cases • contacting only the primary customer where information is not required from the associated customer/s to resolve the customer's issue • referring the customer to the PS Team Manager for finalisation once the immediate customer issue has been resolved

Customer segments

Allocate customer segment 2

This table describes the processes used by Personalised Services Case Managers working with segment 2 customers

Step	Action
1	**Personalised Services customer segment 2** **Referral source** A customer is allocated to segment 2 when referred to Personalised Services(PS) following an escalated enquiry, including: • an enquiry from a Member of Parliament • an Ombudsman enquiry • a Ministerial response • a step 3 complaint • via the Customer Review Referral Gateway • a privacy breach • escalation to the media
2	**Customer characteristics** A customer is generally identified as being in segment 2 when they: • have previously been managed in PS • have multiple child support issues and a substantial case review is required to address these • have issues external to Child Support that impact their child support case • are experiencing difficulty identifying and accessing their options • do not meet their child support responsibilities • demonstrate behaviours that may require longer term management by a PS Case Manager
3	**Cuba indicators**

	The following Cuba indicators support allocation to segment 2: • a recent entry in the SCS Activity Summary window • previous step 3 complaints reported in the SCS Activity Summary window (either upheld or not upheld) • a review of customer account windows indicates: 　◦ there is a history of non-compliance 　◦ the customer has previously defaulted on a payment arrangement • a DPO is recorded in the Payer Collection window • the customer has previously applied for compensation or waiver • the customer has previously advised they believe their privacy has been breached
4	**Strategies for resolving issues for segment 2 customers** A customer allocated to segment 2 may require longer-term intensive case management by a PS Case Manager to enable them to move towards management of their own child support matters. Strategies for managing and resolving customer issues may include: • conducting a comprehensive review of the customer communication and case records to ensure the child support assessment is correct, including but not limited to a review of: 　◦ the mandatory issues 　◦ prior Child Support decisions 　◦ the income history for both parents (where relevant to the child support assessment) 　◦ all previous care records 　◦ customer contact records to ensure previously identified issues were actioned • a face-to-face meeting to listen to issues and explain the review of the case • a letter to the customer: 　◦ confirming the outcome of the review of all issues on the case 　◦ clearly stating which issues are outside the responsibility of Child Support 　◦ explaining the customer's options to resolve the issues • estimate review or reconciliation where appropriate • undertaking any actions required to correct the assessment, see Correcting errors on Child Support cases • setting clear timeframes and monitoring to ensure the customer complies • seeking and documenting the customer's acknowledgement that issues are resolved • taking a collaborative case management approach with other PS Case Managers and the Team Leader to ensure all options are identified to resolve the customer's issues in a timely manner

Customer segments

Allocate customer segment 3

This table describes the processes used by Personalised Services Case Managers working with segment customers

Step	Action
1	**Personalised Services customer segment 3** **Referral source** A customer is allocated to segment 3 (after a discussion with the Personalised Services(PS) Team Leader) when: • they have customer contact restrictions imposed by Child Support, see Restricted service customer options (CS) • they have a history of escalating issues with Child Support and ongoing management by PS is likely to restrict the impact on the rest of the business
2	**Customer characteristics** A customer may be identified as being in segment 3 when they: • have previously been managed in PS and elected not to take up options to resolve the identified issues • have a history of escalating child support issues, including multiple step 3 complaints • have multiple child support issues and an intensive case review, including previous decisions and outcomes, is required • have displayed ongoing unreasonable behaviour including repeated customer aggression or self-harm threats • require intensive management due to the highly sensitive nature of the case • do not meet their child support commitments on an ongoing basis • are assessed as requiring ongoing management by PS to minimise the impact on other officers

3	**Cuba Indicators**
	The following Cuba indicators support allocation to segment 3:
	• security incidents have been recorded
	• multiple recent entries in the SCS Activity Summary window
	• multiple step 3 complaints about the same or similar issue/s reported in the SCS Activity Summary window (either upheld or not upheld)
	• a review of customer account windows indicates:
	  ◦ there is a history of non-compliance
	  ◦ the customer has defaulted on previous payment arrangements
	• a DPO is recorded in the Payer Collection window
	• the customer has previously applied for compensation or waiver
	• the customer has previously advised they believe their privacy has been breached

4	**Strategies for resolving segment 3 customer issues** A customer allocated to segment 3 requires ongoing intensive case management by a PS Case Manager to restrict negative impacts on the business and on customer and stakeholder confidence in the department.

	In addition to the strategies for managing and resolving the issues for customer segment 2 the Case Manager should: • objectively review **all contended issues** by conducting an intensive retrospective case review of previous assessment and decisions, issues outcomes and communications. The review may extend to the start date of liability • address issues thoroughly, communicating clearly and with care. The aim is to ensure the issue is demonstrably addressed in a way which can be easily understood, correct any error and limit further responses on the issue • keep relevant stakeholders informed of key changes to the customer's case which could impact on that stakeholder • take a structured collaborative approach to ensure all communications with customer are consistent • use written communication as a means of informing and confirming actions and outcomes

Supporting resources

Customer Referral Services

Parent Support Service

Security Incident Reporting

Macros

Personalised Services Case management

Letters

UQ140.00 - Personalised Services Management Introduction Letter

UQ140.01 - Personalised Services Confirmation of first call

UQ140.02 - Personalised Services Exit Letter