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iSupport

cross-border recovery
of maintenance obligations
*pour le recouvrement transfrontière
des obligations alimentaires*

iSupport User Manual

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1 Introduction

1.1 Overview

iSupport is a case management system that enables caseworkers to process cross border maintenance recovery cases. iSupport is designed to handle three types of applications: Convention, Regulation or neutral for any international instruments (for instance the 1956 NY Convention or any bilateral agreement). Therefore, iSupport can be used for all applications falling within these three types, involving any other State and irrespective of whether the other State uses iSupport.

1.1.1 Modules

iSupport is divided in seven modules:

1. Actor module (screens allowing data collection of actors across all cases). Actors are debtors, creditors, children, courts and authorities.
2. Case module (screens allowing creating, working on and closing a case).
3. Financials module (funds monitoring).
4. System module (screens enabling management of roles and access rights, customisation of target dates).
5. Task list module (showing all outstanding tasks with deadlines).
6. Reports (statistical reports).
7. Resources (link to outside sources such as iSupport page and Country Profiles).

1.1.2 Flexible case management

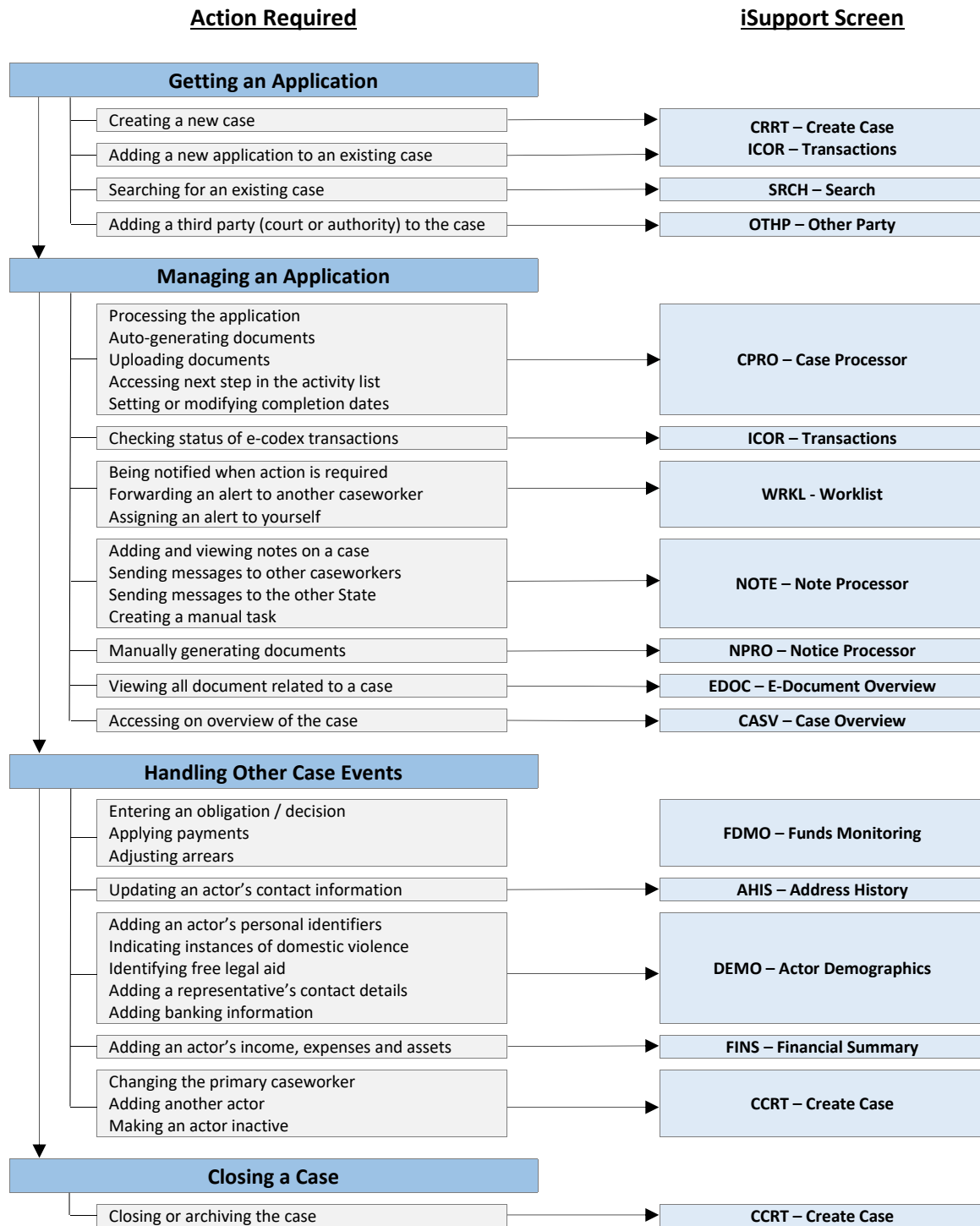
Given the different types of organisations involved, and differences in policies and procedures in each Central Authority, iSupport deliberately does not require the caseworker to take case processing steps in any required order. Good practises and tips are highlighted in this manual; however each Central Authority/caseworker is able to define their own way/order of processing the case.

To facilitate this, iSupport was designed to enable the manager/administrator to set a number of parameters (deadlines, access rights, help text customisation) that reflect the particular State or organisation practices and to allow the caseworker to easily navigate from one screen to another in the same case, in any desired order.

1.1.3 Definition of a case

A case in iSupport is defined as a case concerning the same debtor and person(s) for whom maintenance is sought, and involving the same requesting and requested States. A case can involve one or more applications.

1.2 Basic Workflow in iSupport



1.3 Case Examples

1.3.1 Outgoing application for recognition and enforcement on a Convention case

Scenario: This is the basic scenario that will allow you to become acquainted with iSupport: you would like to send an application for recognition and enforcement of a decision, on the basis of the 2007 Convention. This example will show you how to enter the data as requested by the Convention.

1. Navigate to CCRT – Create Case to enter the application details.
2. Enter the application details under the Application, Natural Person, and Public Body (if applicable) tabs – note that you need to click on the blue down arrow to display details. Remember to enter as much information as possible – in particular the maintenance basis in the natural person tab. When entering each actor remember to click ‘Search’ after any data entry and ‘Save’ after finalising the entry of each actor. Once all your data entry is complete, select the Case tab and click ‘Create/Link iSupport Case’. This creates the iSupport case.
3. If you want other caseworkers assigned to the case, a manager can do this by using CWRK – Caseworker.
4. Navigate to DEMO – Actor Demographics . Click on ‘Modify Actor Demographic’ to add information about the actor under the Personal Data tab and banking information under the Payments tab. This is where you will be able to add, in particular, information about legal aid. Navigate between different actors by using the magnifying glass next to the Actor ID field.
5. Navigate to FDMO – Funds Monitoring to enter information about a decision. Select ‘Manage Obligations’ from the list of screen functions to add payments due related to a decision – do not forget to select a decision first in ‘Select Filters’ section.
6. If you need to create a new court for the decision in FDMO, navigate to OTHP – Other Third Party screen and select ‘Add Other Party Information’ from the list of screen functions.
7. Navigate to FINS – Financial Summary to add financial information about the actors. Part of this data can be used to create the financial circumstances form.
8. Navigate to CPRO – Case Processor:
 - a. Click the blue numbered icon under the Active column.
 - b. Select ‘View’ icon and click ‘Process Application’.
 - c. If you are satisfied with the details of the case, select ‘Ensure That Case Meets Criteria’.
 - d. Select ‘Generate Application and Transmittal Form and Upload additional Documents’.
 - e. At this stage you can also upload documents using the corresponding link.
 - f. The tick boxes under ‘Documents’ indicate which forms will be created. You can enclose the financial circumstances form if applicable.
 - g. Click ‘Save’ and the form will be generated. Note: you need to manually select some information in the form that appears on the screen: type of application, bases for recognition and enforcement, appearance of the respondent and attestations. The same also applies for the transmittal form: type of application, enclosed documents.
9. You can now await the requested State’s reply.

1.3.2 Outgoing modification on a Regulation case

Scenario: An application has been received and Part B of the Regulation form has already been filled out by the applicant. The local policy of the Central Authority is to store only essential data in iSupport and send out the application as soon as possible. You need one more document from the applicant before being able to send the application.

1. Navigate to CCRT – Create Case to enter the details of the application to create the iSupport case.
2. Select ‘Create Case’ from the lists of screen functions. Enter the application details under the Application, Natural Person, and Public Body (if applicable) tabs. Remember to enter as much information as possible. When entering each actor remember to click ‘Search’ after any data entry and ‘Save’ after finalising the entry of each actor. Once all your data entry is complete, select the Case tab and click ‘Create/Link iSupport Case’. This creates the iSupport case.
3. If you want other caseworkers assigned to the case, a manager can do this by using CWRK – Caseworker.
4. Navigate to OTHP – Other Party to create the authority of origin.
5. Navigate to FDMO – Funds Monitoring and enter the details of the decision of origin.
6. Navigate to CPRO – Case Processor:
 - a. Click the blue numbered icon under the Active column.
 - b. Click on the ‘View’ icon and on the next screen ‘Request Process and Generate Application Forms’.
 - c. On the next screen, choose ‘Unable to process the request due to missing information in the folder ~ receiving additional documents – Applicant’.
 - d. Click the ‘Save’ icon on the toolbar. This opens the Word document allowing data entry. You can keep it as is, or customize it.
 - e. Click ‘Generate Document’ and print the document. A copy will be available in EDOC - Overview of Electronic Documents.
 - f. To create a customized deadline for the applicant’s response, select Modify Alert Days.
 - g. Enter the number of days to complete and click ‘Save’.
7. When the applicant responds, navigate to CPRO – Case Processor to upload the documents.

1.3.3 Incoming enforcement on a Convention case

Scenario: A new enforcement application has been received. Your internal policy is to always request voluntary payment from the debtor before sending the application for enforcement.

1. First check ICOR - Transactions for any new incoming applications that are successfully received. If found, double-click on the relevant case number, this will take you to CCRT – Create Case. The case data will be prepopulated. If the application is not found, navigate to CCRT – Create Case to manually enter the details.
2. Proceed to create the iSupport case.
3. If you want other caseworkers assigned to the case, a manager can do this by using CWRK – Caseworker.
4. Navigate to the OTHP – Other Party Information to store the contact details of the court/administrative authority of origin. This can be done at any time when processing the case and links the third party to the case/application.
5. Navigate to FDMO – Funds Monitoring to enter the decisions details and any payments/arrears.
6. Navigate to NPRO – Notice Processor to generate a letter to the debtor.
7. To create a customized deadline for the debtor's response, navigate to CPRO - Case Processor and select Modify Alert Days.
8. Enter the number of days to complete and Save.
9. When the deadline expires and appears on the WRKL - Worklist, navigate to CPRO – Case Processor to start processing the case using the appropriate Convention activity list.

1.4 How and when to contact helpdesk

If you experience a technical issue, or have a question about using a function; please try the following steps before contacting the iSupport Helpdesk:

- Clear your browser history. This often helps, particularly after a new release of the software has been installed.
- Contact your administrator who will be able to check that batch jobs are correctly set or that the e-CODEX connection is still active.
- Check the User Manual to make sure you are following the correct steps and tips when using iSupport. You can also go to the iSupport web page and access the [Design Specification Documents \(DSD\)](#) which provides details of each screen.
- Ask your colleagues if they are experiencing the same problem, or check to see if they have a solution. Also check the iSupport Teams Pages.

If none of the steps above help you, please create an issue in JIRA:

1. Sign in using your country user name and password.
2. Select the type of issue:
 - Incident – the iSupport functionality is not working
 - Question – need clarification on how to perform a certain step or action and cannot find the answer in the User Manual
 - Improvement – suggest a change to an iSupport functionality that would make your work easier

3. Enter a description. Try to be as specific as possible by including the name of the screen(s), details of the steps you are trying to take and the problem or error encountered. Wherever possible, attach screenshot(s) to the JIRA issue.

Please inform iSupport@hcch.net.

- Successful login opens to the WRKL – Work List screen and displays assigned tasks, open tasks, notifications and assigned cases.

Task List > Work List > Modify Alerts

Search Filters Worker: Jean-Marc Pellet From Date: 01/02/2019 To Date: 13/04/2022 Order to Display: Ascending Date Sort By: Convention/Regulation Refresh

Assigned Tasks

Task Due 3 Task Overdue 88 Next Action 9

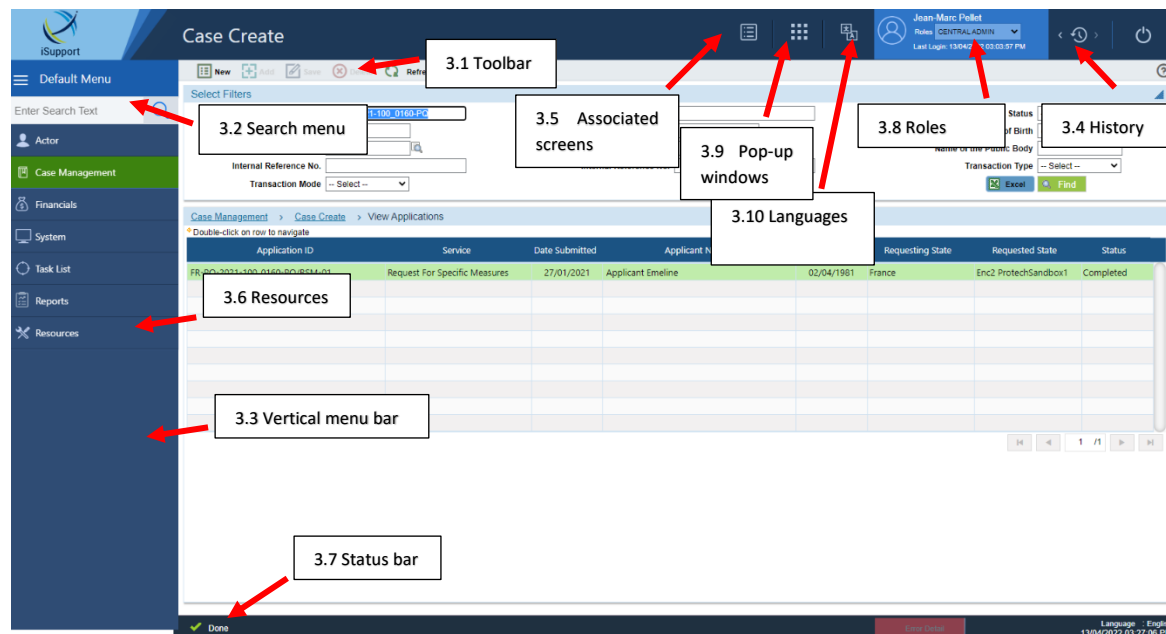
Assigned Tasks Open Tasks Notifications Assigned Cases

Date Created	Case Number	Case Status	Status Date	Case Type	Transaction Type	Debtor Name
07/03/2019	PQ-PS(AA)-2019-100_0005-PQ	Open	07/06/2019	Convention	Outgoing	Threepwood Freddie
12/03/2019	PQ-PS(BB)-2019-100_0008-PQ	Open	12/03/2019	Convention	Outgoing	Fotheringay-Fipps Cyril
12/03/2019	PQ-PS(AA)-2019-100_0009-PQ	Open	12/03/2019	Convention	Outgoing	Chuffnel Marmaduke
18/03/2019	PQ-PS(CC)-2019-100_0021-PQ	Archived	19/09/2020	Convention	Outgoing	Droz Marcel
17/04/2019	PQ-PS(AA)-2019-100_0043-PQ	Closed	22/03/2021	Convention	Outgoing	Tag Roscoe
14/05/2019	PQ-PS(AA)-2019-100_0059-PQ	Open	14/05/2019	Convention	Outgoing	DEBTOR JACK
19/06/2019	NL-PQ-2019-100_0062-PQ	Archived	29/01/2020	Regulation	Incoming	Ah Annie
27/06/2019	PQ-PS(AA)-2019-100_0067-PQ	Open	27/06/2019	Other international	Outgoing	DEBTOR JACK
27/06/2019	PQ-PS(AA)-2019-100_0068-PQ	Open	04/07/2019	Other international	Outgoing	Tuck André
16/07/2019	PS(AA)-PQ-2019-100_0386-PS(AA)	Open	16/07/2019	Convention	Incoming	Ferrier Lorenzo

Note: For security reasons, you will automatically be logged out if your session is idle for more than 30 minutes.

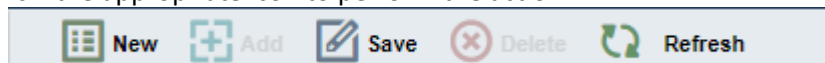
3 Navigating in iSupport

There are various tools and ways to navigate in iSupport. Here are some of the features.



3.1 Toolbar

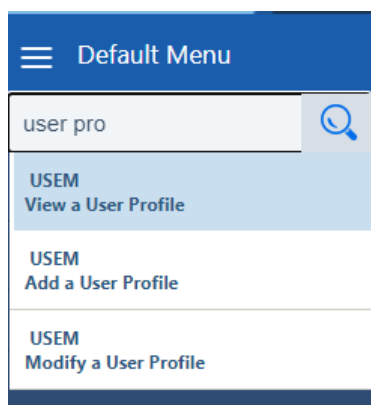
The icons on the toolbar are enabled depending on the screen and action being taken on the case. 'Click' the appropriate icon to perform the action.



- **New** – clears the current case information (sticky data) from the screen
- **Add** – used when new data is being added to a case
- **Save** – used when existing data is updated on a case
- **Delete** – used to delete an existing record or entry
- **Refresh** – Reloads the screen while retaining the selected filters. Uncommitted data entered prior the clicking the Refresh icon is not retained. A warning message advising uncommitted data will be lost is displayed.
- **Print** – prints the screen with the data currently displayed
- **Clear** – clears all fields on the screen
- **Exit** – used to close iSupport

3.2 Search menu

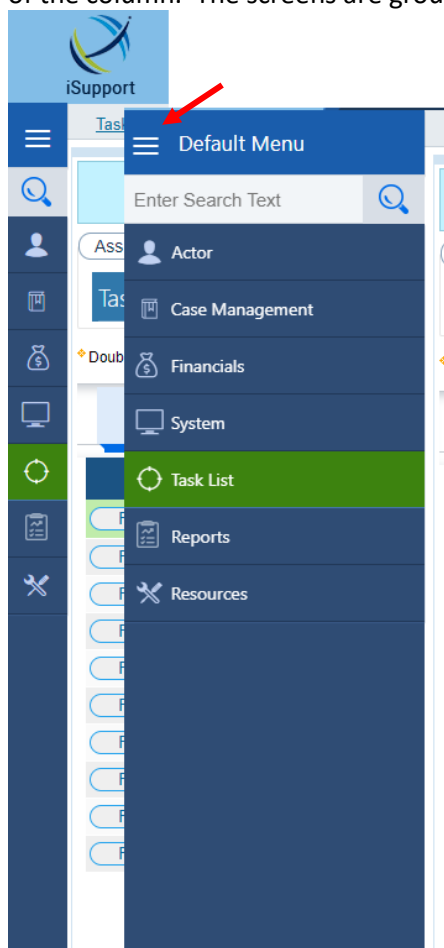
1. Click in the search field and type in a screen acronym or a functionality



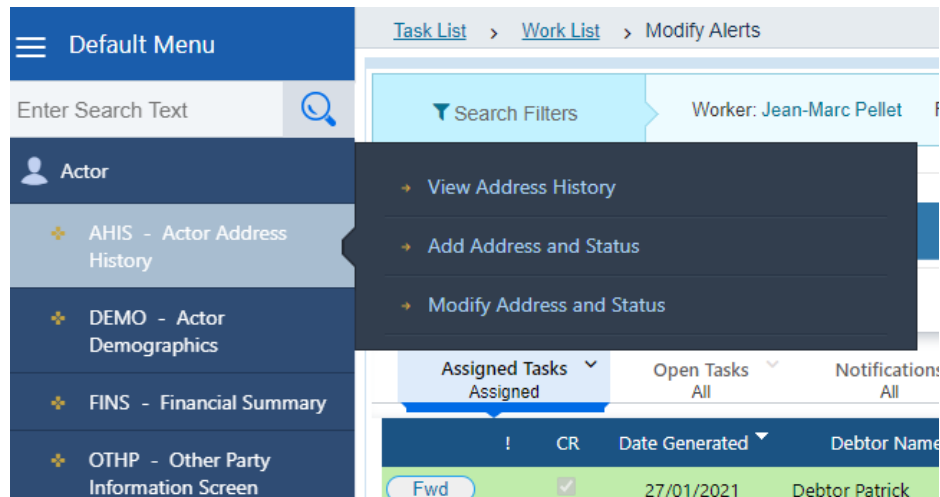
2. Click on the result to navigate to the appropriate section.

3.3 Vertical Menu Bar

1. The vertical menu bar is shown by default and can be reduced by clicking at the top of the column. The screens are grouped by category.



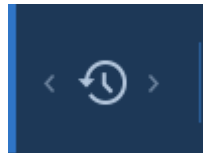
2. Click on the appropriate category to display screens under that category. Hovering your mouse over a screen will display the associated screen functions.



3.4 History Feature

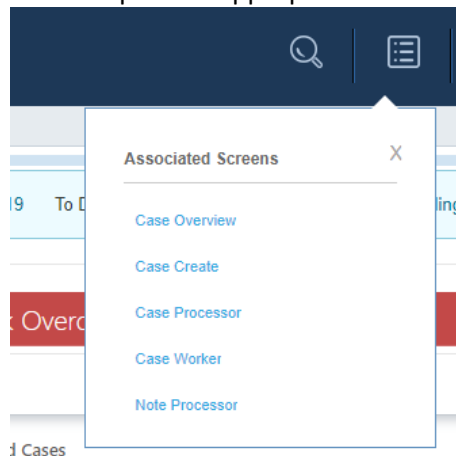
1. Click the left arrow to navigate to the previous screen.
2. Click the right arrow to navigate back.

Note: It is recommended you use these instead of your browser navigation arrows.



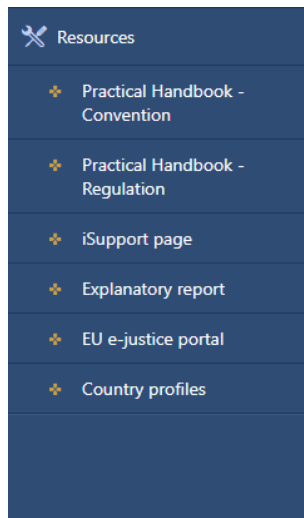
3.5 Associated Screens

1. After navigating to a screen, the 'Associated Screens' section has links to other related screens for quick access.
2. Click to open the appropriate screen.



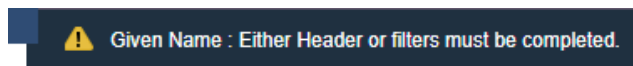
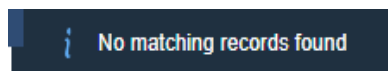
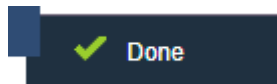
3.6 Resources

1. Click the 'Resources' tab to access publications or to find additional information.



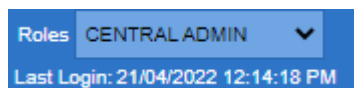
3.7 Status Bar

Depending on what action is taken, a confirmation or error message is displayed in the status bar at the bottom of the screen, examples:



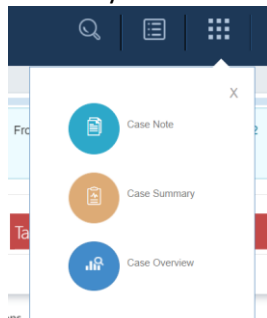
3.8 Roles

Viewing or modifying case information will vary depending on the user's role(s) in iSupport. The role is shown at the top of the page (drop-down menu if there are several roles).



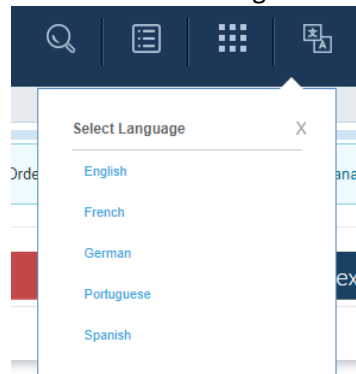
3.9 Pop-up windows

Clicking on this button allows you to select a screen to open as pop-up window: NOTE, Case summary and Case Overview.



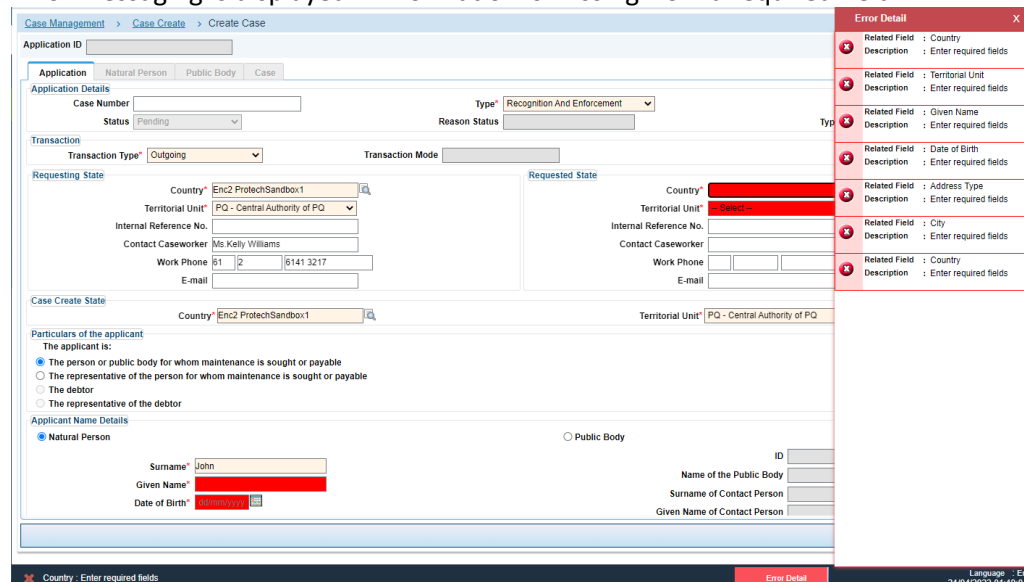
3.10 Languages

Use this box to change the display language.



3.11 Error handling

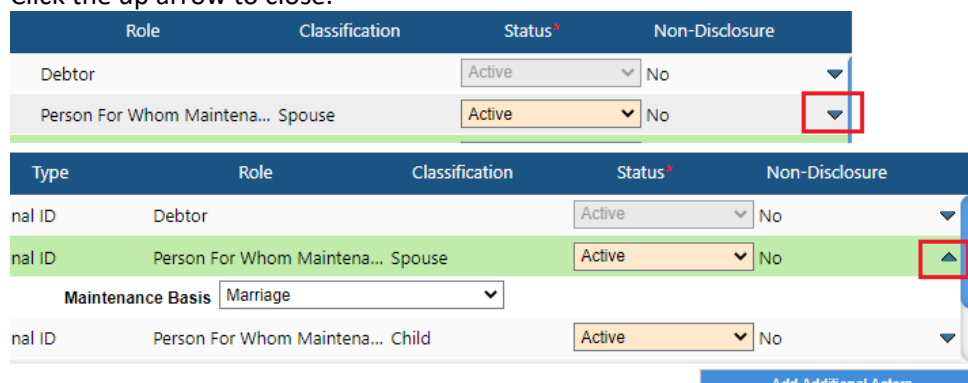
Error messaging is displayed if information is missing from a required field.



3.12 View & Hide features

Many screens have additional case information not initially displayed. To access:

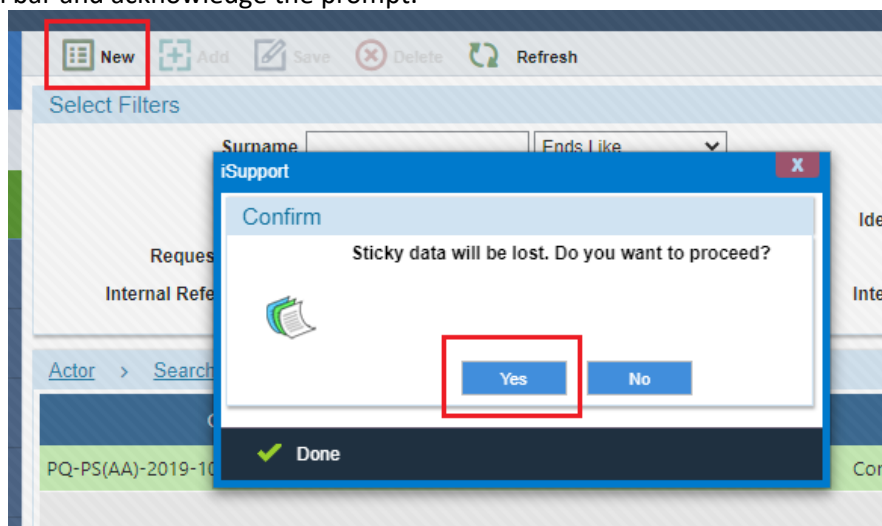
1. Click the down arrow on the far right of the screen to reveal more details.
2. Click the up arrow to close.



3.13 Navigating between screens

When navigating between screens, the case data known as ‘sticky data’ will carry over from one screen to another.

If you want to clear the existing case information from a screen, select the ‘New’ icon from the tool bar and acknowledge the prompt.

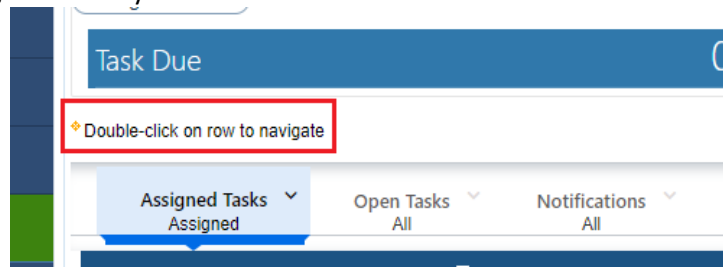


Selecting ‘Yes’ does not delete the case data; it only removes the information from that screen for the current instance.

3.14 Navigation hints

3.14.1 Double-click to open next screen

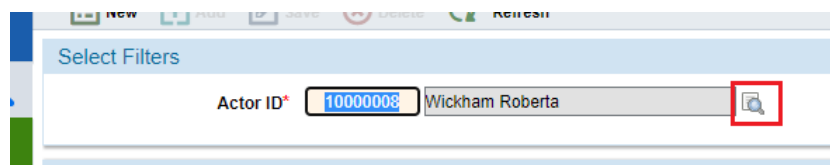
Some screens show a navigation hint when it is possible to get to the next screen by double-clicking on an entry.



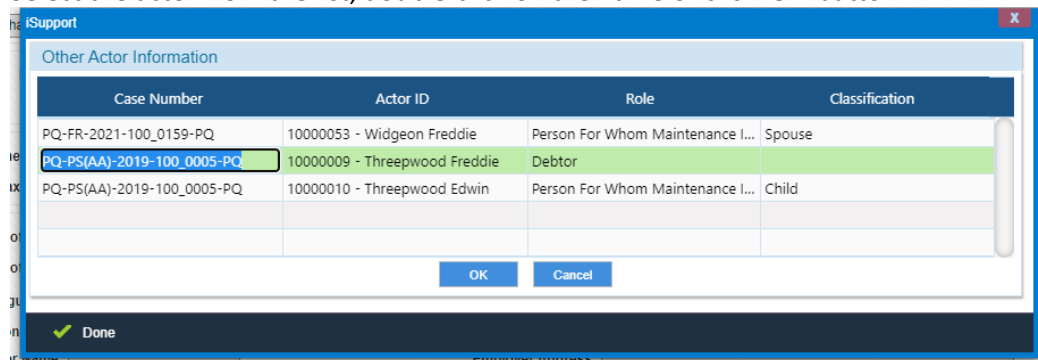
3.14.2 Accessing other actors on same case

On the AHIS, DEMO and FINS screens use the 'magnifying glass' icon in the Select Filters section to view and access other actors related to the case.

1. Double-click magnifying glass icon opens a list of other actors on case.



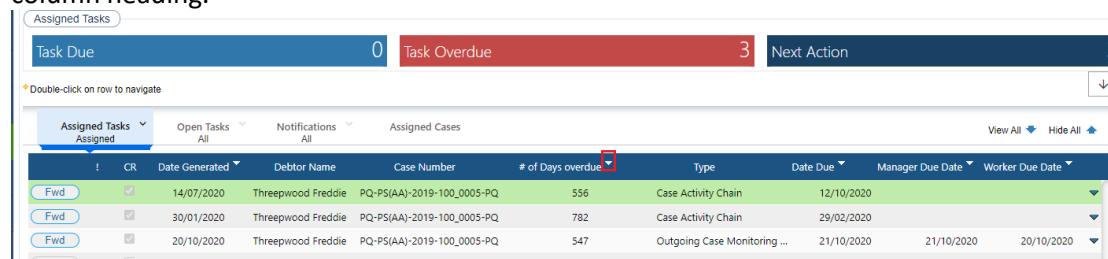
2. Select the actor from the list, double-click on the name or click 'Ok' button.



3. This will display the selected actor's information.

3.14.3 Sorting Work List

On the Work List Action Alerts tab cases can be sorted by Date Generated, # of Days Overdue, Date Due, Manager Due Date or Worker Due Date by clicking on the arrow to the right of column heading.



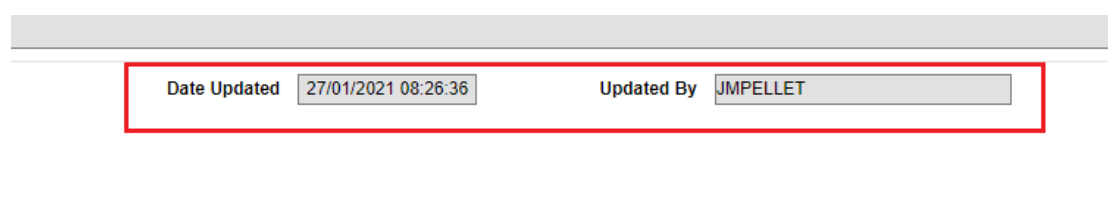
The screenshot shows the 'Assigned Tasks' tab with a summary bar indicating 0 Task Due, 3 Task Overdue, and 3 Next Action. Below this is a table of assigned tasks with columns for Date Generated, Debtor Name, Case Number, # of Days overdue, Type, Date Due, Manager Due Date, and Worker Due Date. The '# of Days overdue' column has a red box around its sorting arrow.

	CR	Date Generated	Debtor Name	Case Number	# of Days overdue	Type	Date Due	Manager Due Date	Worker Due Date
Fwd	✓	14/07/2020	Threepwood Freddie	PQ-PS(AA)-2019-100_0005-PQ	556	Case Activity Chain	12/10/2020		
Fwd	✓	30/01/2020	Threepwood Freddie	PQ-PS(AA)-2019-100_0005-PQ	782	Case Activity Chain	29/02/2020		
Fwd	✓	20/10/2020	Threepwood Freddie	PQ-PS(AA)-2019-100_0005-PQ	547	Outgoing Case Monitoring ...	21/10/2020	21/10/2020	20/10/2020

3.15 Audit Trail in iSupport

iSupport maintains a full audit trail of actions taken on a case. Various screens include fields showing the last date the screen was updated and by which user.

These fields are available in DEMO, AHIS, FINS, FDMO, CCRT, OTHP and all screens accessed by managers or administrators.



The screenshot shows two fields: 'Date Updated' with the value '27/01/2021 08:26:36' and 'Updated By' with the value 'JMPPELLET'. Both fields are highlighted with a red box.

Date Updated	Updated By
27/01/2021 08:26:36	JMPPELLET

The database administrator can access more detailed information on users' actions including screens viewed and actions taken for a particular user.

3.16 Screen acronyms

3.16.1 Case Related Actions

AHIS - Address history	FMDO - Funds monitoring
CASV – Case Overview	ICOR - Transactions
CCRT - Create case	NOTE - Note processor
CPRO - Case processor	NPRO - Notice processor
DEMO - Actor demographics	OTHP - Other party information
EDOC – Electronic Document Overview	SRCH - Search for cases
FINS - Financial summary	WRKL - Work list

3.16.2 Manager Actions

CADS – Central Authority details	RLSA – Role screen access entry
CWRK – Caseworker	USEM – User maintenance

3.16.3 System Tasks

ACTV – Activity reference	EMSG – Error messages
ANXT – Maintain next activity	NREF – Notice reference
BSTL – Batch status log	REFM – Reference code maintenance

iSupport

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4 Case Related Actions

4.1 Overview of creating a case

The CCRT- Create Case screens are used to view an application, create the iSupport case and to view the case after it has been created.

An iSupport case number is composed of:

- the abbreviation of the requesting State (& sub-unit),
- the abbreviation of the requested State (& sub-unit),
- the year in which the case was set up in iSupport,
- a 7 digit running number (3+4 digits), and
- the abbreviation of the State (& sub-unit) in which the iSupport number was issued.

Example: A case involving the requesting State UK (England Wales) and the requested State Germany, created by Germany in 2015, would have the iSupport case number of UK(EW)-DE-2015-123_4567-DE.

4.1.1 Viewing all applications

Navigate to CCRT / View Applications.

To display all applications click the 'New' icon on the toolbar to clear all the fields and then click the 'Find' button. To narrow the search results, use the search fields in Select Filters.

'Completed' status means the iSupport case has been created. 'Pending' status means iSupport case has not yet been created.

- For an outgoing application refer to sec. 4.2
- For an incoming application refer to sec. 4.3

4.1.2 Tips when creating a case

- Before starting to create a new case, go to SRCH – Search for Cases, to ensure a case doesn't already exist for the same actors and same States. If a case exists, refer to 4.4 on how to enter the new application on an existing case.
- When creating a case, there must be at least one person for whom maintenance is being sought and a debtor, known as actors to the case. Once an actor is created, their personal and financial information can be updated at any time using AHIS – Address History and DEMO – Actor's Demographics.
- If you are creating a case for a Modification application, before navigating to CPRO – Case Processor be sure to first create the authority of origin in OTHP – Other Party, and then navigate to FDMO – Funds Monitoring to enter the obligation details. This ensures the forms generated in CPRO will be complete.
- By default the user creating the case becomes the primary caseworker. This can be changed on the CCRT - Manage Case Information screen. A manager can also change

Reference Materials:

[Practical Handbook for Caseworkers](#) under the 2007 Child Support Convention

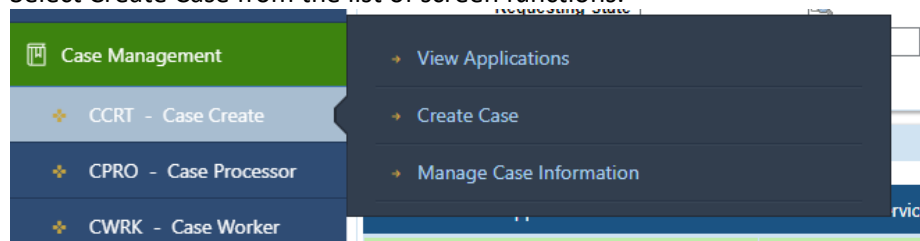
[Practical Handbook for Competent Authorities](#): the 2007 Hague Child Support Convention, the 2007 Hague Protocol on Applicable Law (Maintenance) and the 2009 European Union Maintenance Regulation

the primary caseworker and add a secondary caseworker using CWRK – Caseworker. Refer to 5.2 Assigning a case.

- When creating a case and entering the application details on the Application tab, be sure to carefully check the data. Once you select 'Add' the case ID is created and no further data entry is allowed on that page. If you make a mistake, you will need to 'Close' the application with the error and start again by creating a new application.
- Once a case is created and at a Completed status, no further data entry is allowed in any of the tabs on Create Case. Details of the case can be viewed by accessing CCRT - Manage Case Information. If an actor's information needs to be edited, use DEMO – Actor Demographics or AHIS – Address History.
- Not every country is in CADS – Central Authority Details. If an application is being sent to an uncommonly used country, then a manager or administrator needs to add it to the CADS before creating the case.
- If you are unsure if a State is set up to use e-CODEX, check the CADS – Central Authority Details to see if that State is using iSupport.
- To see an overview of the case, use the CASV – Case Overview. It includes an at a glance view of the applicant, debtor and other actor information; application details; remedies information; and decision information. The screen also allows for quick access to Notes, Funding Monitoring, E-Documents and Recent Messages screens.

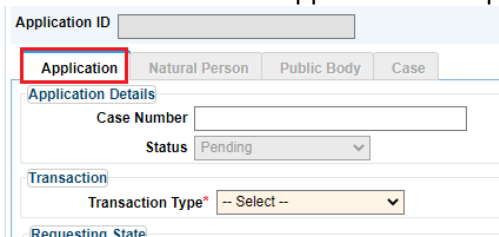
4.2 Creating a case for an outgoing application

1. Navigate to CCRT – Create Case.
2. Select Create Case from the list of screen functions.



4.2.1 Application Tab

3. Enter the details of the application and applicant/public body on the Application tab.

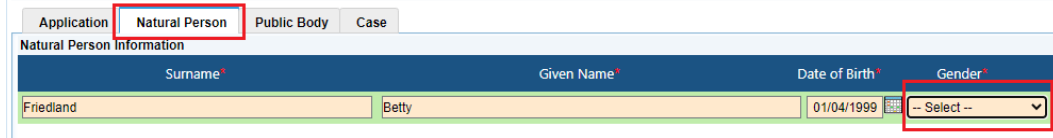


Carefully check that all data entered in the Application Tab is correct before you select 'Add'. Once the case ID is created, the page becomes non-editable.

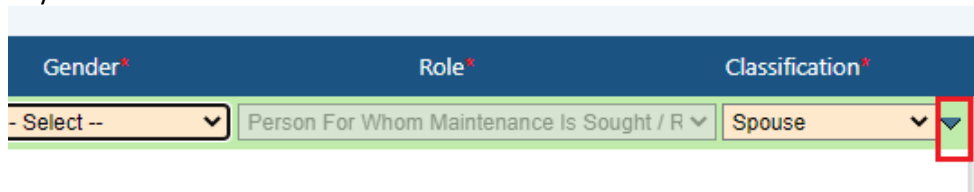
4. Click the 'Add' icon on the tool bar.

4.2.2 Natural Person Tab

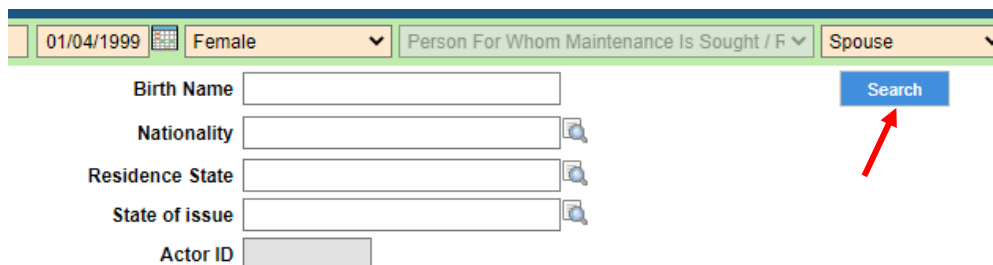
5. Select the Natural Person tab. The applicant will display. Enter the applicant's gender.



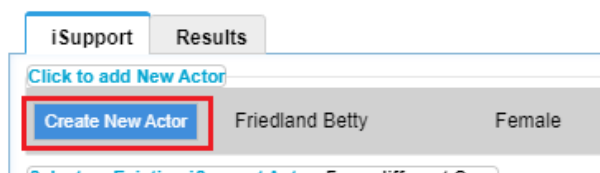
6. Use the arrow on the far right to open all the Natural Person Information fields. Enter any further identifiers.



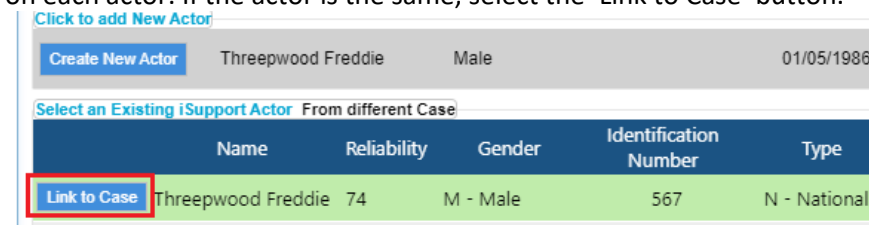
7. Conduct a search to see if the applicant already exists in iSupport by clicking the 'Search' button. A pop-up will display with the search results.



8. View the results displayed:
 - a. If the actor does not exist, 'No matching records found' displays. Click the 'Create New Actor' button.

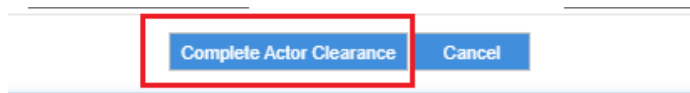


- b. If the actor already exists or if a similar actor exists, the name of the actor and other identifiers will display. Click the right arrow to display more information on each actor. If the actor is the same, select the 'Link to Case' button.

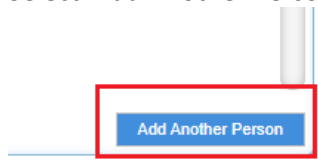


Name	Reliability	Gender	Identification Number	Type
Threepwood Freddie	74	M - Male	567	N - National

9. Select 'Complete Actor Clearance' button, acknowledge the pop-up by selecting 'Yes'. If you edit any of the actor's information, you will be required to search again.



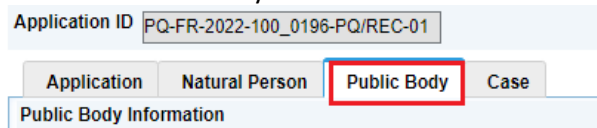
10. Select the 'Save' icon. This saves the actor to the case.
11. Select 'Add Another Person' button to add the defendant or a child to the case.



12. Enter the actor's details in the required fields.
13. Follow steps 6 to 10 to add each actor.

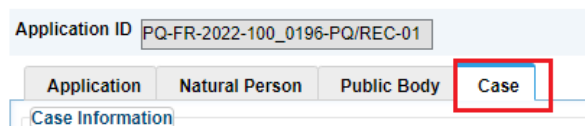
4.2.3 Public Body Tab

14. If appropriate for the case, the Public Body details are entered on the Application tab. If not done previously, the public body needs to be entered as the other party in OTHP – Other Party before creating the case.
15. Select the Public Body tab to review this information.

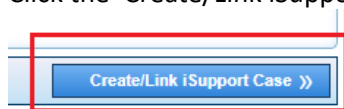


4.2.4 Case Tab

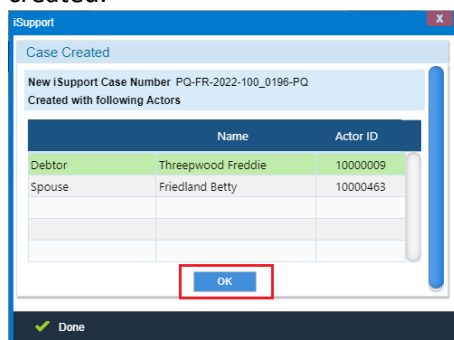
16. Select the Case Tab.



17. Review all case information.
18. Click the 'Create/Link iSupport Case' button.



19. Acknowledge the Case Created pop-up by clicking 'OK'. The iSupport case is now created.



Also see

iSupport

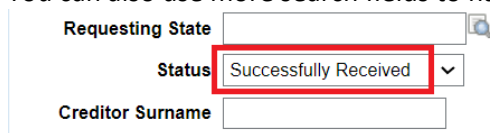
cross-border recovery of maintenance obligations
pour le recouvrement transfrontière des obligations alimentaires

- DEMO sec. 4.8 – to add information about legal aid and payments
- FDMO sec. 4.11 – to enter a decision (remember that a court might have to be created using OTHP sec. 4.10)
- FINS sec. 4.9 – to add financial information about the parties
- CPRO sec. 4.12 – when you are ready to send the case

4.3 Creating a case from an incoming application

If a State uses iSupport, an incoming application is sent via e-CODEX and will be found on ICOR – iSupport Transactions. The incoming application also creates an unassigned notification on WRKL – Worklist. A manager needs to assign it to a caseworker.

1. Navigate to ICOR – iSupport Transactions.
2. Click the 'New' icon on the tool bar to clear any previous case data from the search fields.
3. In Select Filters, use the drop down menu for Status and select 'Successfully Received'. You can also use more search fields to narrow your search results.

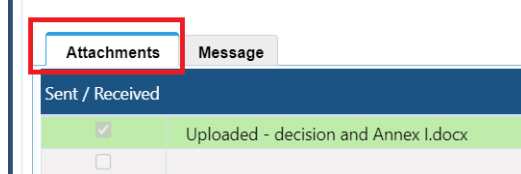


Requesting State

Status **Successfully Received** ▼

Creditor Surname

4. Click the 'Find' button to display all the incoming applications.
 - Any attachments associated with the application will display on the Attachments tab and can be viewed, printed or saved.

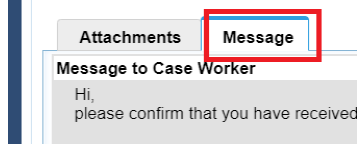


Attachments Message

Sent / Received

✓	Uploaded - decision and Annex I.docx
□	

- Any messages from the sending State will display on the Message tab.



Attachments Message

Message to Case Worker

Hi,
please confirm that you have received

You can also access Incoming Applications on CCRT - View Applications screen. Search by 'Incoming' Transaction Type to view all 'Pending' applications. Remember that any attachments or messages associated with the application are only accessible on ICOR.

5. View the list of all applications. Scroll down to the individual application and double-click on it. This opens the View Applications screen in CCRT – Create Case.
6. In the list, double-click on the application. This opens the Create Case and pre-populates the case information.

4.3.1 Application Tab

7. Check the Application tab to ensure all the required data was received.

4.3.2 Natural Person Tab

8. Select the Natural Person tab. All the actors will be pre-populated
9. Use the arrow on the far right to open all the Natural Person Information fields. Check to ensure all necessary identifiers were received.
10. Conduct a search to see if the actor already exists in iSupport by selecting the 'Search' button. A pop-up will display with the search results.
11. View the results displayed:
 - a. If the actor does not exist, 'No matching records found' displays. Click the 'Create New Actor' button.
 - b. If the actor already exists or if a similar actor exists, the name of the actor and other identifiers will display. Click the right arrow to display more information on each actor. If the actor is the same, select the 'Link to Case' button.
12. Click the 'Complete Actor Clearance' button, acknowledge the pop-up by selecting 'Yes'. If you edit any of the actor's information, you will be required to search again.
13. Do steps 9 to 12 for each actor listed.
14. Click the 'Save' icon in the toolbar.

'Rejected' case status should not be used as it does not comply with Regulation or Convention requirements.

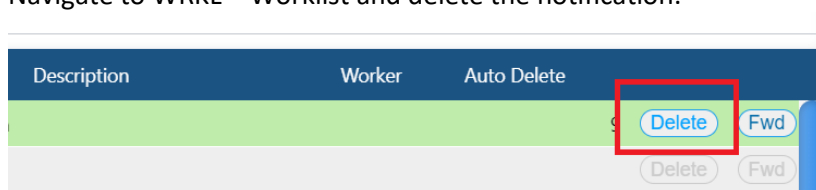
Be sure to check the actors' information in the new application. If it's different, you will need to manually update it or send a note to the other State to verify the information.

4.3.3 Public Body Tab

15. If appropriate for the case, select the Public Body tab and ensure all data was received.

4.3.4 Case Tab

16. Select the Case tab.
17. Click the Create/Link iSupport Case. This creates the case in iSupport.
18. Navigate to WRKL – Worklist and delete the notification.



Also see

- DEMO sec. 4.8 – to add information about legal aid and payments
- FDMO sec. 4.11– to enter a decision (remember that a court might have to be created using OTHP sec. 4.10)
- FINS sec. 4.9 – to add financial information about the parties
- CPRO sec. 4.12 – when you are ready to process the case

4.4 New application on an existing case

If iSupport receives a subsequent application for the same case via e-CODEX, the application will be found on ICOR – iSupport Transactions. The new application also creates a notification assigned to the primary caseworker on WRKL – Worklist.

4.4.1 Incoming application

1. Navigate to ICOR – iSupport Transactions and double-click on the application, this opens the CCRT – View Applications.
2. Double-click on the application. This opens the Create Case and pre-populates all the case information.
3. Review all case information.
4. Select the Case Tab, and link the application to the case.
5. Select the ‘Create/Link iSupport Case’ button. Acknowledge the Case Created pop-up by selecting ‘OK’.
6. The new application is now linked to the existing iSupport case. When viewed on the CCRT – View Application page, it displays the same case number but a different application type:

▼ Double-click on row to navigate

Application ID	Service
PS(CC)-PQ-2019-100_0395-PS(CC)/M...	Modification
PS(CC)-PQ-2019-100_0395-PS(CC)/E...	Establishment

4.4.2 Outgoing application

1. Use Ctrl-c to copy the iSupport case number of the existing case.
2. Navigate to CCRT – Create Case.
3. Select Create Case from the list of screen functions. This displays the Application tab.
4. In the Application Details section, use Ctrl-v to paste the iSupport case number in the Case Number field and select the type of application and the type of form. The State’s information will be populated. Click the ‘Add’ icon.
5. The Natural Person and Public Body (if applicable) tabs will also automatically populate. Additional actors can be added using the “Manage Case information” functionality after the case is created (refer to 4.6).
6. Select the Case Tab.
7. Review all case information.
8. Select the ‘Create/Link iSupport Case’ button.
9. Acknowledge the Case Created pop-up by selecting ‘OK’.

The new application is now linked to the existing iSupport case. When viewed on the CCRT – View Application page, it displays the same case number but a different application type:

▼ Double-click on row to navigate

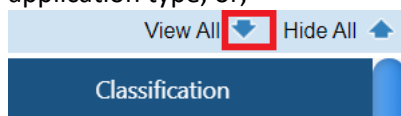
Application ID	Service	Date Submitted
PQ-PS(AA)-2019-100_0005-PQ/MOD...	Modification	22/04/2022
PQ-PS(AA)-2019-100_0005-PQ/REC-02	Recognition And Enforcem...	18/03/2019
PQ-PS(AA)-2019-100_0005-PQ/RSM-...	Request For Specific Meas...	07/03/2019

4.5 Searching for an existing case or actor

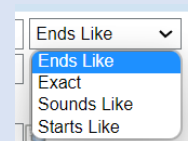
The SRCH – Search for Cases screen is used to find a case or an actor in iSupport. Entering partial or known case information into the search filters will return possible matches.

1. Navigate to SRCH – Search.
2. Click the 'New' icon to clear the sticky data for the current case.
3. In the Select Filter, enter the known case information.
4. Click the 'Find' button.
5. If more than one result is returned and further details are needed to identify the right case:


- a. Click the View All arrow on the right to reveal the other actors related to the case and the application type, or;



Name or partial name is required for a search. If you are not sure of the spelling try the drop down menu by the Surname field:



- b. Click on the downward pointing arrow to view more information about the case.

Sub-Status	Role	Classification
	Debtor	

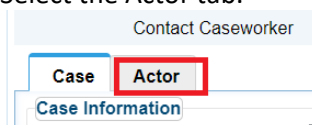
6. When the correct case is found, use the quick navigation box or the vertical menu bar to access the desired screen.

4.6 Adding an actor after case created

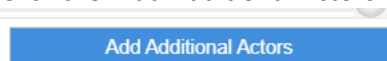
If an actor is missed when creating a case, the actor can be added by using the CCRT - Manage Case Information screen.

4.6.1 Adding a new actor

1. Navigate to CCRT Create Case and select View Applications from the list of screen functions.
2. Find the case by using the select filters feature.
3. Select the case in the list and then click Manage Case Information from the list of screen functions in CCRT.
4. Select the Actor tab.



5. Click the 'Add Additional Actors' button.



6. Enter the actor's information.

An actor cannot be deleted or removed. If an actor is created in error, follow steps 1 to 5 and change the actor's status to 'Inactive'.

Once an actor is added, enter their personal and financial information using AHIS – Address History and DEMO – Actor's Demographics.

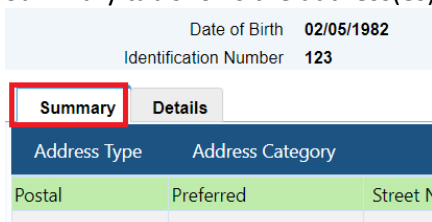
7. Conduct a search to see if the actor already exists in iSupport by selecting the 'Search' button. A pop-up will display with the search results.
8. View the results displayed:
 - a. If the actor does not exist, 'No matching records found' displays. Select the 'Create New Actor' button.
 - b. If the actor already exists, the name of the actor and other identifiers will display. Select the 'Link to Case' button.
9. Select 'Complete Actor Clearance' button, acknowledge the pop-up by selecting 'Yes'.
10. Click the 'Save' icon. This saves the actor to the case.
11. If the application was previously sent to the other State, ensure the other State is notified of the additional actor for the case.

4.7 Viewing, adding or modifying an actor's address

The AHIS – Actor Address History screens are used to view, add or modify an address for a specific actor on a case. The sticky data defaults to the debtor so if updating information for a different actor, the Actor ID must be changed.

4.7.1 Viewing an address

1. From an existing case, navigate to AHIS – View Address History.
2. Summary tab shows the address(es) for the actor.

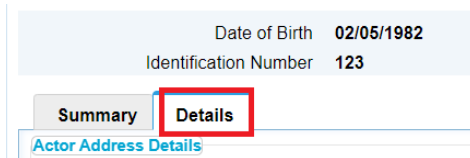


Summary tab view showing actor information and address history.

Actor Information	
Date of Birth	02/05/1982
Identification Number	123

Address Type	Address Category
Postal	Preferred
Street	N

3. Select the Details tab to see further information related to that address.



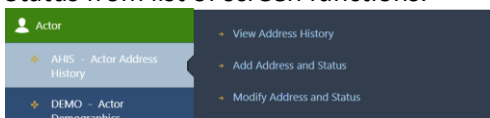
Details tab view showing actor information and address history.

Actor Information	
Date of Birth	02/05/1982
Identification Number	123

Address Type	Address Category
Postal	Preferred
Street	N

4.7.2 Adding a new address

1. From an existing case, navigate to AHIS – View Address History.
2. If an address already exists, select Modify Address and Status from list of screen functions.

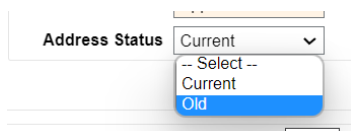


Screenshot of the AHIS screen showing the 'Modify Address and Status' option.

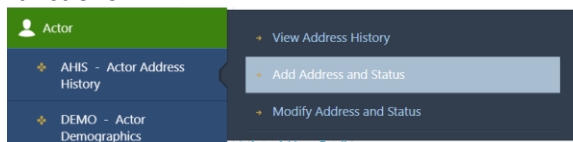
3. Navigate to that address and enter an end date making the address status 'old' and enter a System End Date. Click the 'Save' icon.

Tips:

- When navigating to any of the actor related screens (AHIS, DEMO, FINS) the sticky data defaults to the Debtor's information. Click the magnifying glass icon beside the Actor ID & Name field to access the other actors associated with the case.
- Put a note in the comment field of the AHIS if the child's address is the same as the parent's, instead of doing duplicate data entry of the address.
- Address changes are not automatically sent by e-Codex. If appropriate, you will need to create a note to the other State with an address update.



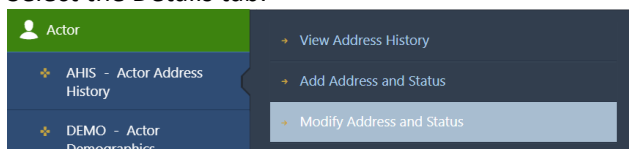
4. Select Add Address and Status from the list of screen functions.



5. Enter the actor's address on the Details tab.
6. Click the 'Add' icon to save the entry.

4.7.3 Modifying an existing address

1. From an existing case, navigate to AHIS – Actor Address History.
2. Select Modify Address and Status from the list of screen functions.
3. Select the Details tab.



4. Make the required changes.
5. Click the 'Save' icon to save the changes.

Limited Access

Use this field if an actor is a high profile person. The actor's personal data will only be accessible by managers.

Non-Disclosure

Use this field if an actor is under threat of domestic violence. This helps ensure:

- corresponding procedures under the Convention and the Regulation are used;
- an actor's contact information is not disclosed on any generated forms; and
- the caseworker is aware the actor's contact information should not be released.

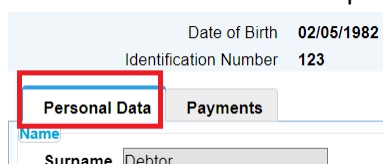
4.8 Viewing or modifying an actor's personal information

The DEMO – Actor Demographics screens are used to view or modify existing personal data and banking details associated with a specific actor on a case, this includes:

- Contact phone numbers
- Demographics (i.e. place of birth, nationality, language)
- Marriage status
- Other information (i.e. Restricted, Non-Disclosure, if the actor has benefited from legal aid or free proceedings, and the name & contact information for a representative)
- Banking information for payments

4.8.1 Viewing an actor's personal information

1. From an existing case, navigate to DEMO – Actor Demographics / View Actor Demographics.
2. Personal Data tab shows the personal information for the actor.



3. Select the Payments tab to see the banking information for the actor.

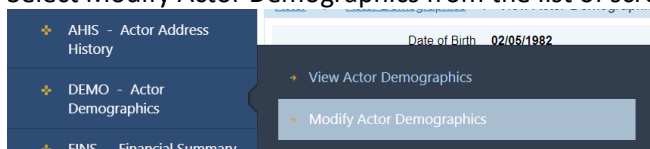
iSupport

cross-border recovery of maintenance obligations
pour le recouvrement transfrontière des obligations alimentaires



4.8.2 Modifying an actor's personal information

1. From an existing case, navigate to DEMO – Actor Demographics.
2. Select Modify Actor Demographics from the list of screen functions.



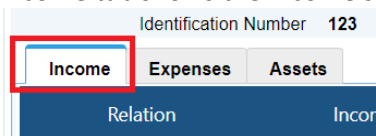
3. Select the Personal Data or Payments tab.
4. Make the required changes.
5. Click the 'Save' icon to save the changes.

4.9 Viewing, adding or modifying an actor's financial information

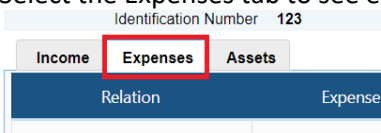
The FINS – Financial Summary screens are used to view, add or modify the income and expenses information of a specific actor.

4.9.1 Viewing an actor's financial information

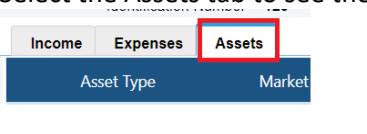
1. From an existing case, navigate to FINS – Financial Summary / View Income and Expenses.
2. Income tab shows the income sources for the actor.



3. Select the Expenses tab to see expenses related to the actor.

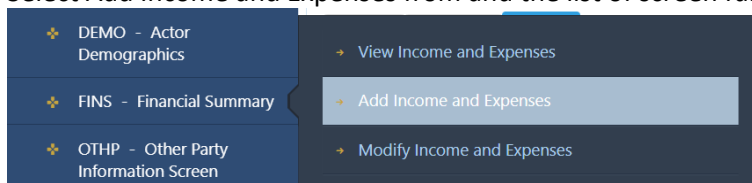


4. Select the Assets tab to see the actor's assets.



4.9.2 Adding an actor's financial information

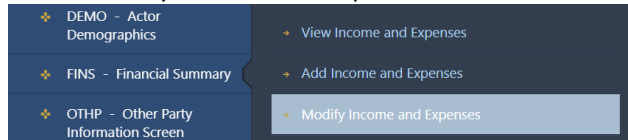
1. From an existing case, navigate to FINS – Financial Summary.
2. Select Add Income and Expenses from the list of screen functions.



3. Select the Income, Expenses or Assets tab.
4. Enter the financial information for the actor.
5. Click the 'Add' icon to save the entry.

4.9.3 Modifying an actor's financial information

1. From an existing case, navigate to FINS – Financial Summary.
2. Select Modify Income and Expenses from the list of screen functions.



3. Select the Income, Expenses or Assets tab.
4. Make the necessary changes.
5. Click the 'Save' icon to save the changes.

4.10 Adding another third party to the case

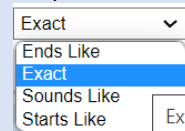
The OTHP – Other Party Information screen is used to search for, view, add and update the other party information details. The other party's record is used to populate fields on other screens, such as the CCRT – Create Case or FDMO – Funds Monitoring to add a decision.

4.10.1 Viewing Other Party Information

1. Navigate to OTHP – Other Party Information.
2. In the Search Filter, click the 'Find' button to display all existing other parties.
3. OTHP Information tab is displayed.
4. Select the appropriate entry and click the down arrow on the far right to view the other party's details.
5. Click the Payments tab to view banking information for the other party.

Tip:

Use the fields in the Search Filter to refine your search results. If you are not sure of the name try the drop down menu by the Name field:



4.10.2 Adding Other Party Information

1. Navigate to OTHP – Other Party Information.
2. Select Add Other Party Information from the list of screen functions.
3. Enter the required information.
4. Click the 'Add' icon in the toolbar.

4.10.3 Modifying Other Party Information


1. Navigate to OTHP – Other Party Information.
2. Select Modify Other Party Information from the list of screen functions.
3. Make the necessary changes.
4. Click the 'Save' icon on the toolbar.

4.11 Adding, managing or monitoring an obligation

The FDMO – Funds Monitoring screens are used to enter the details of a decision for a case, and includes one or more obligations; the payments due; and payments received on a case.

4.11.1 Adding or modifying a decision

1. From an existing case navigate to FDMO – Funds Monitoring / Add/Modify Decision.
2. Select the Decision Reference No. by using the pull-down menu.

Decision Ref No 

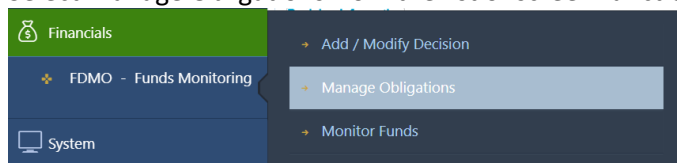
3. Click the 'Find' button.
4. If a decision does not exist, enter the details of the decision. Click the 'Add' icon on the toolbar.
5. If a decision already exists and changes are required, follow steps 2 & 3, then enter the information. Click the 'Save' icon on the toolbar.

Tips:

- Check the 'Maintenance Payable for Group' field if a global amount is due to the applicant and the child(ren).
- More than one decision can be entered, however only the current obligation amount(s) should be entered on the Manage Obligations page. Historical obligation information can be entered in the comment section.

4.11.2 Managing an obligation

1. From an existing case navigate to FDMO – Funds Monitoring.
2. Select Manage Obligations from the list of screen functions.



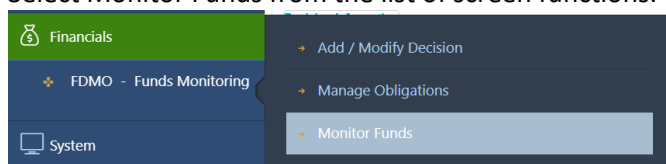
3. Select the Decision Reference No. by using the pull-down menu.
4. Click the 'Find' button.
5. If the obligation does not exist, enter the details of the obligation. Click the 'Add' icon on the toolbar.
6. If the obligation already exists and changes are required, follow steps 2 & 3, then enter the information. Click the 'Save' icon on the toolbar.

Managing an Obligation allows you to enter the:

- amount due and frequency of the obligation
- interest amounts
- arrears

4.11.3 Monitoring funds

1. From an existing case navigate to FDMO – Funds Monitoring.
2. Select Monitor Funds from the list of screen functions.



3. Select the Decision Ref No., Actor and Obligation from the pull-down menus.

Decision Ref No  Actor  Obligation 

4. Click the 'Find' button.
5. Enter the payment received information.
6. Click the 'Save' icon on the toolbar.

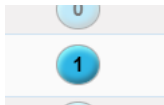
4.12 Starting and moving through an activity list

The CPRO – Case Processor screen uses activity lists to systematically move through the steps or actions required on a case. This screen contains activity lists to manage Convention, Regulation or Neutral cases.

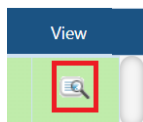
When navigating to this screen the appropriate activity list will display for the case depending on the type of application. The Case Monitoring activity list can be manually opened to manage or track enforcement of a maintenance decision.

4.12.1 Managing case processes

1. From an existing case, navigate to CPRO – Manage Case Processes.
2. Click the blue numbered icon under the Active column (the number displayed reflects the number of same applications) to reveal list of application(s).



3. Under the 'View' column, click the magnifying glass icon.



This reveals the List View tab showing a list of all activities related to the application. If the case was just created, the first action required displays by default.

List View Process History Graphic View Plan View							
Displaying All Activities							
Group	Action	Status	Started On	Due On	Updated On	Days Elapsed	
Application Process	Process Application	IN PROGRESS	22/04/2022	29/04/2022		0	
Record Additional Information	Record Additional Information					0	
E-Codex Package/Print Documents	Generate Application and Transmittal Form and Upload additional Documents					0	
Record Requested State Response	Record Requested State Response					0	
Additional Information Required	Request State request for Additional documents					0	
Record Missing Documents Applicant	Record Missing Documents Applicant					0	
E-Codex Package/Print Documents	Upload Additional Documents for Requested state Request					0	
Record Requested State Response	Record Requested State Response					0	

4. Double-click on the action. This displays the activities that are possible for that step.

Update Activity

You have chosen to update the action - **Process Application**

☒ Ensure That Case Meets Criteria, And has All Required Information ~ Generate Application and Transmittal Form and Upload additional Documents
☐ Provide Additional Request in Application for Recognition of Decision ~ Generate Application and Transmittal Form and Upload additional Documents
☐ Application Does Not Meet Convention Requirements ~ Activity Chain Closes
☐ Application cannot be Processed Because Case Is Missing Information ~ Record Additional Information
☐ Worker Override

5. If appropriate for the step, there may be a form or letter to complete:
 - a. Ensure the documents required are ticked. To view a non-editable version of a document, click on the link to open PDF.

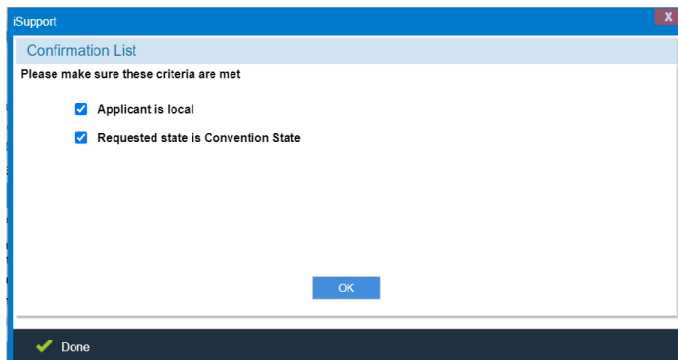
Documents

☒ Letter to Applicant : Case closure - COM11

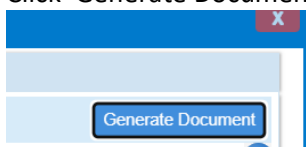
If opened to view, use the 'X' in the upper right corner of the document to close.



- b. Click the 'Save' icon to open the PDF again, this allows for additional information to be entered in the document. If applicable for the step, check the confirmation list and click the 'OK' button.



- c. Click 'Generate Document' to save the changes to the PDF.



Click the 'Save' icon on the toolbar to complete the step.

The List View displays the next required action on the case.

Group	Action	Status	Started On	Due On	Updated On	Days Elapsed
Application Process	Process Application	COMPLETED - Ensure That Case Meets Criteria, And has All Required Information - Generate Application and Transmittal Form and Upload additional Documents	25/04/2022	02/05/2022	25/04/2022	0
Record Receipt of Required Information	Record Receipt of Required Information					0
E-Codex Package/Print Documents	Generate Application and Transmittal Form and Upload additional Documents	COMPLETED - Group Documents And Create E-Codex Package and Print Copies to Mail - Record Requested State Response	25/04/2022	26/04/2022	25/04/2022	0
Record Requested State Response	Record Requested State Response	IN PROGRESS	25/04/2022	20/06/2022		0
Additional Information Required	Requested State request for Additional					0

6. Use the tool under the Process History, Graphic Views and Plan View tabs to track the progress of the case.

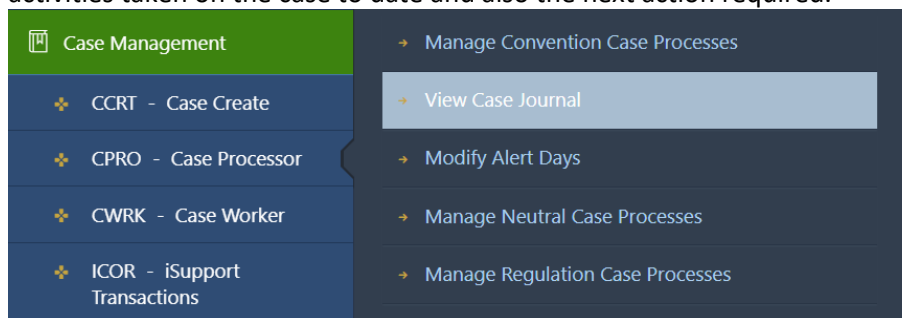
Tips:

- Convention and Neutral forms or letters are automatically sent by e-CODEX when an action is completed or when a PDF is generated, so be sure all the required fields and case data are entered before sending.
- Regulation forms or letters need to be printed off, signed and then uploaded in order to be sent by e-CODEX.
- Use the 'Override Caseworker' radio button to perform any activity a second time; skip an activity and go to the next one; or close an application without completing it.
- Once created, PDF and Word documents can then be found in EDOC. Word documents created locally can be

- PP - Pending: Default status of any outgoing message. Pending status indicates that the message is not yet sent.
- WA - Waiting for confirmation: This status indicates that iSupport is waiting for confirmation of receipt from the other iSupport system.
- SS – Successfully Sent: This status indicates that the message was successfully delivered to and processed by the other iSupport system.
- NR – Message delivered but not loaded into iSupport: This status indicates that the message was successfully delivered but was not processed by the other iSupport system.
- DE - Delivery Error: This indicates that the message delivery got failed. This will happen when the gateway is down on either side, iSupport will try to send the message again.
- ER – Error: This indicates an unknown error.

4.12.4 Viewing case journal

1. From an existing case, navigate to CPRO – Case Processor.
2. Select View Case Journal from the list of screen functions. This displays the list of activities taken on the case to date and also the next action required.

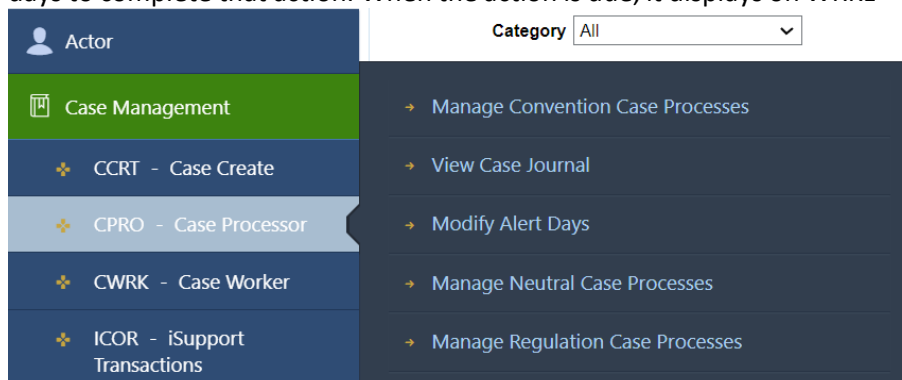


3. Click the Activity link to see further details of the action. If action is required follow steps 3 to 6 in section 4.12.1.

CAT	Subcategory	Activity	Status	Last Post
MN	COMO - Outgoing Case Monitoring...	Ensure Maintenance Decision Has Been Appropriately Enforced	Start	Ensure Maintenance Decision Has Been Appropriately ... by JIMPELLET on 25/04/2022 12:47:49 PM
CI	OREN - Outgoing Recognition and ...	Activity Chain Closes	Complete	Activity Chain Closes by JIMPELLET on 25/04/2022 12:47:49 PM
CI	OREN - Outgoing Recognition and ...	Confirmation of enforcement outcome	Complete--Requested Stat...	Confirmation of enforcement outcome by JIMPELLET on 25/04/2022 12:47:00 PM

4.12.5 Modifying alert days

1. From an existing case, navigate to CPRO – Case Processor.
2. Select Modify Alert Days from the list of screen functions. This displays the number of days to complete that action. When the action is due, it displays on WRKL – Work List.



3. To change the number of days, enter the required number of days in the 'Work No. of Days to Complete' field. The number of days must be less than the number of days set by the manager.

Worker No of Days to Complete*

4. Click the 'Save' icon in the toolbar.

4.13 Viewing, adding or deleting notes on a case

The NOTE – Note Processor screen allows a caseworker to view, add, modify and delete notes on a case. Using the note feature is a way to send a message about the case to another caseworker; to a group of caseworkers with the same role; or to the other State.

Notes created for the case or notes forwarded to another caseworker or role, display as notifications on WRKL – Worklist for 10 days only. If the note is important then a manual task should be created because it does not have an automatic expiry date.

Notes created for another State are sent through e-CODEX and display on ICOR – Transactions under the Message tab for the case. It can be used, for example, to send a quick note to the caseworker in the other State to confirm information such as an address or phone number; or advise that information is being sought from the creditor and a response should follow in the next 10 days. Notes should not be sent to other State until they have received the application and have been able to create a case in iSupport.

Financial notes will display as an assigned task on WRKL – Worklist and can be used, for example, to assign financial tasks to an accountant.

4.13.1 Viewing/Updating all notes

1. Navigate to NOTE – Note Processor. The current case's sticky data will carry over. To start a new search, click the 'New' icon on the toolbar to clear the fields.
2. Use the Select Filters to search for notes assigned to a specific user; notes by a date range; note type; or note status.
3. Use the down arrow to view additional information about when the note was created.

A note's status cannot be changed once the status is at Cancelled, Completed, Processed

Tip:
If you want a note to appear as an notification on the WRKL list be sure to select a caseworker, role or State.

To reply or assign to another caseworker:

1. Click the 'Reply' button.
2. Select a Status and enter a comment. If appropriate assign it to another caseworker or role. Click the 'Save' icon on the toolbar.

To delete:

1. Click the 'Delete' icon on the toolbar.
2. Acknowledge the prompt. A note can only be deleted the same day it was created.

4.13.2 Creating a note

1. Navigate to NOTE – Note Processor. The current case's sticky data will carry over.
2. Select 'Create Note to File' from the list of screen functions.
3. Click either the Worker ID, Role or State radio button. If appropriate, select the Worker's name or Role from the look up feature.
4. Enter the note in the Post Notes box. If the note is to a State, there is the option to include an attachment, click the 'Upload Documents' link.
5. Click the 'Add' icon on the tool bar. This saves the note to the case.

4.13.3 Creating a financial note

1. Navigate to NOTE – Note Processor. The current case's sticky data will carry over.
2. Select 'Create Note to File' from the list of screen functions.
3. Click either the Worker ID or Role radio button. If appropriate, select the Worker's name or Role from the look up feature.
4. Enter the note in the Post Notes box.
5. Click the 'Add' icon on the tool bar. This saves the financial note to the case.

Creating Manual Tasks, see sec. 4.14.3

4.14 Using the worklist

The WRKL – Work List screen is used to manage notification and tasks assigned to a caseworker.

Navigate to WRKL – Work List. The Modify Alerts page is displayed showing Assigned tasks, Open tasks, Notifications and Assigned Cases tabs.

Alerts assigned to your Worker ID will display. If necessary, reset the search filters.

When a case is created, a notification is also created for the first action(s) in the activity list in CPRO – Case Processor, and is assigned to the caseworker who created the case.

4.14.1 Assigned tasks

When navigating to WKRL – Worklist, the Assigned tasks tab is displayed by default. Assigned tasks show when a certain action is required on the case; and when a manual task or financial note is created using NOTE – Note Processor.

To action a task:

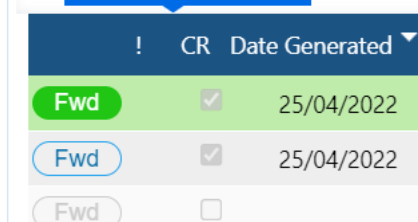
1. Double-click on the case. This will open the NOTE – Note Processor or CPRO- Case Processor screen to show the activity requiring action.
2. Once the action is complete, the alert is removed from WRKL - Work List.

To forward a task:

Tips:

- If a caseworker's name does not appear in the look-up, it is because they have not been assigned to the case. A manager can do this using CWRK – Caseworker.
- Forwarding a task to another caseworker will remove the task from your worklist.
- A case with a 'Pending' status on CCRT- Create Case will not appear on WRKL - Worklist. It will only display once the case has been created and has a 'Completed' status.
- If you have a manager role, you can see the notifications for all caseworkers assigned to your team.
- Notifications involving the same actors are flagged as 'CR' meaning cross-referenced cases.

1. Click the 'FWD' box next to the alert.



2. To the right of the screen, select the caseworker from the look-up feature.

Forward To Worker*

Priority (!) ☐

3. Click on apply.

4.14.2 Notifications

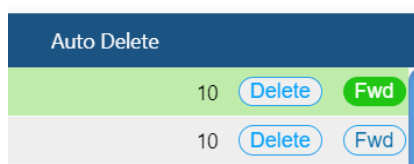
Click on the Notifications tab, this will display notifications assigned to your Worker ID. If necessary, reset the Select Filters.

Notifications show when a certain action is taken on the case; and when a note to file is created using NOTE – Note Processor.

- Refer to Annex A for a list of all notifications.

To forward a notification:

1. Click the 'FWD' box next to the notification.

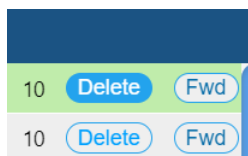


2. To the right of the page, select the caseworker from the look-up feature.
3. Click on apply.

Forward To Worker*

To delete a notification:

1. Click the 'Delete' box next to the alert.



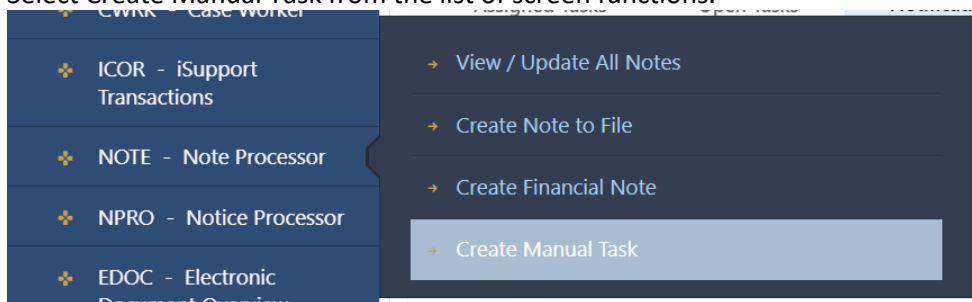
- Acknowledge the prompt to complete the action.

4.14.3 Manual tasks

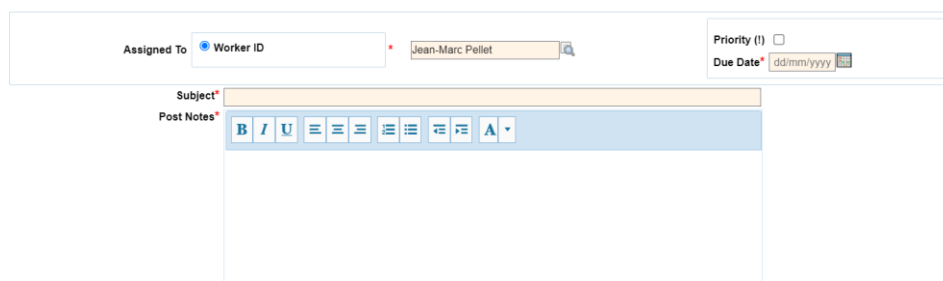
A manual task can be created at any time for the case.

To create a manual task:

- From the WRKL – Worklist, navigate to NOTE – Note Processor. The sticky data for the case will carry over.
- Select Create Manual Task from the list of screen functions.

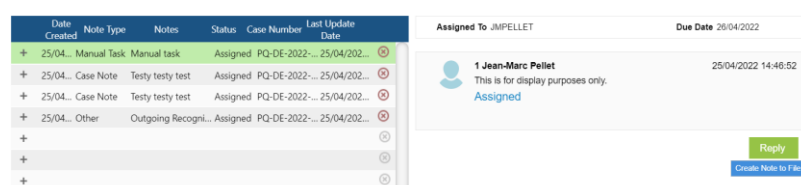


- Enter the Worker ID, Date and details of the task. If appropriate, use the priority indicator (!). This will also display on WRKL – Worklist.
- Click the 'Add' button in the toolbar.



To complete a manual task showing on WRKL - Worklist:

- Double-click on the manual task in the list. This opens Note – Note Processor.
- Click the 'Reply' button to open the details of the task.
- Select the appropriate status and enter a comment.
- Click on 'Add notes'.



4.15 Creating and generating documents

There are various ways to create letters and forms in iSupport. Most documents will populate with data from iSupport, so ensure that all the required case information is entered and kept up to date.

Wherever possible, using the letters and forms within the activity lists in CPRO – Case Processor is recommended. This helps ensure there is an accurate record of actions taken on the case and that alerts are created on WRKL – Worklist when action is required or overdue on the case.

Data or documents sent by e-CODEX cannot be cancelled once sent. You can resend it again, if it needs correcting by using Worker-Override on CPRO – Case Processor.

4.15.1 Documents in the Activity Lists

Most of the required documents will generate when working through the activity lists in CPRO – Case Processor.

Documents may be sent electronically and/or be printed for mailing, depending on the States' requirements.

- See Chapter 4.12 Starting and moving through an activity List.

Documents generated in NPRO- Notice Processor can be sent as attachments to another State in NOTE – Note Processor.

4.15.2 Documents sent by e-CODEX

Depending on the State, documents created in an activity list may be sent electronically by e-CODEX. These transactions can be viewed on ICOR – iSupport Transactions.

1. Navigate to the ICOR – iSupport Transaction. The current case's sticky data will carry over. To start a new search, click the 'New' icon on the toolbar to clear the fields. Use the Search Filters fields to find documents by a requesting State; a requested State; status; or transaction type.
2. Search results will show the status of the e-CODEX transactions.
3. Double-clicking a document on the Attachments tab will open the document.
4. Click the Message tab to view any messages sent using NOTE – Note processor to the caseworker in the other State.

4.15.3 Documents created manually

1. Navigate to NPRO – Notice Processor. Select the appropriate document from the list, or use the Select Filter fields to find the document.
2. Double-click on the document. A pop-up displays with the current case's sticky data.
3. Click on Preview Document button to edit the pre-populated data or Blank Document button to complete all the data entry.
4. Save or print the document.

Documents associated with a step can be added or removed by a manager using ANXT – Maintain Next Activity.

- Refer to Annex B for a list of all documents available in iSupport.

4.16 Viewing all documents related to a case

The EDOC - Electronic Document Overview screen allows the user to view all the documents sent and received for the case. It also allows a user to attach additional documents for the case that were created outside iSupport.

4.16.1 Viewing documents

1. From an existing case, navigate to EDOC – Electronic Document Overview. The current case's sticky data will carry over.
2. Select the appropriate Tab:
 - Attach documents to Case
 - Documents Sent to Other State
 - Documents Received from Other State
 - Other Documents Generated in the State
3. View the list of documents, if available.
4. Click on the document name to open it.
5. If applicable, select the language preference, then click the 'OK' button. The document will display.

4.16.2 Attaching an external document to a case

If you have a document created or received outside the iSupport application, you can upload the document using the Attach Documents to Case tab.

1. Navigate to EDOC – Electronic Document Overview screen.
2. Select 'Attach documents to Case' Tab.
3. Click the 'Upload Documents' link. The Upload Documents window will appear.
4. Click the 'Attachments' button. This will open to your own document directory.
5. Find the document to upload and click the 'Open' button. The document will now appear in the list on the Upload Documents window.
6. Click the 'OK' button to upload the document to iSupport.

4.16.3 Deleting an external document added to a case

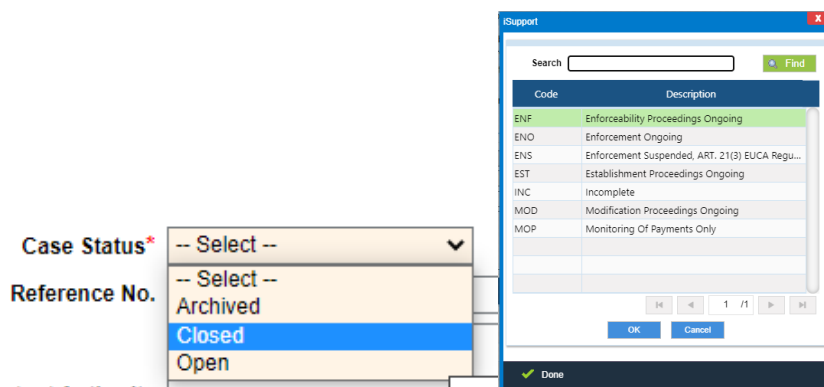
1. Navigate to EDOC – Electronic Document Overview screen.
2. Select 'Attach documents to Case' Tab.
3. Scroll to the document to be deleted.
4. Check the 'Delete' box of the document that was uploaded in error.
5. Click the 'Delete' button on the toolbar.
6. Click the 'OK' button on the confirmation prompt to complete the transaction.

4.17 Closing or archiving a case

A case can be closed if no further action is required. Each State will have its own rules as to when a case should be archived.

4.17.1 Closing

1. Navigate to CCRT – Create Case.
2. Select Manage Case Information from the list of screen functions.
3. Change case status to 'Closed'.
4. Use the Sub-Status look-up to select the reason the case is being closed.



5. Click the 'Save' icon on the toolbar. Case data is no longer editable.

4.17.2 Archiving

1. Navigate to CCRT – Create Case.
2. Select Manage Case Information from the list of screen functions.
3. Change case status to 'Archived'.
4. Click the 'Save' icon on the toolbar. Case data is irreversibly transferred from iSupport to another database. Only the iSupport case number, creation date, actors' full names and birthdates will display in CCRT – Create Case.

5 Manager Actions

5.1 Viewing, adding or modifying a user

The USEM – User Maintenance screen is used by a manager to view, add or modify user accounts in iSupport.

5.1.1 Viewing a user profile

1. Navigate to USEM – User Maintenance / View User Profile.
2. Use the Select Filters to search by User ID, Name or Office.
3. Click the 'Find' button to display the user's information on the Primary tab.
4. Click the Profiles tab to see more user details.

5.1.2 Adding a user

1. Navigate to USEM – User Maintenance.
2. Select Add a User Profile from the list of screen functions.
3. Enter the user's information on the Primary tab.
4. Click the 'Add' icon on the toolbar.
5. Click on Profiles tab to add the user's role and any other details.
6. Click the 'Add' icon on the toolbar. This creates the user in iSupport. The user's password is the same as their user ID just is in all uppercase characters.

5.1.3 Resetting a user password

1. Navigate to USEM – User Maintenance.
2. Select Modify a User Profile from the list of screen functions.
3. Use the Select Filters to search by User ID, Name or Office.
4. Click the 'Find' button to display the user's information on the Primary tab.
7. Click the 'Reset Password' button. Acknowledge the prompt to reset the user's password. The password is reset and is the same as their user ID just is in all uppercase characters. Note: Reset Password button is not available if State is using Multi-factor Authentication.

5.1.4 Modifying a user profile


1. Navigate to USEM – User Maintenance.
2. Select Modify a User Profile from the list of screen functions.
3. Use the Select Filters to search by User ID, Name or Office.
4. Click the 'Find' button to display the user's information on the Primary tab.
5. Edit the user's information on the Primary tab.
6. Click the 'Save' icon on the toolbar.
7. If appropriate, click on Profiles tab and edit the user's information.
8. Click the 'Save' icon on the toolbar.

5.1.5 Viewing users assigned to a manager

1. Navigate to USEM – User Maintenance.
2. Select View Users Associated with Supv/Mngr from the list of screen functions.
3. Use the Select Filters to search by Office, Role or Supervisor/Manager.
4. Click the 'Find' button to display all users assigned to the role or supervisor/manager.

5.1.6 Reassigning users to another manager

1. Navigate to USEM – User Maintenance.
2. Select Reassign User Associated with Supv/Mngr from the list of screen functions.
3. Use the Select Filters to search by Office, Role or Supervisor/Manager.
4. Click the 'Find' button to see users assigned to the role or supervisor/manager.
5. Find the user(s) in the list. Check the 'Reassign' box.
6. At the bottom of the page, select the new supervisor/manager from the look-up feature.

Reassigned to new Supervisor/Manager* 



7. Click the 'Save' icon in the toolbar.

5.2 Assigning a case

The CWRK- Caseworker Assignment screen is used by a manager to assign primary and secondary caseworkers to a case.

5.2.1 Adding a secondary caseworker

1. Navigate to CWRK – Caseworker assignment. The current case's sticky data will carry over.
2. Use the look up feature to select the caseworker's name.

Worker* 
System End Date 


3. Enter an Effective Date.
4. Click the 'Add' icon on the toolbar.

5.2.2 Removing a secondary caseworker

1. Navigate to CWRK – Caseworker assignment. The current case's sticky data will carry over.
2. Find the secondary caseworker on the list.

Worker	Worker Type
Jean-Marc Pellet	Primary
Pellet Jean-Marc	Secondary

3. Enter an End Date.

Worker
System End Date 

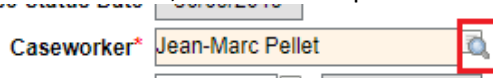
4. Click the 'Save' icon on the toolbar.

5.2.3 Changing the primary caseworker

1. Navigate to CCRT – Create Case. The current case's sticky data will carry over.

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2. Select Manage Case Information from the list of screen functions.
3. On the Case tab, use the look up feature to select a new primary caseworker.



4. Click the 'Save' icon on the toolbar.

5.3 Viewing, adding or modifying a role

The RLSA – Role Screen Access Entry screen allows a manager to view, add or modify the screen access and permissions for specific roles.

5.3.1 Viewing permissions by role

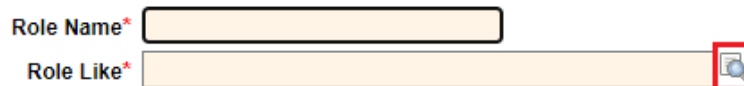
1. Navigate to RLSA – Role Screen Access Entry / View by role.
2. Use the Select Filters to search by role.
3. Click the 'Find' button to display the screen, screen functions and type of access for that role.

5.3.2 Viewing permissions by screen

1. Navigate to RLSA – Role Screen Access Entry / View by screen.
2. Select View By Screen from the list of screen functions.
3. Use the Select Filters to search by screen.
4. Click the 'Find' button to display the roles, screen functions and type of access for that screen.

5.3.3 Adding a new role

1. Navigate to RLSA – Role Screen Access Entry.
2. Select Add Role from the list of screen functions.
3. Enter a Role Name.
4. Enter a Role Like using the look up feature.



5. Click the 'Find' button to display the permissions associated with the role.
6. Change the Role Like and search again, if necessary.
7. Click the 'Add' icon on the toolbar to save the new role.

5.3.4 Modifying a role

1. Navigate to RLSA – Role Screen Access Entry.
2. Select Modify Role from the list of screen functions.
3. Use the Select Filters to search by role.
4. Click the 'Find' button to display screens, screen functions and type of access for that role.
5. Scroll through the list and check or uncheck the 'Accessible' box, as necessary.
6. Click the 'Save' icon on the toolbar to save the changes.

5.3.5 Modifying a role by screen

1. Navigate to RLSA – Role Screen Access Entry.
2. Select Modify Role By Screen from the list of screen functions.
3. Use the Select Filters to search by screen.

4. Click the 'Find' button to display the roles, screen functions and type of access for that screen.
5. Scroll through the list and check or uncheck the 'Accessible' box, as necessary.
6. Click the 'Save' icon on the toolbar to save the changes.

➤ Refer to Annex C for the role access table.

5.4 Viewing, adding or modifying a Central Authority

The CADS – Central Authority Details screens are used to view, add or modify a Central Authority.

5.4.1 Viewing a Central Authority's information

1. Navigate to CADS – Central Authority Details.
2. Use the Select Filters to search by CA State Code.
3. Click the 'Find' button to display the details for the Central Authority.

5.4.2 Adding a Central Authority

1. Navigate to CADS – Central Authority Details.
2. Select Add CADS Information from list of screen functions.
3. Enter the information for the Central Authority.
4. Click the 'Add' icon on the toolbar to create the new Central Authority.

5.4.3 Modifying a Central Authority's information

1. Navigate to CADS – Central Authority Details.
2. Select Update CADS Information from the list of screen functions.
3. Use the Select Filters to search by CA State Code.
4. Click the 'Find' button to display the details for the Central Authority.
5. Make the necessary changes, click 'Save' icon to save the changes.

6 System Tasks

6.1 Viewing or modifying error messages

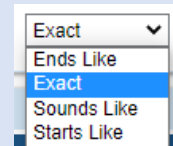
The EMSG – Error Message screen is used by a manager to view and modify system error messages.

6.1.1 Viewing error messages

1. Navigate to EMSG – Error Message / View Error Messages.
2. Use the Select Filters to search for an error type.
3. Click the 'Find' button to display the error ID and description.

Tip:

Use the Description field to refine your search results and select one of the values in the drop down menu:



6.1.2 Modifying error message descriptions

1. Navigate to EMSG – Error Message.
2. Select Modify Error Message Description from the list of screen functions.
3. Use the Select Filters to search for error type.
4. Double-click the appropriate error ID or description to display a pop-up.
5. Change the description in all languages.
6. Click the 'Save' icon on the toolbar and acknowledge the prompt.
7. Click the 'X' to close the pop-up.

6.2 Viewing or modifying case activities and completion dates

The ACTV – Activity Reference screen is used by a manager to view and modify both major and minor activities associated with the activity lists in CPRO. It allows a manager to customize the major and minor activities in the activity lists by:

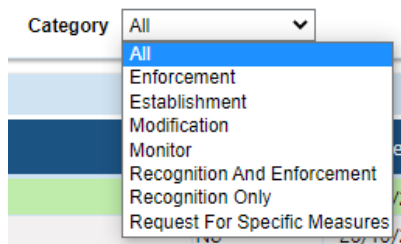
- Removing or adding major activities
- Changing the description of the activities
- Modifying the numbers of days to complete activities

Major activities are the types of applications provided for by international instruments (for instance incoming request for establishment – Regulation, outgoing request for recognition – Convention).

Minor activities are the various steps that make up major activities such as Await Requested State Response, Case Creation, or Send Acknowledgement Form.

6.2.1 Viewing major activities

1. Navigate to ACTV – Activity Reference / View Major Activity. By default all major activities display.
2. Use the Select Filter to refine the search by major activity and category.



3. Click the 'Find' button to display the results in alphabetical order.

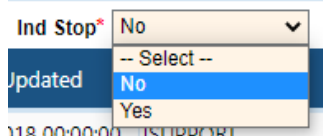
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6.2.2 Modifying major activities

1. Navigate to ACTV - Activity Reference.
2. Select Modify Major Activities from the list of screen functions. By default all major activities display.
3. Use the Select Filter to refine the search by major activity and category.
4. Click the 'Find' button to display the results.
5. To disable (remove) a major activity:
 - a. Select 'Yes' from 'Ind Stop' drop down list. This will remove it from the activity list on CPRO.



If a major activity is not necessary for your Central Authority, change the indicator field 'Ind Stop' field to 'Yes'. This will remove it from the activity list for that remedy.

- b. Click the 'Save' icon.
6. To enable (add) a major activity:
 - a. Select 'No' from 'Ind Stop' drop down list. This will add it to the activity list on CPRO.
 - b. Click the 'Save' icon.
7. To modify the description of a major activity:
 - a. Double-click the appropriate activity to display a pop-up.
 - b. Change the description in all languages.
 - c. Click the 'Save' icon on the toolbar and acknowledge the prompt.
 - d. Click the 'X' to close the pop-up.

6.2.3 Viewing minor activities

1. Navigate to ACTV – Activity Reference / View Minor Activity.
2. Select View Minor Activities from the list of screen functions. By default all minor activities display.
3. Use the Select Filter to search by a specific minor activity.
4. Click the 'Find' button to display the results in alphabetical order.

6.2.4 Modifying the date to complete a minor activity

1. Navigate to ACTV - Activity Reference.
2. Select Modify Minor Activities from the list of screen functions. By default all minor activities display.
3. Use the Select Filter or navigate on the screen to search for a specific minor activity. Use the down pointing arrow to the right of the screen to display more details. Click on the relevant line.
4. To modify the number days to complete an activity:
 - a. Enter number of days in the Convention/Regulation – Days to Complete and/or Manager – Days to Complete fields. By default the number of manager days is the same but can be changed to reflect internal targets.

Convention/Regulations dates are preset in order for the Central Authority to comply with the Convention or Regulation requirements.

System > Activity Reference Screen > Modify Minor Activities						
Minor Activity		Description		Alert Type		
ACFAO		REG: OUT - Record Confirmation of Appeal		A		
Convention / Regulation - Days to Complete*		Manager - Days to Complete*				
90		90				
Minor Activity	Description	Convention / Regulation - Days to Complete	Manager - Days to Complete	Alert Type	Date Updated	
AADDE	CONV: IN - Record Additional Evidence	1	1	Action	26/10/2018 00:00:00	
AARAF	REG: OUT - Record Applicant Response for Right to Appeal Form	7	7	Action	26/10/2018 00:00:00	
ACFAO	REG: OUT - Record Confirmation of Appeal Outcome	90	90	Action	26/10/2018 00:00:00	
ADREC	CASE - Additional documents received	1	1	Action	26/10/2018 00:00:00	
ADSAN	OTH: MONITORING - Advise Sending Authority Case Is Not Being Enforced	1	1	Action	26/10/2018 00:00:00	

- b. Click the 'Save' icon.

6.2.5 Modifying descriptions of minor activities

1. Navigate to ACTV - Activity Reference.
2. Select Modify Minor Activities from the list of screen functions. By default all minor activities display.
3. Use the Select Filter to search for a specific minor activity.
4. Click the 'Find' button to display the results.
5. To modify the description of a minor activity:
 - a. Double-click the appropriate activity to display a pop-up.
 - b. Change the description in all languages.
 - c. Click the 'Save' icon on the toolbar and acknowledge the prompt.
 - d. Click the 'X' to close the pop-up.

6.3 Maintaining documents in the activity lists

The ANXT – Maintain Next Activity screen is used by a manager to view all major and minor activities associated with an activity list, and if appropriate the documents used for those activities. It allows the manager to modify or add letters and forms to a specific step in the activity list, including the ability to add a new recipient.

6.3.1 Viewing next activity

1. Navigate to ANXT – Maintain Next Activity / View Next Activity.
2. Use the Select Filters to search for a major activity.
3. Click the 'Find' button to display all the minor activities associated with the major activity.
4. If appropriate for the activity, related document(s) will also display.

6.3.2 Modifying documents (letter or forms) associated to an activity

1. Navigate to ANXT – Maintain Next Activity.
2. Select Modify Documents Associated from the list of screen functions.
3. Use the Select Filters to search for a major activity.
4. Click the 'Find' button to display all the minor activities associated with the major activity.
5. If appropriate for the activity, related document(s) will also display.
6. To add a document:
 - a. Scroll down to the appropriate minor activity.
 - b. Under the Document ID and Description headings, use the down arrow on the right-hand side to open the document details.

Select Filters

Major Activity* Incoming Enforcement of a Decision - Convention Find

System > Maintain Next Activity Screen > Modify Documents Associated

Sequence	Group	Minor Activity Description	No of Days to Complete	Reason Description	Next Remedy	Next Activity Description
1	GAPPR	PROSA - Process Application	15	Case Documentation is Complete	IENF	SAENF - Send application to competent authority for E...
1	GAPPR	PROSA - Process Application	15	Additional Documents are Required from Requesting S...	IENF	RRESE - Record Requesting State Response
1	GAPPR	PROSA - Process Application	15	Application Does Not Meet Convention Requirements	IENF	RMDCY - Activity Chain Closes
1	GAPPR	PROSA - Process Application	15	Wrong Application has been Initiated	IENF	RMDCY - Activity Chain Closes
1	GAPPR	PROSA - Process Application	15	Case is Not Complete-Respondent or Assets or Income...	IENF	LOCAR - Locate Respondent
2	GRSSR	RRESE - Record Requesting State Response	97	Additional Documents Received	IENF	SAENF - Send application to competent authority for E...
2	GRSSR	RRESE - Record Requesting State Response	97	No Additional Documents Received	IENF	RMDCY - Activity Chain Closes

Delete ☐ ENF03 Convention Annex B - Status of Application Report - (Application for Enforcement)

Select Recipients

Delete	Recipient Type*	Print Method*	Delivery Method*
<input type="checkbox"/>	Other State	Local Print	Regular Mail
<input type="checkbox"/>		-- Select --	-- Select --
<input type="checkbox"/>		-- Select --	-- Select --
<input type="checkbox"/>		-- Select --	-- Select --

☐ MF02 Convention Annex 2 - Acknowledgement form

- c. Enter the Document ID, Recipient Type, Print Method and Delivery Method using the look-up feature.
 - d. Click the 'Save' icon on the toolbar to add the document to the activity.
7. To delete a document:
- a. Scroll down to the appropriate minor activity.
 - b. Check the 'Delete' box beside the document to be deleted.
 - c. Click the 'Save' icon on the toolbar to delete the document.

6.4 Viewing, adding, modifying or deleting reference codes

The REFM – Reference Code Maintenance screen is used by a manager to view, add, modify and delete reference codes that are used in iSupport. It allows a manager to change or add additional values to fields where the user is required to select a value from a pull-down or look-up menu.

6.4.1 Viewing reference codes

1. Navigate to REFM – Reference Code Maintenance / View Reference Code.
2. Use the Select Filters to search by code type and sub type.
3. Click the 'Find' button to display the code values and descriptions for that code type.

6.4.2 Adding a reference code

1. Navigate to REFM – Reference Code Maintenance.
2. Select Add Reference Code from the list of screen functions.
3. Use the Select Filters to search by code type and sub type.
4. Click the 'Find' button to display code values and descriptions for that code type.
5. Enter a Code Value.

Code Value*

Code Description Find

6. Click the 'Code Description' button to display the description pop-up.
7. Enter the code description in all languages.
8. Click the 'Add' icon.
9. Click the 'X' to close the pop-up.

6.4.3 Modifying a reference code

1. Navigate to REFM – Reference Code Maintenance.
2. Select Modify Reference Code from the list of screen functions.
3. Use the Select Filters to search by code type and sub type.
4. Click the 'Find' button to display code values and descriptions for that code type.

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5. Scroll to the appropriate code value.
6. Click the 'Code Description' button to display the description pop-up.
7. Change the description in all languages.
8. Click the 'Save' icon.
9. Click the 'X' to close the pop-up.

6.4.4 Deleting a reference code

1. Navigate to REFM – Reference Code Maintenance.
2. Select Delete Reference Code from the list of screen functions.
3. Use the Select Filters to search by code type and sub type.
4. Click the 'Find' button to display code values and descriptions for that code type.
5. Scroll to the appropriate code value.
6. Check the 'Delete' box.
7. Click the 'Delete' icon in the toolbar and acknowledge the prompt.

6.5 Viewing batch status log and batch errors

The BSTL – Batch Status Log allows a manager to check on the status of a batch executed earlier and also to check for any batch errors.

6.5.1 Viewing batch status log

1. Navigate to BSTL – Batch Status Log / Review Batch Status Log.
2. Use the Select Filters to search by Batch ID, Batch Name, Batch Status and/or Dates.
3. Click the 'Find' button to display a list of batches meeting the search criteria.
4. Double-click on the Batch ID number to display the batch schedule details.

6.5.2 Viewing batch errors

1. Navigate to BSTL – Batch Status Log.
2. Select View Batch Errors from the list of screen functions.
3. Use the Select Filters to search for the batch.
4. Click the 'Find' button to display a list of batches meeting the search criteria.
5. Scroll to the appropriate batch in the list.
6. Use the down arrow on the right-hand side to open up the details about the error.

6.6 Viewing or modifying document attributes

The NREF – Notice Reference screen is used by a manager to view or modify the template of specific document in iSupport. This can include modifying the recipient of the document, where the document is printed (local printing); and how it's delivered (regular mail, certified mail or personal service). It also allows for templates to be changed and templates to be created in different languages.

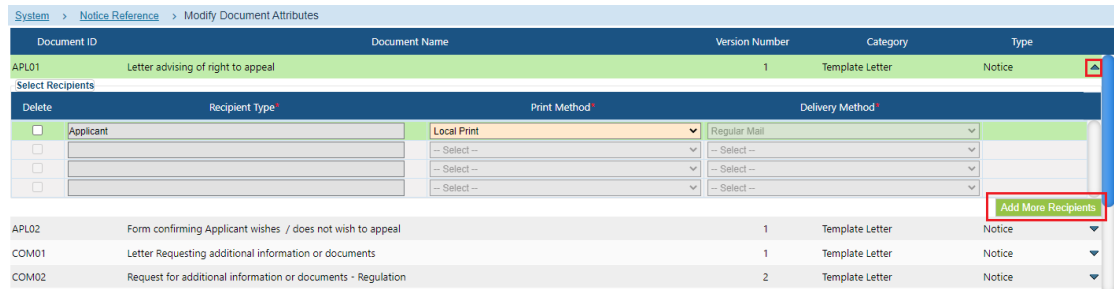
6.6.1 Viewing a document's attributes

1. Navigate to NREF – Notice Reference / Viewing Document Attributes. By default all documents will display.
2. Scroll through the list of documents or use the Select Filters to search for a specific document.
3. Use the down arrow on the right-hand side to open up the details about the document.

6.6.2 Modifying a document's attributes

1. Navigate to NREF – Notice Reference.
2. Select Modify Document Attributes from the list of screen functions. By default all documents will display.
3. Scroll through the list of documents or use the Select Filters to search for a specific document.
4. Use the down arrow on the right-hand side to open up the details about the document.

The version number is the most recent version of the document. iSupport does maintain historical versions in a repository, however NREF only displays the most recent version.



5. Click on 'Add more recipients'.
6. Choose the type of recipient and choose print and delivery methods.
7. Click the 'Save' 'Add' or 'Delete' icon on the toolbar, depending on what action is taken.

6.6.3 Viewing a document's template

1. Navigate to NREF – Notice Reference.
2. Select View Document Template from the list of screen functions. By default all documents will display.
3. Scroll through the list of documents or use the Select Filters to search for a specific document.
4. View the contents of the selected document by double-clicking the row. This displays the document.
5. Click the red 'X' to close the document.

6.6.4 Modifying a document's template

1. Navigate to NREF – Notice Reference.
2. Select Modify Document Template from the list of screen functions. By default all documents will display.
3. Scroll through the list of documents or use the Select Filters to search for a specific document.
4. View the contents of the selected document by double-clicking the row. This displays template editor.
5. Make the text changes and click 'Preview Document'. This will generate the document in PDF format.
6. Click the 'Save' icon to save the changes, or click the red 'X' to close the document without saving the changes.
7. Confirm language the document is to be saved in and click 'Ok'. Document now appears in the list as version number '0'.
8. Add/Remove iSupport logo by using the logo icon in the template editor tool bar.

9. Thoroughly check the document and then use the 'Move to Production' icon to add it to iSupport. Note: only documents with version number '0' can be deleted. Once it's added to iSupport, it cannot be deleted.

7 Annexes

Annex A – List of Notifications

Annex B – List of documents in iSupport

Annex C – Role Access Table

7.1 Annex A – List of notifications

Actions or events that will create a notification on WRKL – Worklist:

1. Case Creation
2. Link of an application to a case
3. New incoming application is successfully received and is still unassigned
4. New Actor added to the case
5. Member Name Modified
6. Non-Disclosure Indicator Removed
7. Member Non-Disclosure Indicator Changed
8. Non-Disclosure Indicator Set to Yes
9. Arrears Adjustment
10. Payment Added
11. Note created to a case and assigned
12. Note created to a case and not assigned
13. New Information Received for this case on ICOR (no application forms)
14. New Application Received for existing case, Case Needs to be Linked

7.2 Annex B – List of all documents in iSupport

Document ID	Document Name	Location of Document	E-CODEX
MF 1	Transmittal Form under Article 12(2)	CPRO	Y
MF 2	Acknowledgement Form under Article 12(3)	CPRO	Y
RMF 1	Acknowledgement Form (Regulation Annex VIII)	CPRO	Y
RMF 2	Notification of refusal or of decision no longer to process an application (Annex IX of Regulation)	CPRO	Y
RMF 3	Regulation Application for Recognition or Declaration of enforceability and Enforcement (Annex VI of Regulation)	CPRO	Y
RMF 4	Regulation application form to obtain of have modified a decision – (Annex VII of Regulation)	CPRO	Y
CVN 1	Abstract of a Decision (Article 25(3) b)) Recommended Forms to Convention – Annex A	NPRO	Y
CVN2	Statement of Enforceability of a Decision (Article 25(1) b))	NPRO	Y
CVN 3	Statement of Proper Notice (Article 25(1)c))	NPRO	Y
CVN 4	Financial Circumstances Form	CPRO	Y
CVN 5	Restricted Information on the Applicant (Financial Circumstances Form)	CPRO	Y
CVN 6	Statement of Arrears	FDMO	Y
CVN 7	Case Closure warning	CPRO	Y
CVN 8	Notice / Request for Case Closure	CPRO	Y
RE 1	Convention Application for Recognition or Recognition and Enforcement	CPRO	Y
RE 2	Convention Restricted Information on the Applicant (Application for Recognition or Recognition and Enforcement)	CPRO	Y
RE 3	Convention Status of Application Report – Article 12 (Application for Recognition or Recognition and Enforcement Article 10(1) a) , Article 10(2) a) , Article 30))	CPRO	Y
RE 4	Regulation Status of Application Report (Application for Recognition, or Recognition and enforcement or Declaration of enforceability and enforcement)	CPRO	Y
RE 5	Transmittal letter to competent authority	CPRO	N
ENF 1	Convention Application for Enforcement of a Decision Made or Recognised in the Requested State	CPRO	Y
ENF 2	Convention Restricted Information on the Applicant - Application for Enforcement of a Decision made or Recognised in the Requested State (Article 10(1) b))	CPRO	Y
ENF 3	Convention Status of Application Report – Article 12 (Application for Enforcement – Article 10(1) b))	CPRO	Y
ENF 4	Regulation Status of Application Report (Application for Enforcement only)	CPRO	Y
EST 1	Convention Application for Establishment of a Decision (including where necessary the establishment of parentage) (Article 10(1) c), Article 10(1) d))	CPRO	Y
EST 2	Convention Restricted Information on the Applicant - Application for Establishment of a Decision (including where necessary the establishment of parentage) (Article 10(1) c), Article 10(1) d))	CPRO	Y
EST 3	Convention Status of Application Report – Article 12 (Application for Establishment of a Decision (including where necessary the establishment of parentage) (Article 10(1) c), Article 10(1) d)) - Incoming	CPRO	Y
EST 4	Convention Status of Application Report – Article 12 (Application for Establishment of a Decision (including where necessary the establishment of parentage) (Article 10(1) c), Article 10(1) d)) - Outgoing	CPRO	Y
EST 5	Transmittal letter to competent authority	CPRO & NPRO	N
EST 6	Regulation Status of Application Report (Application for establishment)	CPRO	Y
MOD 1	Application for Modification of a Decision (Article 10(1) e), Article 10(1) f), Article 10(2) b), Article 10(2) c))	CPRO	Y

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Document ID	Document Name	Location of Document	E-CODEX
MOD 2	Restricted Information on the Applicant	CPRO	Y
MOD 3	Status of Application Report – Article 12 Application for Modification of a Decision (Article 10(1) e), Article 10(1) f), Article 10(2) b), Article 10(2) c))	CPRO	Y
MOD 4	Letter Advising application cannot be processed under the law applicable in the Requested State	CPRO	Y
MOD 5	Transmittal letter to competent authority	CPRO & NPRO	N
MOD 6	Regulation Status of Application Report (Application for modification)	CPRO	Y
NCVN 1	Abstract of a Decision - neutral	NPRO	Y
NCVN 2	Statement of Enforceability of a Decision - neutral	NPRO	Y
NVCN 3	Statement of Proper Notice - neutral	NPRO	Y
REG 1	ANNEX I - Extract from A Decision or Court Settlement In Matters Relating To Maintenance Obligations Not Subject To Proceedings For Recognition Or A Declaration Of Enforceability	NPRO	Y
REG 2	ANNEX II - Extract from a decision or court settlement in matters relating to maintenance obligations subject to proceedings for recognition and a declaration of enforceability	NPRO	Y
REG 3	ANNEX III -Extract from an authentic instrument in matters relating to maintenance obligations not subject to proceedings for recognition or a declaration of enforceability	NPRO	Y
REG 4	ANNEX IV - Extract from an authentic instrument in matters relating to maintenance obligations subject to proceedings for recognition and a declaration of enforceability	NPRO	Y
REG 10	Form Showing the Amount of any Arrears and the Date such Amount was Calculated	NPRO	Y
SM 1	Request for Specific Measures Article 7(1))	CPRO	Y
SM 2	Restricted Information on the Potential Applicant (Article 7(1))	CPRO	Y
SM 3	Request for Specific Measures – Response	CPRO	Y
SM 4	Letter Requesting Specific Measures under Article 7(2)	CPRO	Y
SM 5 A	Request prior approval for Extraordinary Costs for Specific Measures + Consent	CPRO	Y
SM5 B	Potential applicant Consent	CPRO	N
SM6	Transmittal letter Request for specific measures Regulation	CPRO	N
SM7	Request for Additional documents/ information	CPRO	Y
SM8	Annex V Request for specific measures Regulation	CPRO	Y
SM9	Request for specific measures Regulation Annex V	CPRO	Y
SM 10	Transmittal letter – Potential applicant consent	CPRO	Y
COM 1	Letter requesting additional information or documents	CPRO NPRO	N
COM 2	Letter requesting additional information or documents - Regulation	CPRO & NPRO	N
COM 3	Request to State of Origin to complete forms or provide a decision	NPRO	N
COM 5	Letter advising of Status of application or request	NPRO	N
COM 6	Form advising of outcome of application	CPRO & NPRO	N
COM 7	Letter requesting update on status of application or request	CPRO& NPRO	Y
COM 8	Form warning application (and possibly case) is to be closed	CPRO	Y
COM 9	General Caseworker Letter	NPRO	Y
COM 10	General letter – non-caseworker	NPRO	N
COM 11	Letter to Applicant : Case closure	CPRO & NPRO	N
COM 12	Case closure notice	CPRO & NPRO	
COM 14	Transmittal letter to enforcement authority	CPRO & NPRO	N
COM 15	Letter requesting legal aid	NPRO& CPRO	N

Document ID	Document Name	Location of Document	E-CODEX
COM 16	Letter advising debtor of application and requiring voluntary payment	NPRO & CPRO	N
COM 17	Payments details	CPRO & NPRO	
COM 18	Payments transfer	CPRO & NPRO	
COM 19	General Letter to applicant	NPRO	N
COM20	General Letter to defendant/respondent	NPRO	N
COM22	Transmittal letter to legal aid competent authority	NPRO & CPRO	N
COM23	Language neutral notice	NPRO	N
APL 1	Letter advising of right to appeal only	CPRO & NPRO	N
APL 2	Form confirming Applicant wishes / does not wish to appeal	CPRO & NPRO	Y
CUSTOM 1	Form requesting search / locate to find Respondent	NPRO	N
CUSTOM 2	Form initiating parentage testing	CPRO & NPRO	N
CUSTOM 3	Letter requesting search / locate to find Respondent	CPRO & NPRO	N

7.3 Annex C – Role Access Table

SCREEN NAME & FUNCTION	SCREEN ID	CASEWORKER B & REGISTRAR	ACCOUNTANT A	CASEWORKER A & REGISTRAR	REGISTRAR A	MANAGER A	VIEWER	CASEWORKER C	ACCOUNTANT B	REGISTRAR B	CASEWORKER A	MANAGER B	CASEWORKER C & REGISTRAR	CASEWORKER B	CENTRAL ADMIN	CENTRAL CUSTOMER SERVICE	JURISDICTION ADMIN
Modify Major Activities	ACTV	N	N	N	N	N	N	N	N	N	N	Y	N	N	Y	N	N
Modify Minor Activities	ACTV	N	N	N	N	N	N	N	N	N	N	Y	N	N	Y	N	N
View Major Activities	ACTV	N	N	N	N	Y	N	N	N	N	N	Y	N	N	Y	Y	N
View Minor Activities	ACTV	N	N	N	N	Y	N	N	N	N	N	Y	N	N	Y	Y	N
Add Address and Status	AHIS	Y	N	Y	N	Y	N	N	N	N	Y	Y	N	Y	N	N	N
Modify Address and Status	AHIS	Y	N	Y	N	Y	N	N	N	N	Y	Y	N	Y	N	N	N
View Address History	AHIS	Y	Y	Y	Y	Y	N	N	N	N	Y	Y	N	Y	N	Y	N
Modify Documents Associated	ANXT	N	N	N	N	N	N	N	N	N	N	Y	N	N	Y	N	N
View Next Activity	ANXT	N	N	N	N	Y	N	N	N	N	N	Y	N	N	Y	Y	N
Review Batch Status Log	BSTL	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
View Batch Errors	BSTL	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	Y	N
Add CADS Information	CADS	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
Update CADS Information	CADS	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
View CADS Information	CADS	N	N	N	N	Y	N	N	N	N	N	Y	N	N	Y	Y	N
Case Overview	CASV	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	N	Y	N
Create Case	CCRT	Y	N	Y	Y	Y	N	Y	N	Y	Y	Y	Y	Y	N	N	N
Manage Case Information	CCRT	Y	N	Y	N	Y	N	Y	N	N	Y	Y	Y	Y	N	N	N
View Applications	CCRT	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	N	Y	N

SCREEN NAME & FUNCTION	SCREEN ID	CASEWORKER B & REGISTRAR	ACCOUNTANT A	CASEWORKER A & REGISTRAR	REGISTRAR A	MANAGER A	VIEWER	CASEWORKER C	ACCOUNTANT B	REGISTRAR B	CASEWORKER A	MANAGER B	CASEWORKER C & REGISTRAR	CASEWORKER B	CENTRAL ADMIN	CENTRAL CUSTOMER SERVICE	JURISDICTION ADMIN
Manage Convention Case Processes	CPRO	Y	Y	Y	N	Y	N	Y	N	N	Y	Y	Y	Y	N	N	N
Manage Neutral Case Processes	CPRO	Y	Y	Y	N	Y	N	Y	N	N	Y	Y	Y	Y	N	N	N
Manage Regulation Case Processes	CPRO	Y	Y	Y	N	Y	N	Y	N	N	Y	Y	Y	Y	N	N	N
Modify Alert Days	CPRO	Y	Y	Y	N	Y	N	Y	N	N	Y	Y	Y	Y	N	N	N
View Case Journal	CPRO	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	N	Y	N
Assign Workers to a Case	CWRK	N	N	N	N	Y	N	N	N	N	N	Y	N	N	N	N	N
Modify Actor Demographics	DEMO	Y	N	Y	N	Y	N	N	N	N	Y	Y	N	Y	N	N	N
View Actor Demographics	DEMO	Y	Y	Y	Y	Y	N	N	N	N	Y	Y	N	Y	N	Y	N
Manage Documents	EDOC	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	N	N	N
Modify Error Message Description	EMSG	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
View Error Messages	EMSG	N	N	N	N	Y	N	N	N	N	N	Y	N	N	Y	Y	N
Add / Modify Decision	FDMO	N	Y	Y	N	Y	N	N	Y	N	Y	N	N	N	N	N	N
Manage Obligations	FDMO	N	Y	Y	N	Y	N	N	Y	N	Y	N	N	N	N	N	N
Monitor Funds	FDMO	Y	Y	Y	N	Y	N	Y	Y	N	Y	Y	Y	Y	N	N	N
Add Income and Expenses	FINS	Y	Y	Y	Y	Y	N	Y	Y	N	Y	Y	Y	Y	N	N	N
Modify Income and Expenses	FINS	Y	Y	Y	Y	Y	N	Y	Y	N	Y	Y	Y	Y	N	N	N
View Income and Expenses	FINS	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	N	Y	N
View iSupport Transactions	ICOR	Y	N	Y	Y	Y	N	Y	N	Y	Y	Y	Y	Y	N	Y	N
Create Financial Note	NOTE	Y	Y	Y	N	Y	N	Y	N	N	Y	Y	Y	Y	N	N	N
Create Manual Task	NOTE	Y	Y	Y	N	Y	N	Y	N	N	Y	Y	Y	Y	N	N	N
Create Note to File	NOTE	Y	Y	Y	N	Y	N	Y	N	N	Y	Y	Y	Y	N	Y	N
View / Update All Notes	NOTE	Y	Y	Y	N	Y	N	Y	N	N	Y	Y	Y	Y	N	Y	N

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pour le recouvrement transfrontière des obligations alimentaires

SCREEN NAME & FUNCTION	SCREEN ID	CASEWORKER B & REGISTRAR	ACCOUNTANT A	CASEWORKER A & REGISTRAR	REGISTRAR A	MANAGER A	VIEWER	CASEWORKER C	ACCOUNTANT B	REGISTRAR B	CASEWORKER A	MANAGER B	CASEWORKER C & REGISTRAR	CASEWORKER B	CENTRAL ADMIN	CENTRAL CUSTOMER SERVICE	JURISDICTION ADMIN
View and Print Documents	NPRO	Y	Y	Y	N	Y	Y	Y	N	N	Y	Y	Y	Y	N	Y	N
Modify Document Attributes	NREF	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
Modify Document Template	NREF	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
View Document Attributes	NREF	N	N	N	N	Y	N	N	N	N	N	Y	N	N	Y	Y	N
View Document Template	NREF	N	N	N	N	Y	N	N	N	N	N	Y	N	N	Y	Y	N
Add Other Party Information	OTHP	Y	N	Y	Y	Y	N	N	N	Y	N	Y	Y	N	N	N	N
Modify Other Party Information	OTHP	Y	N	Y	Y	Y	N	N	N	Y	N	Y	Y	N	N	N	N
View Other Party Information	OTHP	Y	N	Y	Y	Y	N	N	N	Y	N	Y	Y	N	N	Y	N
Add Reference Code	REFM	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
Delete Reference Code	REFM	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
Modify Reference Code	REFM	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
View Reference Code	REFM	N	N	N	N	Y	N	N	N	N	N	Y	N	N	Y	Y	N
Add Role	RLSA	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
Modify Role	RLSA	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
Modify Role By Screen	RLSA	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
View By Role	RLSA	N	N	N	N	Y	N	N	N	N	N	Y	N	N	Y	Y	N
View By Screen	RLSA	N	N	N	N	Y	N	N	N	N	N	Y	N	N	Y	Y	N
Search for Cases/Actors	SRCH	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	N	Y	N
Add a User Profile	USEM	N	N	N	N	Y	N	N	N	N	N	Y	N	N	Y	N	Y
Modify a User Profile	USEM	N	N	N	N	Y	N	N	N	N	N	Y	N	N	Y	N	Y
Reassign Users Associated with Supv/Mngr	USEM	N	N	N	N	Y	N	N	N	N	N	Y	N	N	Y	N	Y

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SCREEN NAME & FUNCTION	SCREEN ID	CASEWORKER B & REGISTRAR	ACCOUNTANT A	CASEWORKER A & REGISTRAR	REGISTRAR A	MANAGER A	VIEWER	CASEWORKER C	ACCOUNTANT B	REGISTRAR B	CASEWORKER A	MANAGER B	CASEWORKER C & REGISTRAR	CASEWORKER B	CENTRAL ADMIN	CENTRAL CUSTOMER SERVICE	JURISDICTION ADMIN
View a User Profile	USEM	N	N	N	N	Y	N	N	N	N	N	Y	N	N	Y	Y	Y
View Users Associated with Supv/Mngr	USEM	N	N	N	N	Y	N	N	N	N	N	Y	N	N	Y	Y	Y
Modify Alerts	WRKL	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
iSupport Statistics		N	N	N	N	Y	N	N	N	N	N	Y	N	N	N	N	N