IMI Training
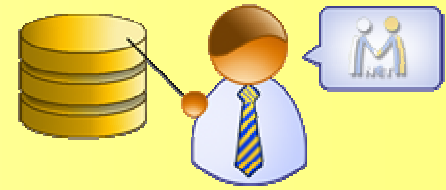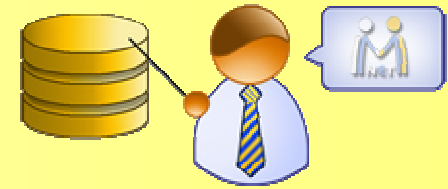
Allocation procedure in IMI

1. Background

2. Workflow when using allocation
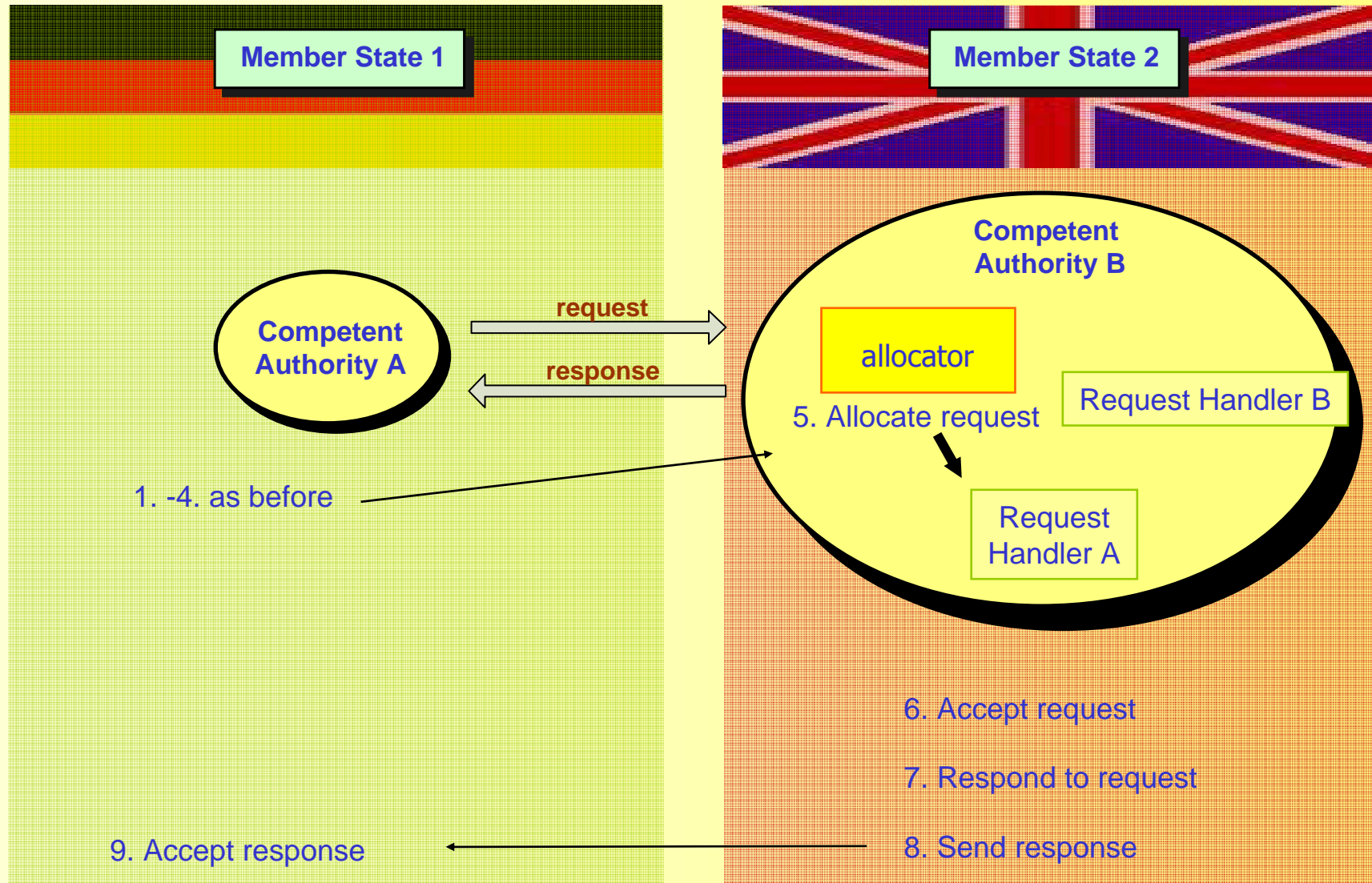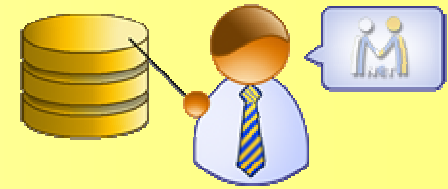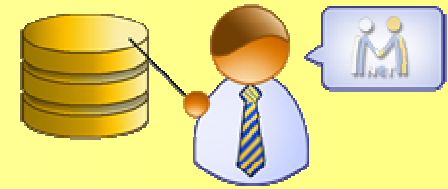
3. Key points

4. Exercise

1. Background

Why an allocation procedure?

- Supports larger CAs with many IMI users or CAs that are responsible for different subject matters (e.g. both doctors and pharmacists)

- Allocators can attribute requests to a specific sub-group of 'request handlers' (e.g. by subject)

- Allocators within IMI Coordinators can attribute requests to 'referral handlers' (e.g. during a referral process)

2. Allocation procedure - workflow

Member State 1

Member State 2

Competent Authority A

request

response

Competent Authority B

allocator

5. Allocate request

Request Handler B

Request Handler A

1. -4. as before

6. Accept request

7. Respond to request

9. Accept response

8. Send response

3. Allocation procedure – Key points

- Every **CA decides for itself** if it wants to use allocation procedure – via legislative settings (LDA)

- If allocation is activated, system will **automatically attribute allocator rights to all users with LDA-rights**. –> LDA can attribute allocator rights to other user(s)

- Allocator sees **new requests** in its action list and receives automatic e-mail

- Allocator **attriobute request to request handler(s)** – request handler(s) can accept/ forward request

- Other 'request handlers' cannot deal with the request and will not see it in their action list

Automatic emails during allocation
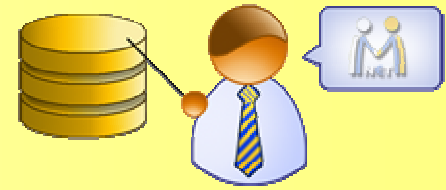
CA uses allocation procedure – automatic E-Mails

- **Before allocation** (e.g. new request)
  - ➢ Automatic E-mail to allocator
  - ➢ Automatic E-mail to in copy to functional e-mail address of CA

- **After allocation**
  - ➢ Automatic E-mail to request handler that has last taken any action on the request
  - ➢ Automatic E-mail to in copy to functional e-mail address of CA

Allocation Procedure – Illustration
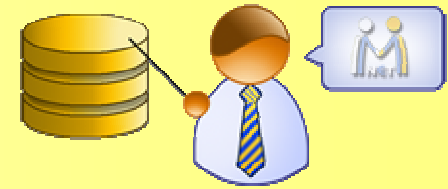
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