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Secondary Access

There are two types of secondary access.

Secondary access - hierarchical and secondary access - absence related.

The set up of both types of secondary access is requested using the **CSUA P30** form. For more information refer to System/Telephony – Set Up Access.

Users have access to up to ten positions, however, security clearance is needed for more than two positions.

Calls route based on primary position and therefore caseworkers willl only have telephony access for their primary position.

Secondary access - absence related

Secondary access - absence related is used when a team leader (TL) or segment manager (SM) is absent and another TL or SM needs to be given access to their team/segment's work in order to manage the work load. This should be set up and left in place to ensure there is access in the event of unexpected absence.

Secondary access - absence related is only for TLs and SMs. If a case worker is absent the TL will need to move the cases from the absent case worker to another case worker or to the team hopper. For more information refer to Work Management.

Secondary access - absence related can only be added or removed by the Primary TL/SM of the caseworker's primary segment following a discussion with the case owning TL to ensure any outstanding work is moved/cleared.

Secondary access - absence related must be reviewed at least every 6 months to ensure access is still required.

Multiple secondary access - absence related requests may be made on a single form, as long as the total number of positions (including primary and all secondary access absence related positions) does not exceed ten.

If there is an unexpected absence that results in no one having access to a users work, an emergency secondary access - absence related request can be made. To do this call the local FLLS team and advise that there is a business critical need for the request. The FLLS team will advise if they have the capacity to make the change urgently and if not they will give you a time scale for completion. You still need to send a completed **CSUA P30** after the phone call for audit purposes.

Secondary access - hierarchical

Secondary access - hierarchical is used when access to another segment higher up in the casegroup hierarchy is needed e.g. The Judicial Review team needs enforcement work to be completed. A discussion needs to take place between the judicial review and enforcement TL/SM. The enforcement TL/SM is responsible for completing the CSUA P30 form. A member of the enforcement team is given secondary access - hierchical to complete the work on behalf of the judicial review team. Once completed, the judicial review TL/SM will reassign/move the work from the caseworker, contact the enforcement TL/SM and ensure that a CSUA P30 is completed to remove the secondary access. The caseworker will then return to the enforcement team.

This type of access should only be used in the following Case owning segments above enforcement in the case group hierarchy;

Special client records	FS_GB_CENOP_000_SPECIAL CLNT
Judicial review	FS_GB_CMEXF_000_JUD REV
Escalated complaints (complaint review/ICE/PHSO)	FS_GB_CMEXF_000_ESCAL COMP
Appeals	FS_GB_CMEXF_000_APPEALS

Secondary access - hierarchical should not be applied in others segments in any other circumstances. While requests for secondary access - hierarchical to support functionally unique segments should be avoided

Secondary access - hierarchical can only be removed by the line manager of the Team Leader or Segment Manager.

Requests for secondary access - hierarchical positions must be submitted one at a time.

When a user no longer requires secondary access - hierarchical, it is vital that all work held by that user is either moved back to the hopper or assigned to another user. Failure to move the work prior to removing access will result in the work being lost. The TL/SM

of the two segments involved need to ensure this has taken place prior to the submission of the **CSUA P30** requesting removal of secondary access.

Accessing positions

1. In 2012 system navigate to **Tools** then **User Preferences** then **Change Position**.

   In this screen you will see all positions available to you. Highlight the line showing the position you wish to have access to and select the **Change Position** button.

   - If you have secondary access for the purpose of hierarchy go to **step 2** (Secondary access - hierarchical).
   - If you have secondary access for the purpose of absence go to **step 3** (Secondary access - absence).

Secondary access - hierarchical

2. Return to the **Service** tab. The service requests (SRs) shown will now be for the position you selected and you will have the system permissions associated with the new position.

   If a caseworker is assigned to multiple positions through using secondary access, when viewing **My Service Request** they will only see open service requests assigned to their specific position. E.g. if a caseworker logs into their primary position the user will only see service requests assigned to this position. When the caseworker changes position the **My Service Request** view will only display the service request assigned to them in their secondary position. If a caseworker with multiple positions wishes to see all service requests assigned to them across positions select **Personal SR Segment List View** to display all open service requests assigned to them. Caseworkers should **not** complete service requests in this view.

Secondary access - absence

3. Return to the **Work Management** tab. The caseworkers shown in this view will now be available for the team leader position that has been selected.

   You can only assign work from the team hopper to caseworkers in that team. If you wish to assign work to a caseworker in a different team you must first send the case back to the segment hopper, return to your primary position (or position you want to move the case to if you have more than two positions) and reassign the case from there.
   Team leaders are only able to see service requests or activities that are assigned to the team they are accessing.

Content Editor

System/Telephony – Set Up Access

Terminology Changes

Work Management