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Special Client Records - Request Temporary Access

The special client record (SCR) team deal with nationally sensitive cases covering the entire lifecycle of a case.

The purpose of this procedure is to provide guidance on how to correctly obtain temporary SCR access. Temporary access may be needed to carry out the following:

- To view a sensitive contact
- To allow an SR with a sensitive contact to be routed to the SCR segment
- To route an SR to the SCR team allowing them to carry out finance specific actions against a sensitive contact

Where the SCR team require additional support from CFAT whilst completing finance activities they should email their request to **CM 2012 Scheme CFAT Banking & Accounting**.

Requests for temporary access will be granted on an individual basis via the SCR manager, both approval and the removal of temporary access will be closely monitored. The duration of SCR access is for a limited time and should be specified on the Temporary request form [CSUA150](#).

When access is granted to allow an SR with a sensitive contact to be routed to the SCR segment and the SR Status has been set to Pending Assignment, the work allocation framework will route the work item to the SCR segment hopper

The caseworkers on the SCR team will process the SRs as required.

Once temporary access has expired, the caseworker will be informed by their team leader to log off the system and back on, this will ensure the access has been removed.



Temporary SCR access may be required for the following reasons:

- To view a sensitive contact
- To allow an SR with a sensitive contact to be routed to the SCR segment
- To route an SR to the SCR team allowing them to carry out finance specific actions against a sensitive contact

Request Temporary SCR Access

1. When you require temporary SCR access, complete the Temporary request form [CSUA150](#) with the following details:

- **Staff number** - Once you select **Search** your name and contact details will populate on the form
- **Team**
- **Grade**
- **Area**
- **Requested duration of access**
- **Service Request ID**
- **Client name (if required)**
- **SCIN (if required)**
- **NINO (if required)**
- **Further identifiable details**
- **Justification / Reason for Access**

2. Once complete email this to your team leader (TL).

Team leader actions

3. When you receive the [CSUA150](#) form you will need to check the form has been completed accurately.
4. Once you are satisfied that the form is correct, enter your Name and Contact details onto the form and send this to the SCR manager by email to **CM 2012 Scheme Special Client Records**.
5. The SCR manager will then review the form and where approved, they will send it to Front Line Live Support (FLLS).
6. If the form is rejected by either the SCR manager or FLLS, it will be returned to you clearly stating the reason for the rejection.



Note, if the form is rejected, you will need to inform the caseworker of the reason for the rejection. If the caseworker still requires temporary access, they will need to complete a new form.

7. Once FLLS have approved the form, the caseworkers user profile will be updated to allow temporary SCR access.
8. You will be notified immediately either by telephone or email once temporary access has been granted. Note how long the temporary access has been granted for.
9. Inform the caseworker when access has been granted, set your own personal reminder to inform the caseworker to log off and back on the system once their access has expired, as FLLS will not inform you when this has happened. You must witness the caseworker taking the log off action.



If you receive notification from the caseworker before their access has expired that they need their access extended or they have completed their actions, contact FLLS to either request extended access or remove the access by email to **CMG User Provisioning**.

Caseworker actions

10. Once you have been informed by the TL that your access has been granted, log off the system and back on to enable the access then take the following actions. If the access is to:
 - **View a sensitive contact** - Gather data required and go to **step 12**
 - **Allow an SR with a sensitive contact to be routed to the SCR segment** - Link the SR to the case and go to **step 11**
 - **Route an SR to the SCR team allowing them to carry out finance specific actions against a sensitive contact e.g. reassign payment/clear online suspense account (Banking and accounting team)** - Go to **step 11**

When completing any actions, if you require extended access you will need to inform your TL before your access has expired. Your TL will contact FLLS to request this.

11. Associate the case/contact to the SR and update the **Status** to **Pending Assignment**. The work allocation framework will then automatically route the SR to the SCR team segment. From the main SCR hopper either the TL or SCR manager can assign the SR to a caseworker.



If you complete your actions before your access has expired, inform your TL who will contact FLLS to remove this.

12. Once your access has expired, your TL will advise you to log off the system and back on, this will ensure that your access has been removed.

Related Items

[BaNCS - Control And Assurance](#)

[Chargeback - Debit/Credit Card](#)

[Create Cost](#)

[Payment From - Investigate/Escalate](#)

[Payment - Reassign](#)

[Receipting - Manual](#)

[Secondary Access](#)

[Suspense Account - Clear Online](#)

[System/Telephony - Set Up Access](#)

