



Exceptional Case - Receipts And Payments Tool - Add/Remove User

Initially there may be a small number of cases that cannot be set up or supported on CMS2012. There are two types of cases identified for exceptional case handling:

- Type one cases cannot be started on CMS2012 as one or more case participant has no national insurance number (NINO) or child reference number (CRN)
- Type two cases are initially on CMS2012 and due to an incident that prevents progression these cases are moved to 2012 exceptional case handling solution

Payment received by the exceptional case handling team is entered on the off system receipts and payments tool.

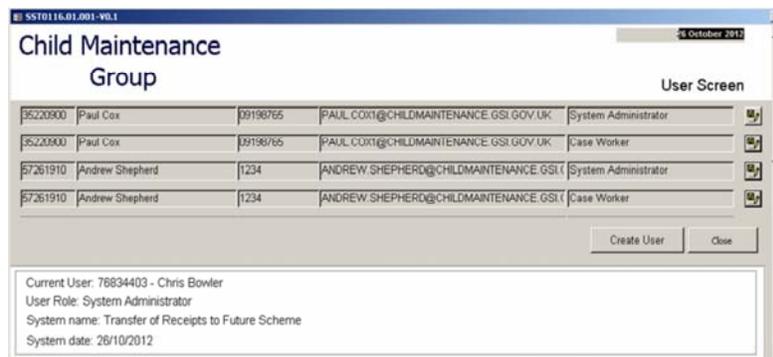
This procedure explains the steps required for the team leader on the exceptional case team, to add or remove caseworker access to the Receipts and Payments tool.

ECHT caseworkers must use the off system link [2012 scheme letter](#), [Exceptional case - letters \(outbound\)](#) and the relevant procedure to identify and issue the correct notifications.

For more information on exceptional case handling and the receipts and payments tool refer to [Exceptional Case Handling - Overview](#) and [Exceptional Case - Receipt Payment and Reports](#).

Add caseworker/user

1. To add a user to the receipts and payments tool, log into the system (for details of logging on refer to [Exceptional case - receipt and reports](#)). From the **User role** dropdown, select **Administrator**.
2. From the **main menu** select **Administrator menu**, and select **Maintain Users**, the User screen appears:



3. This screen shows a list of each user on the system, to add a user select the **Create user** button, the Create user screen appears:

4. Enter the following information for the new user:
 - **Staff ID** = up to nine numeric characters
 - **User Name** = this pre-populates when the staff ID is entered
 - **Phone Number** = enter this manually
 - **E-Mail** = this pre-populates when the staff ID is entered
5. Select **Save** to confirm you wish to add this user. A message displays stating that you have successfully added the new user record to the database. Select **Ok** to add the user profile, the Grant user profile screen appears.
6. The Staff ID field is pre-populated, from the **Role** dropdown field select **Case Worker**.
7. Select **Grant** then **Close** to go back to the User screen.
- 8.

If adding more users, repeat steps 3 – 7 until complete. Once complete, select **Close** from the User screen to end the process.

Remove caseworker/user

9. To remove a user from the receipts and payment tool, log into the system and from the **User role** dropdown, select **Administrator**.
10. From the main menu select **Administrator menu** and select **Maintain Users**, the User screen appears:

Staff ID	Name	Phone Number	Email	Role
35220900	Paul Cox	09198765	PAUL.COX1@CHILDMAINTENANCE.GSI.GOV.UK	System Administrator
35220900	Paul Cox	09198765	PAUL.COX1@CHILDMAINTENANCE.GSI.GOV.UK	Case Worker
57261910	Andrew Shepherd	1234	ANDREW.SHEPHERD@CHILDMAINTENANCE.GSI.GOV.UK	System Administrator
57261910	Andrew Shepherd	1234	ANDREW.SHEPHERD@CHILDMAINTENANCE.GSI.GOV.UK	Case Worker

11. Select the **Edit//Delete record icon**, to the right of the list of users within the User Screen, the Edit user screen appears:

The screenshot shows a web application window titled "Child Maintenance Group" with the date "31 October 2012" and "Edit User Screen". The form contains the following fields:

Staff ID	35220900
User Name	Paul Cox
User Role	Case Worker
Phone Number	09198765
E-Mail	PAUL.COX1@CHILDMAINTENANCE.GSI.GOV.UK

Below the form are four buttons: "Add new profile for this user", "Revoke Profile", "Save", and "Close".

At the bottom, a box displays system information:

Current User: 76834403 - Chris Bowler
User Role: System Administrator
System name: Transfer of Receipts to Future Scheme
System date: 31/10/2012

12. Select **Revoke Profile**, a message displays stating that the User profile has been deleted, select **OK** and then **Close**.

[Exceptional Case - Allocation And Payment](#)

[Exceptional Case - Gateway](#)

[Exceptional Case - Information Gathering](#)

[Exceptional Case - Overview](#)

[Exceptional Case - Receipt Payment And Reports](#)