



Security set up

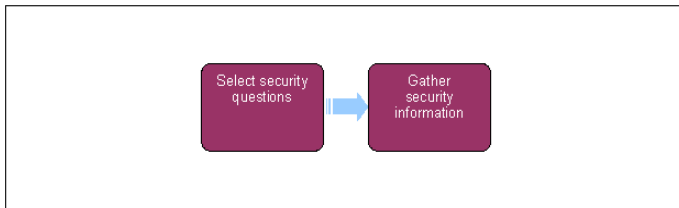
This procedure will take you through collecting the personal identification number (PIN) and a password for a client or a client representative. We need this information so we can carry out security checks and make sure that we can confirm the identity of a caller.

The process will be completed by the caseworker who has ownership of the case.


The process will usually be completed for the applicant and the other party during the application stage of a case, as it is mandatory for this information to be held in order for a client or representative to speak to the Child Maintenance Group (CMG). It can also be launched at a later stage for any client or client representative if this information was not gathered at the application stage.

A desk aide has been created to help caseworkers and is available here: [Security Desk Aide](#).

For more information refer to the Policy, Law and Decision Making Guidance 



 When speaking to clients always use the new terminology. For more information refer to [Terminology Changes](#).

 Manually built CSA Arrears Only cases will not have a TAM account created. Raise an incident with AAC.

Select Security Questions

The following is completed during the application process.


1. Select the **Security Questions** tab from the **Contacts List** screen.
2. Select the **Create** check box.

Gather Security Information


3. You will be presented with the **Security PIN** and QA applet. Collect the information from the client/representative.
 - Security PIN – this is seven digits long and only contain numbers, it can not be all zeros
 - Special Customer Password

Clients are not required to provide information to complete the seven memorable questions. Input an X in these fields to progress the case:

- Memorable Name - X
- Memorable Teacher - X
- Memorable Place - X
- Memorable Singer - X
- Memorable Date - X
- Memorable Event - X
- First School - X

 Clients should be made aware that inappropriate language cannot be used for setting a password. If a client refuses to set a password then they must be advised that information relating to their case cannot be discussed with them.

4. This information is necessary for security checks to confirm the identity of a caller. For more information refer to [Security Check](#)

 Make the client aware that they are required to remember these details, and not to share them with others. Failure to correctly answer the security questions when contacting the Child Maintenance Group (CMG) could result in the client having to wait to receive a letter to reset their security details. Until the security details are reset we won't be able to deal with any requests by telephone.

Once you have updated the system with the security questions ask the client for what time of day would be the most convenient for us to call if needed in the future. Record this on the system at contact level by creating an **Activity - Record** with a future a start date of 01/01/2035. Record the preferred contact times within the description field and set the activity **Status** to **Not Required**. This activity will always appear at the top of the activities tab making it easy for caseworkers to locate the preferred times.

Default Security

5. Where we have attempted contact the client and have received no response, you will need to set default responses until the client contacts the child maintenance group (CMG). The default responses are:

- Security PIN - 1234567
- Special Customer Password - Apply Defaults
- Memorable Name - X
- Memorable Teacher - X
- Memorable Place - X
- Memorable Singer - X
- Memorable Date - X
- Memorable Event - X
- First School - X



If the customer refuses to set up security information set these defaults to ensure case progression. Without the customer setting up actual security questions we won't be able to discuss their case with them over the phone until this information is provided. Make sure the client is aware of this.

6. Once completed select **Submit**. On completion of this process **Collect Security Questions** will be marked as **Done** on the activity plan.

[Application - Child In Scotland](#)

[Application - Edit Existing](#)

[Application - Receiving parent](#)

[Application - Paying parent](#)

[Change - Security Details](#)

[Gather Paying Parent Information](#)

[Incident Management - Manage Incident Locally](#)

[Security Check](#)

[Terminology Changes](#)