

# CRIB SHEET - INVOLVEMENT BASED SECURITY

## What is Involvement Based Security?

Involvement Based Security is an area of Swift that can be used to control user access to specific areas of a client's Swift record.

A series of tests/criteria are set up in Swift against selected screens, e.g. Contact Notes and Hazards. When Involvement Based Security is applied to your login, Swift looks at which teams you are part of in Swift and restricts your access to Contact Notes and Hazard screens for any client if you do not meet the criteria of the tests. In order for you to access these screens you may need to record yourself as an involvement on a client's record and to close that involvement when appropriate.

## What tests/criteria does Swift look at in permitting or denying you access to areas of a client's record?

You will only be able to access Contact Notes and/or Hazards for a client in Swift if you meet the following criteria:-

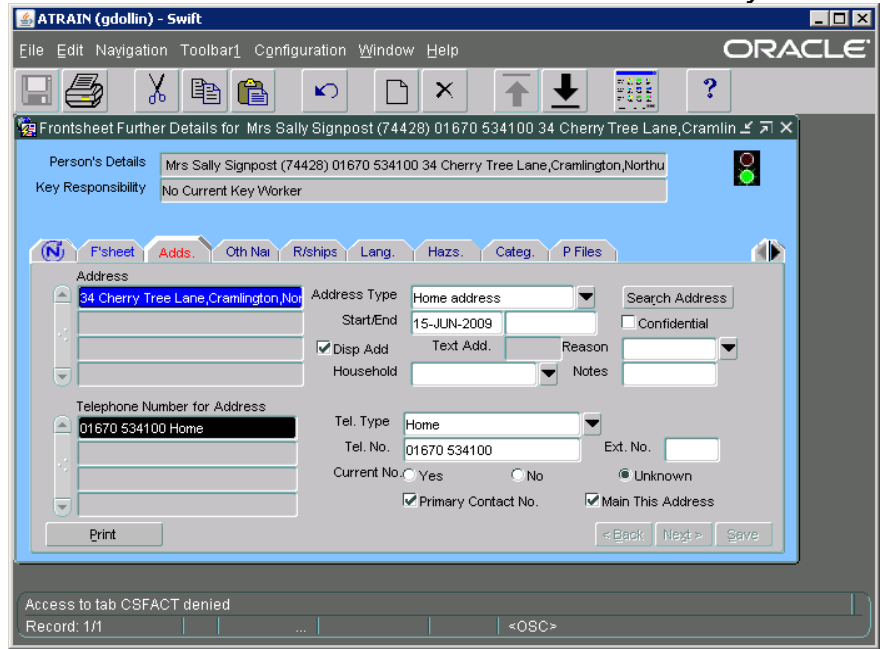
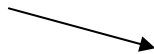
- You are the key worker.
- You are a member of the key worker's team.
- You are a member of the key team.
- You are recorded as an involved worker on the involvements screen.
- You are a member of an additional involved team.
- You are the team manager of an involved worker.

## Accessing Relevant Screens?

- Where you do not meet this criteria you will be not be permitted to access these screens.
- Where you try access Hazards screen for a client from a screen within further details of Frontsheet and you do not meet the criteria, you may see the message displayed at the bottom left of the screen, as in the example overleaf.

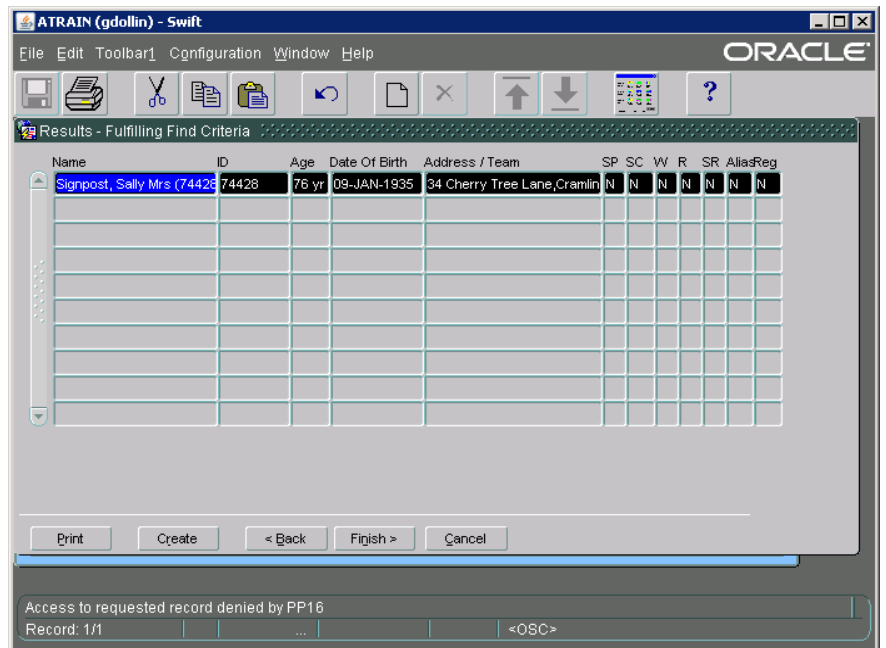
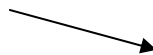
## Crib Sheet – Involvement Based Security

Access to tab CSFACT denied  
Record: 1/1



- If you try to search for a client directly from Contact Notes screen and you do not meet the criteria, you may see the message displayed in the bottom left of the screen as in the example below.

Access to requested record denied by PP16  
Record: 1/1



- Where you try to navigate to Contact Notes for a client from any module in Swift and you do not meet the criteria you will be taken to a blank Contact Notes screen with no client information displayed.
- If you have a genuine need to access Contact Notes and/or Hazards screen for a client you will need to record yourself as an additional involvement on the Involvements screen.

## Recording Additional Involvements

To record yourself as an additional involvement for a client you should be in Frontdesk – Involvements screen for the client.

- Press F6.
  - Complete the following fields:
 


**Start Date**  
Enter today's date.

**Involvement**  
Click on the drop down arrow and search for yourself.

**Organisation**  
No input necessary. The team you work for will automatically display.


**Involvement Role**  
Select appropriate Involvement Role.

**Start Date**  
Enter today's date.

**Notes**  
Enter any other information you feel relevant to describe your involvement.
  - Click on .
  - Once you have recorded yourself as an additional involvement you will then be able to access Contact Notes and/or Hazards screen to complete any work required.

## Ending Additional Involvements

When you have completed any necessary work with the client you must end your involvement on the Involvements screen whereby you would revert to being unable to access these screens again.

- From Involvements screen click on the involvement that needs to be ended. Be careful to click on the correct one to ensure that you do not close of the wrong involvement.
- Enter the date your involvement with the client ended in the End Date field as highlighted in screen shot below.
- Click on .

*Note: the involvement role entered will be automatically ended.*



The screenshot shows a software interface with a menu bar at the top containing 'L'Pad', 'F'sheet', 'C'tacts', 'Refer', 'Involv', 'L'Refs', 'C'sent', 'Int. C'st', and 'Disclos'. The 'Involv' menu item is selected. Below the menu bar, there are several input fields and buttons. The 'Person/Organisation' field contains 'Dollin, Gwen (65217) / Alr'. The 'Start Date' field is set to '17-APR-2012'. The 'Involvement' field is set to 'Dollin, Gwen (65217)'. The 'Organisation' field is set to 'Alnwick Intake (Team)(11532)'. The 'End Date' field is set to '17-APR-2012' and is highlighted with a red box. An arrow points to the 'End Date' field. Below the 'End Date' field, there are buttons for 'Notes', 'Cost Centre', 'All', and 'Current'. At the bottom, there is a table with columns for 'Involvement Role', 'Start Date', 'End Date', and 'Notes'. The first row shows 'Duty Worker', '17-APR-2012', and 'duty call temp access'.

## **Where a Case Has Been Closed**

Where a case has been closed and all involvements have been ended then you will need to record yourself as an involvement on the Involvement screen in order to view Contact Notes and Hazards screen. You must end your involvement when you have completed relevant work on the client record.