The Insolvency Service

Guidance Notes for the use of the Director Conduct Reporting Service [DCRS]

Service Manager and Staff access to DCRS

1. Purpose of this guide

This guide is for insolvency practitioners who need to report under section 7A of the Company Directors Disqualification Act 1986 (CDDA) using the Director Conduct Reporting Service (DCRS) an online reporting tool for all insolvency appointments from 6 April 2016 where a director conduct report is required.

Specifically, this guidance relates to the functionality that enables IPs to manage the access of their staff to DCRS.

2. Introduction

From 11th May 2016, IPs are able to create two types of user to assist them in the operation of DCRS.

The two types of user are: -

- Service Manager and
- Staff

N.B. The role of Service Manager is probably of most use to IP firms with multiple appointment takers and may well not be needed in smaller firms.

Service managers

Service managers are “super users” within an IP firm. They are able to manage the access of all other staff within the firm. A Service Manager is able to view, access and update the cases of all those IPs who have added the Service Manager’s email address to their Settings screen [see para 6 below].

N.B. It will up to individual IP firms to decide what works best for them. However, if they wish one Service Manager to have access to all the firm’s cases then each IP within the firm will need to add that Service Manager’s email address to their Settings on DCRS [see para 6 below].

Service Managers are not able to submit conduct reports but are able to add and remove Staff from the system.

See paras 3--11 below for how to add/create Service Managers on DCRS.

Staff

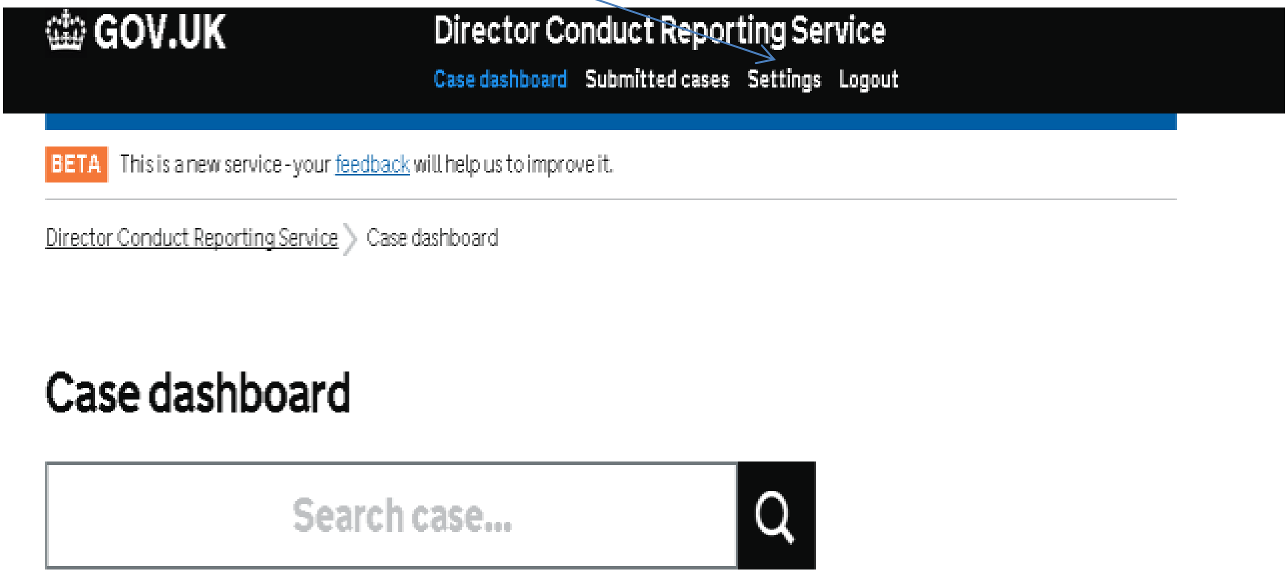
Staff are allocated to individual cases and are able to enter and save information onto DCRS.

Staff are not able to submit conduct reports and are unable to add or remove staff to cases or to DCRS.

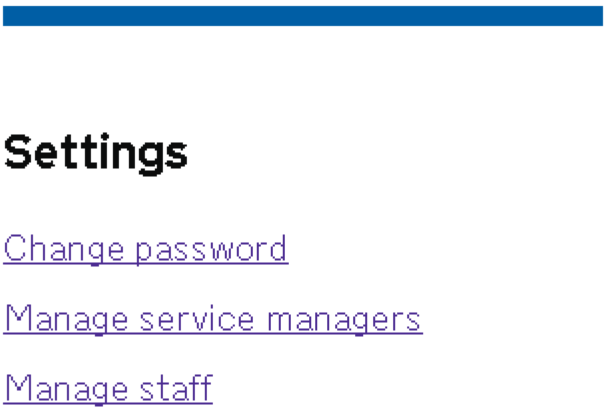
See para 12--16 below for how to add/create staff access onto DCRS.

3. How to create Service Managers on DCRS.

IPs should login to DCRS in the normal way and, from the Dashboard, click on Settings

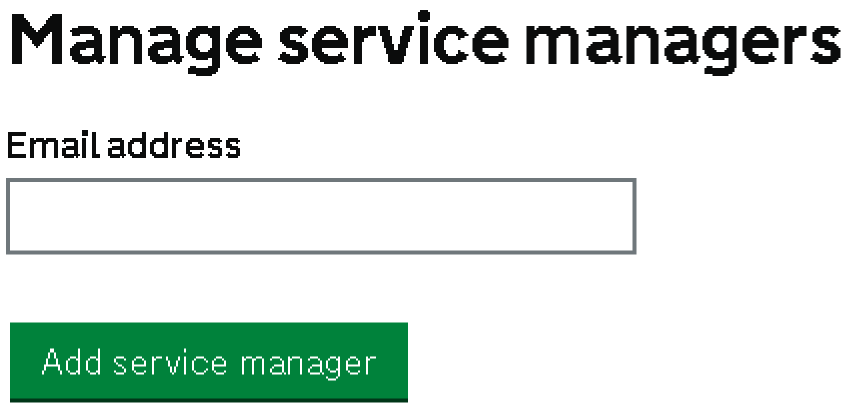


4. On the Right Hand Side IPs will then see 3 options: -



5. IPs should click on “Manage service managers.”

6. IPs will see: -



7. IPs should type into the box provided the email address of the person within their firm who they wish to give this access to.

N.B. IPs will not be able to use the same email address for both a Service Manager and Staff.

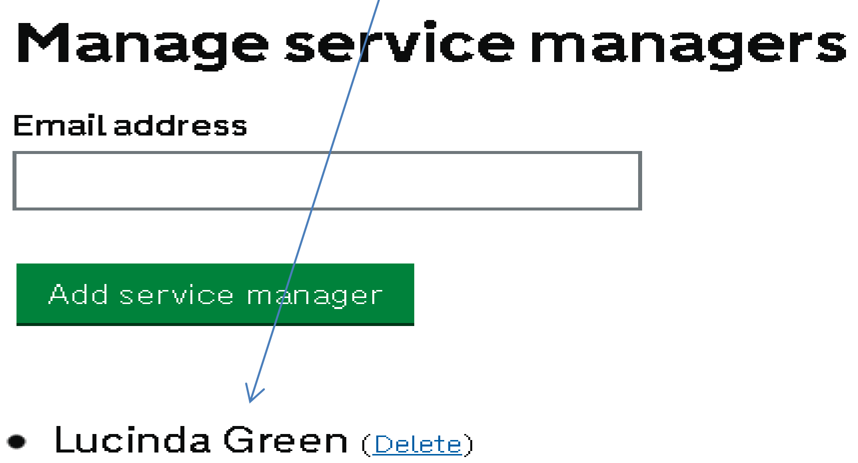
8. What happens after the person’s details have been added?

If the person is new to DCRS, a temporary password will be emailed to them and they will be required to register and login to DCRS.

If the person is already known to DCRS [for example, where another IP in the same firm has already added the Service Manager’s details to the system] then no temporary password is sent but the Service Manager’s Dashboard will now include both IPs’ cases.

9. What will IPs see?

In the example below, Lucinda Green has been added as a Service Manager.



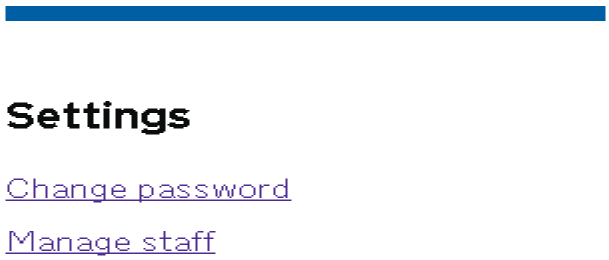
An IP will now be able to add further Service Managers if they wish or delete existing ones.

10. What will Service Managers see on their Dashboard?

A Service Manager will be able to view, access and update the cases of all those IPs who have added that Service Manager's details to their Settings tab.

11. What will Service Managers see on their Settings?

A Service Manager is not able to create additional Service Managers so will not have the "Manage Service Managers" option.

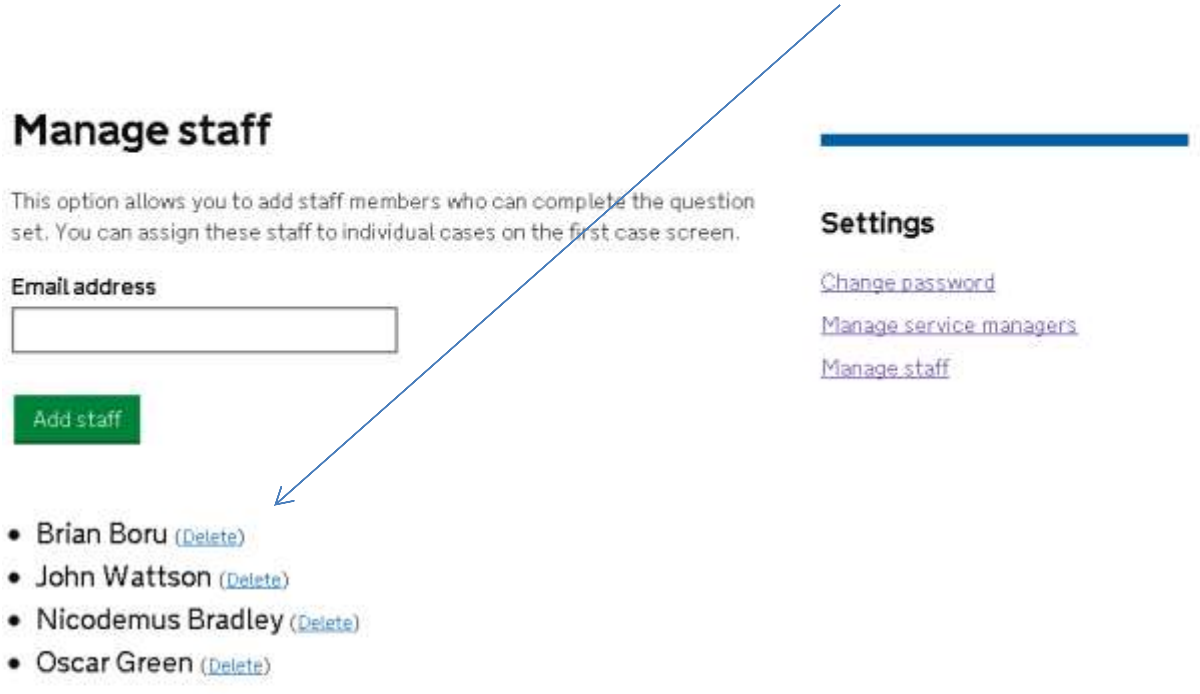


12. How to create Staff on DCRS.

IPs [or Service Managers] should login to DCRS in the normal way and, from their Dashboard of cases, click on Settings.

13. IPs [or Service Managers] should click on the "Manage staff" option on the Right Hand Side of the screen.

14. In the example below, 4 staff have already been added.



15. IPs should type into the box provided the email address of the person within their firm who they wish to add to DCRS.

16. What happens after the person's details have been added?

If the person is new to DCRS, a temporary password will be emailed to them and they will be required to register and login to DCRS.

If the person is already known to DCRS [for example, where another IP in the same firm has already added their details to the system] then no temporary password is sent.

17. What will Staff see on their Dashboard?

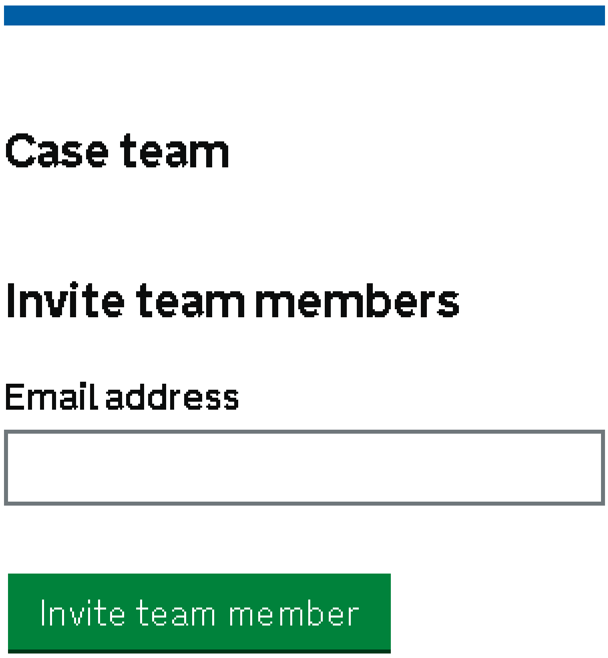
If they are not linked to any cases then they will not see any cases on their Dashboard.

18. How to link Staff to individual cases

IPs [or Service Managers] are able to allocate Staff to cases.

From their Dashboard, IPs [or Service Managers] should click on the case they wish to access.

On the Right Hand Side of the first screen they will see: -

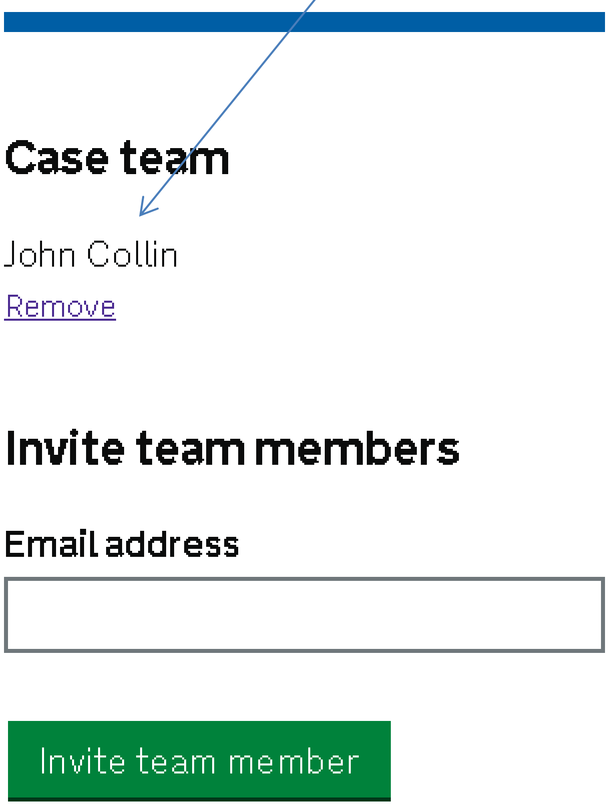


19. IPs / Service Managers should use the box provided to enter the email address of the person they wish to add to the case and click “Invite team member”.

If the email address is new to DCRS, a temporary password will be sent and the person will be required to register and login to DCRS.

If the person is already known to DCRS [for example, where their details have already been added in Settings] then no temporary password is sent.

In the scenario below, John Collin has been added to a case



20. IPs/Service Managers will now be able to add further Staff to the case if they wish or remove existing ones.