

## Process to restrict access to a client record in Eclipse (Lock/Unlock Record)

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Need identified to lock a person's record. Ensure you have referred to the [Restricting Access to Client Held Records](#) policy, before adding the request to the record in Eclipse.



After **Team Manager** agreement that the record can be restricted, the practitioner or Business Support should add and progress the '**Request to lock/unlock a record**' work list to the record that needs to be restricted.



Update & submit the '**Request to lock/unlock a record**' form.  
You will need to notify the **Area / Operations Manager** of your request.



**Area / Operations Manager** to review the request & authorise the form, ensuring the request is within the policy remit.



Following authorisation a new worklist will trigger—'**Lock Record—New request**' or '**Lock Record—Remove restriction**'. The worklist will be automatically assigned to the **Locked Records Team** who will **action the request**.

You will be able to see that the record has been locked as the 'locked' icon will show in the person bar.

**The Locked Records Team** will also automatically check to see if there is a linked CareFirst record and submit a SCOMIS Self Service request to restrict the record if appropriate.

Any queries relating to locked records on Eclipse should be directed to [business.eclipselockedrecords-mailbox@devon.gov.uk](mailto:business.eclipselockedrecords-mailbox@devon.gov.uk) . The Team can also assist with restrictions/access to children's services employee records on CareFirst.

The above process is followed for a review or removal of a restriction

**Process to restrict access to a client record -  
Frequently asked questions**

Question	Answer
How do I edit or end a restricted record?	Any changes to the Teams or individuals who have access to a locked record or if others should be restricted must be authorised by a Manager who can either update access themselves or email <a href="mailto:business.eclipselockedrecords-mailbox@devon.gov.uk">business.eclipselockedrecords-mailbox@devon.gov.uk</a> . A copy of the email authorising the edit must be attached to the original form requesting the lock, or the most recent review locked record form or added to a Case Note. To end a restriction, add the 'Request to lock/unlock a record' worklist and complete and submit the form. The Locked Records Team will action the removal of the restriction.
How can Adult workers get access to a child's locked record in Eclipse or CareFirst?	If, after a verbal update from the child's social worker it is still necessary to grant access to the record an email authorising access from the Childrens Area/Senior manager should be sent to <a href="mailto:business.eclipselockedrecords-mailbox@devon.gov.uk">business.eclipselockedrecords-mailbox@devon.gov.uk</a> to action.
Does a locked record need to be reviewed?	All locked records (except adoption records) must be reviewed every 6 months. A review date is added to the first request to lock the record which will trigger the review.