



Immigration  
Enforcement

# **Business Rules (IEBR)**

## **Identify & Prioritise Immigration Cases (IPIC)**

### **Training Guide – CSTT (Managers)**

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## Work Groups

# Work groups

This is the Work groups tab. This area of IPIC is used to create, edit, or delete groups. It is also used to add or remove users from groups.



The screenshot shows the top navigation bar with the title "Identify and prioritise immigration cases" and a "Log out" button. Below the navigation bar, the "Work groups" tab is selected and highlighted in blue. Other tabs include "Allocations", "Review", "Reports", and "Find someone".

## Work groups

[Help with work groups](#)

### Create a new work group

Create a new work group by giving it a name, assigning an action for the group and selecting caseworkers.

[Create a new group](#)

This is what the Work groups screen of IPIC looks like when no groups have been created yet.



The screenshot shows the top navigation bar with the title "Identify and prioritise immigration cases" and a "Log out" button. Below the navigation bar, the "Work groups" tab is selected and highlighted in blue. Other tabs include "Allocations", "Review", "Reports", and "Find someone".

## Work groups

[Help with work groups](#)

### Create a new work group

Create a new work group by giving it a name, assigning an action for the group and selecting caseworkers.

[Create a new group](#)

### Existing work groups

View and edit your work groups.

Name of group	Action	Number of caseworkers
[REDACTED]		3 <a href="#">Edit group</a>
[REDACTED]		2 <a href="#">Edit group</a>
[REDACTED]		1 <a href="#">Edit group</a>

This is what the Work groups screen of IPIC looks like when groups have been created.

# Creating a Workgroup (1 of 3)

1

## Work groups

▶ [Help with work groups](#)

### Create a new work group

Create a new work group by giving it a name, assigning an action for the group and selecting caseworkers.

**Create a new group**

2

- 1 Select on the 'Work groups' tab
- 2 Select the 'Create a new group' button

# Creating a Workgroup (2 of 3)

## Identify and prioritise immigration cases Log out

[Work groups](#) | [Allocations](#) | [Review](#) | [Reports](#) | [Find someone](#)

[< Back to all work groups](#)

### Create a new work group

Enter group name 3

What action will this group take? 4

Search and add caseworkers 5

Add caseworker 6

Caseworkers in this group

No caseworkers added yet

Create a new group

**\*\*Steps 5 & 6 should be repeated for all users you wish to add to a group**

- 3 Type the name of a group in the free text box. The name should reflect the type of cases that will be allocated to the group. You can't have two or more groups with the same name.

The group name should follow this naming convention:

**[Group name] – [Intervention]**

In practice, this means all groups should be named as outlined below:

- 4 Select the intervention action that the group will handle. Users will only see the intervention action types that they have permissions for.
- 5 Enter the POISE ID of the user to add to the group and select their name from the drop down when it appears.\*\*

Caseworkers will need to be added to IPIC before they appear in the drop down. **For 1<sup>st</sup> time rollout, users will be added by IPIC team.**

- 6 Select the 'Add caseworker' button to add the user to the group

# Creating a Workgroup (3 of 3)

**Identify and prioritise immigration cases** Log out

Work groups Allocations Review Reports Find someone

< Back to all work groups

### Create a new work group

Enter group name

What action will this group take?

Search and add caseworkers

Add caseworker

Caseworkers in this group

Create a new group 8

Remove Remove Remove 7

- 7 If you want to remove a caseworker from the group, select the 'Remove' icon for that caseworker. If you remove a caseworker the 'Remove' icon will change to 'Undo', which if you select will reverse the remove action and re-instate the caseworker to the group
- 8 Once you're happy with the caseworkers allocated to the group, select the 'Create group' button. Note, you can add and remove caseworkers from a group any time
- 9 IPIC will confirm the group has been successfully created.
- 10 You will have the option to 'allocate cases to this group' or 'create a new group'.

**Identify and prioritise immigration cases** Log out

Work groups Allocations Review Reports Find someone

< Back to Work groups

Created

has been created

Next steps

10 You can [allocate cases to this group](#) or [create another group](#)

# Editing a Work group (1 of 2)

Work groups

Allocations

Review

Reports

Find someone

1

## Work groups

[Help with work groups](#)

### Create a new work group

Create a new work group by giving it a name, assigning an action for the group and selecting caseworkers.

Create a new group

### Existing work groups

View and edit your work groups.

Name of group

Action

Number of caseworkers

3

[Edit group](#)

2

[Edit group](#)

1

[Edit group](#)

1 Select the 'Work groups' tab.

2 Locate the group that needs to be edited, then select the 'Edit group' button.

2

# Editing a Workgroup (2 of 2)

**Identify and prioritise immigration cases** Log out

[Work groups](#) [Allocations](#) [Review](#) [Reports](#) [Find someone](#)

[< Back to all work groups](#)

View and edit the group name and caseworkers.

**View and edit group name** 3

**Action**

**Search, add or remove caseworkers**

Add caseworker 5

4

6

[Undo](#)  
[Remove](#)  
[Remove](#)

7

[Save and continue](#) [Delete this group](#)

- 3 To edit the group name, click into the 'Group name' box and enter the new / amended group name.
- 4 To add a Caseworker to a group, type the name of a Caseworker you want to add to the group in the search bar and select their name from the options
- 5 Select the 'Add caseworker' button
- 6 To remove a Caseworker from a group, select the 'Remove' link for that Caseworker. If you remove a Caseworker the 'Remove' link will change to 'Undo', which if you select will reverse the remove action and re-instate the Caseworker to the group
- 7 Select the 'Save and continue' button once the required changes have been made.

# Deleting a Workgroup

Identify and prioritise immigration cases [Log out](#)

[Work groups](#) [Allocations](#) [Review](#) [Reports](#) [Find someone](#)

[Back to all work groups](#)

View and edit the group name and caseworkers.

View and edit group name

Action

Search, add or remove caseworkers

[Add caseworker](#)

Caseworkers in this group

[Remove](#)

[Save and continue](#) [Delete this group](#)

1 If deletion of the group is required select the 'Delete this group' icon.

2 You will see a prompt screen asking 'Are you sure?' Select 'Yes, delete group' to continue.

3 A confirmation screen will be displayed to confirm the group has been deleted and all allocated cases to this workgroup will be made available for allocation.

Identify and prioritise immigration cases [Log out](#)

[Work groups](#) [Allocations](#) [Review](#) [Reports](#) [Find someone](#)

## Are you sure?

Caseworkers assigned to the group will be removed and cases will be removed and made available for allocation.

[Yes, delete group](#) [Cancel](#)

Identify and prioritise immigration cases [Log out](#)

[Work groups](#) [Allocations](#) [Review](#) [Reports](#) [Find someone](#)

[Back to Work groups](#)

Deleted

as been deleted  
Any cases allocated to this group will be removed and made available for allocation.

[Create a new group](#)

## Applying Filters and Case Allocation

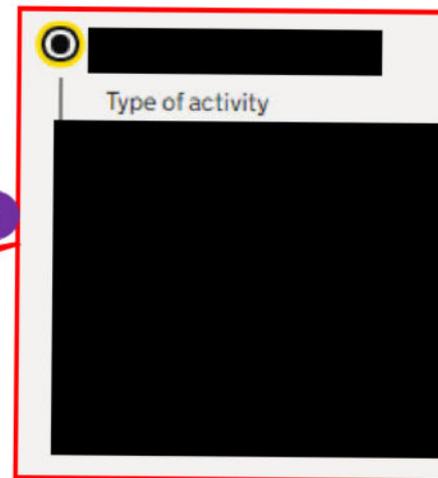
# Applying Filters – Case Type

IPIC recommends cases that are suitable for a particular action (case type). It also gives users the option of applying filters to further refine the recommended cases.



## Case Allocations

Filter recommended cases by IPIC and allocate them to your created work groups. If you 'Allocate all', any new cases matching the filters will be added to the group from then on.



- 1 First step is to select the 'Allocations' tab in the header menu.
- 2 User selects which intervention action to search for cases for. For absconders at present, there is only one action type ( [redacted] ) available.

When it is selected, additional options will automatically be displayed.

# Applying Filters – Case Type

IPIC recommends cases that are suitable for a particular action (case type). It also gives users the option of applying filters to further refine the recommended cases.

**Identify and prioritise immigration cases** Log out

Work groups **Allocations** Review Reports Find someone

## Filters

## Case Allocations

Filter recommended cases by IPIC and allocate them to your created work groups. If you 'Allocate all', any new cases matching the filters will be added to the group from then on.

**Case type**

Action

3 [Redacted]

4 [Redacted]

5 **Apply filter**



- 3 Choose the type of activity you wish to search for by selecting the applicable option(s)
- 4 Choose the [Redacted] wish to search for by selecting the applicable option(s)
- 5 Select 'Apply filter' to execute the search

**Definitions**  
For Definitions of [Redacted] cases [chapter 7 – FAQs](#)

# Allocations – Continuous Allocation to a Group



The recommended cases will be presented in a list view.

Select the 'Change search' link to return to the filters screen to edit any case filter criteria

6 Use the drop down menu to select the group to which the cases will be continually applied.

7 Select 'Allocate all' to allocate the cases to the group selected in Step 1.



**Allocate All** will allocate all of the currently recommended cases to the selected group *and* IPIC will continuously monitor data to add or remove cases that meet or stop meeting the criteria that you have set. This will continue until a Manager stops the allocation through the Review tab.

The screenshot shows the 'Identify and prioritise immigration cases' interface. At the top, there is a navigation bar with 'Work groups', 'Allocations', 'Review', 'Reports', and 'Find someone'. Below this is the 'Case allocation' section, which includes a 'Change search' link and a dropdown menu for selecting a group to allocate cases to. The dropdown menu is highlighted with a red box and a green 'Allocate all (41)' button. Below the dropdown, it says '41 recommended cases'. A table with columns 'Person ID', 'Name', 'Action', and 'Type of activity' is shown, with a list of checkboxes on the left side of the table.

# Allocations – Allocating specific number of cases to a Group

 Identify and prioritise immigration cases Log out

Work groups **Allocations** Review Reports Find someone

## Case allocation

Filter recommended cases by IPIC and allocate them to your created work groups. If you 'Allocate all', any new cases matching the filters will be added to the group from then on.

[Change search](#)

6 Select a group to allocate cases to

Allocate all (41)

Allocate selected (8)

[Clear selections](#)

8

41 recommended cases

7

	Name	Action	Type of activity
<input checked="" type="checkbox"/>			
<input type="checkbox"/>			
<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>			
<input type="checkbox"/>			
<input checked="" type="checkbox"/>			
<input type="checkbox"/>			
<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>			
<input type="checkbox"/>			

6 Use the drop down menu to select the group to which the case(s) will be allocated.

7 Select the case(s) to assign to the group by ticking the check box next to each respective case.

8 Once at least one case has been ticked, an 'Allocate selected' button will appear. Select this to assign the selected case(s) to the selected group.



IPIC will now assign the selected case(s) to the selected group.

Note, if a selected case no longer becomes suitable for the given action due to a change in the underlying data, it will drop out of the Recommended list for the given group.

You can only Allocate All or Allocated selected to a group. You can't do both.

The Manager will need to frequently monitor the group using the Review tab to ensure the users in the group have a sufficient number of cases to review.

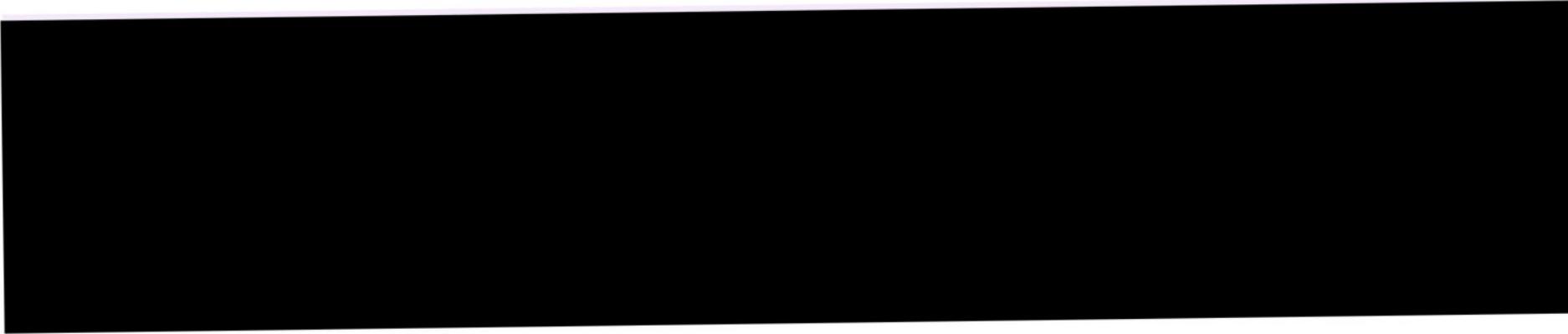
# Allocating Cases and Groups (1 of 2)

The way that filters and allocating cases to groups works in IPIC is similar to the way a spreadsheet in Microsoft Excel is filtered.

The examples below explain how applying the filters will affect the results returned:

**Example 1 – Apply two different filters:** I have filtered cases by selecting [REDACTED] I apply another filter by selecting [REDACTED]. This second filter will only be applied to cases that also meet the first filter.

**Result:** Cases that meet both filters will be returned.



# Allocating Cases and Groups (2 of 2)



## Review Tab and Managing Allocations

# Review Tab – Reviewing Cases (1 of 1)

This is the Review tab. This area of IPIC is used to view the number and detail of Recommended, Accepted, Rejected, and On Hold cases across the Work groups a Manager has access to. A Manager will see all groups related to the intervention action types that they have access to.

Review tab is also used to view or edit the filters that assign cases to each Work group.

The screenshot shows the 'Identify and prioritise immigration cases' interface. At the top, there is a navigation bar with 'Work groups', 'Allocations', 'Review' (selected), 'Reports', and 'Find someone'. Below this is a 'Review' section with a 'Work group' dropdown menu (callout 1) and a row of tabs: 'Recommended (87)', 'Accepted (15)', 'Rejected (10)', and 'On hold (3)' (callout 2). Under the 'Recommended cases' section, there is a 'View or edit filter' link and a table with a 'Person ID' column. A large black redaction box covers the table content, with a small red box highlighting the right edge of the redaction (callout 3).

- 1 Select the Work group that needs to be reviewed or have its filter edited.
- 2 To review the cases that are currently Recommended, Accepted, Rejected, or On Hold for the group, select the associated tab.
- 3 To review an individual case within the Recommended, Accepted, Rejected, or On Hold tab, select the Name of the individual.

# Review Tab – Editing filters (1 of 2)

Identify and prioritise immigration cases Log out

Work groups Allocations **Review** Reports Find someone

## Review

Work group

Recommended (37) Accepted (15) Rejected (10) On hold (3)

### Recommended cases

[View or edit filter](#)

1 Select the Work group to review or edit the filters on.

2 To see what filters have been applied to the group, or make changes to the filter, select 'View or edit filter'.

3 Make the required changes to the filter.

Identify and prioritise immigration cases Log out

Work groups Allocations **Review** Reports Find someone

## Review

Work group

Recommended (37) Accepted (15) Rejected (10) On hold (3)

### Recommended cases

▼ View or edit filter

Case type

Apply filter [Cancel changes](#) [Remove filter from work group](#)

# Review Tab – Editing filters (2 of 2)

## Case type

Action

**a** **b** **c**

Apply filter Cancel changes Remove filter from work group

Person ID

Either:

- a** If changes have been made to the filter, select 'Apply filter' to save these changes.
- b** Select 'Cancel changes' to restore the filter to its previous configuration.
- c** Select 'Remove filter from work group' to delete the filter from the work group.

## Identify and prioritise immigration cases

Log out

Work groups Allocations **Review** Reports Find someone

< Back

### Are you sure?

34 cases will be removed from [redacted] and made available for allocation.

**4** Cases already accepted, rejected or on hold will remain.

Apply filter Cancel

▶ Cases being removed

- 4** If changes are being applied to a filter, or if a filter is being removed IPIC will request confirmation that the filter should be applied or removed.

Select 'Apply filter' to update the allocation,  
or  
Select 'Cancel' to stop any of the draft changes.

The text of the confirmation will explain the impact of the change that the user is about to make.



To view the exact list of cases that will be removed if the action is completed, select 'Cases being removed' and it will expand, showing a list of the cases that will be removed.



## Frequently Asked Questions

# Frequently Asked Questions (1 of 2)

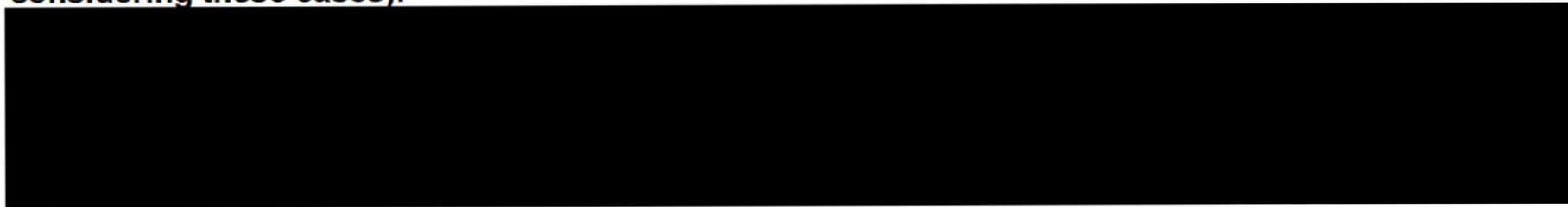
## 1. What is a manager in IPIC?

The manager role in IPIC only relates to the level of access that a given user has. It means that the user is able to set up, review, and edit groups that case workers are assigned to. A manager can also review cases recommended for a given intervention action and accept, reject, or place them on hold. The name of this role in IPIC does not relate to a given user's actual job title or grade.

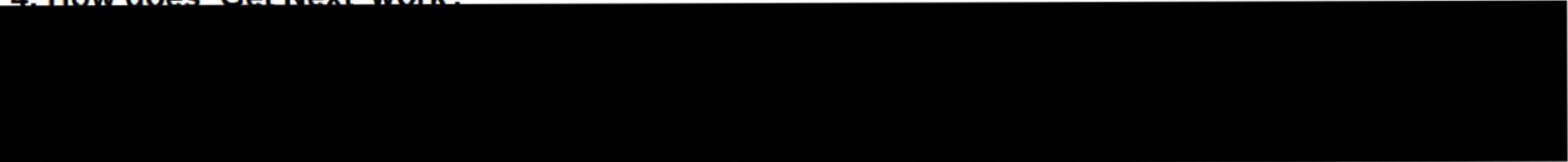
## 2. What is a case worker in IPIC?

The case worker role in IPIC only relates to the level of access that a given user has. It means that the user is able to review cases recommended for a given intervention action and accept, reject, or place them on hold. The name of this role in IPIC does not relate to a given users actual job title or grade.

## 3. As a manager, how do I exclude certain cases from my search (e.g. I don't want any of my team considering these cases).



## 4. How does 'Get Next' work?



# Frequently Asked Questions (2 of 2)

## **5. What happens if two people work on the same case in IPIC?**

This is very unlikely, because the list of recommended cases continually updates. If two users clicked on a case at the exact same time, they would both review the same case. Both reviewers would be able to make a decision on the case to Accept / Reject / Place on Hold. However, the most recent decision would be saved and shown in the MI report, but is unlikely to occur in practice.

## **6. I'm a Manager – How can I give my team access to look at two or more case types**

You will need to select the appropriate filters for the relevant group and allocate the cases to that group accordingly..