Immigration
Enforcement

Business Rules (IEBR)

Identify & Prioritise Immigration Cases (IPIC)

Training Guide – CSTT (Managers)

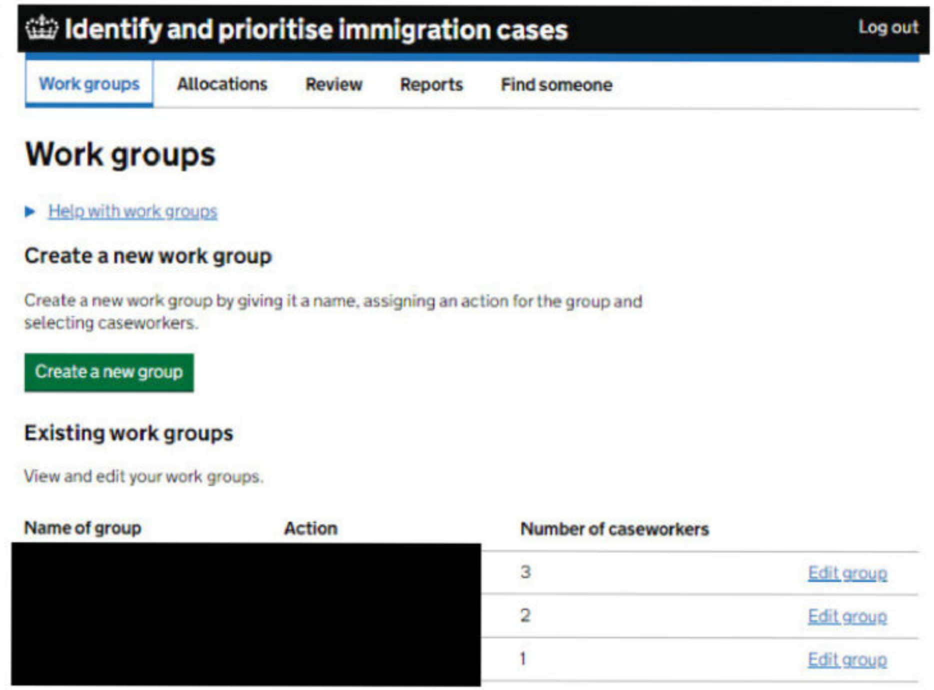
Contents

Work Groups

Work groups

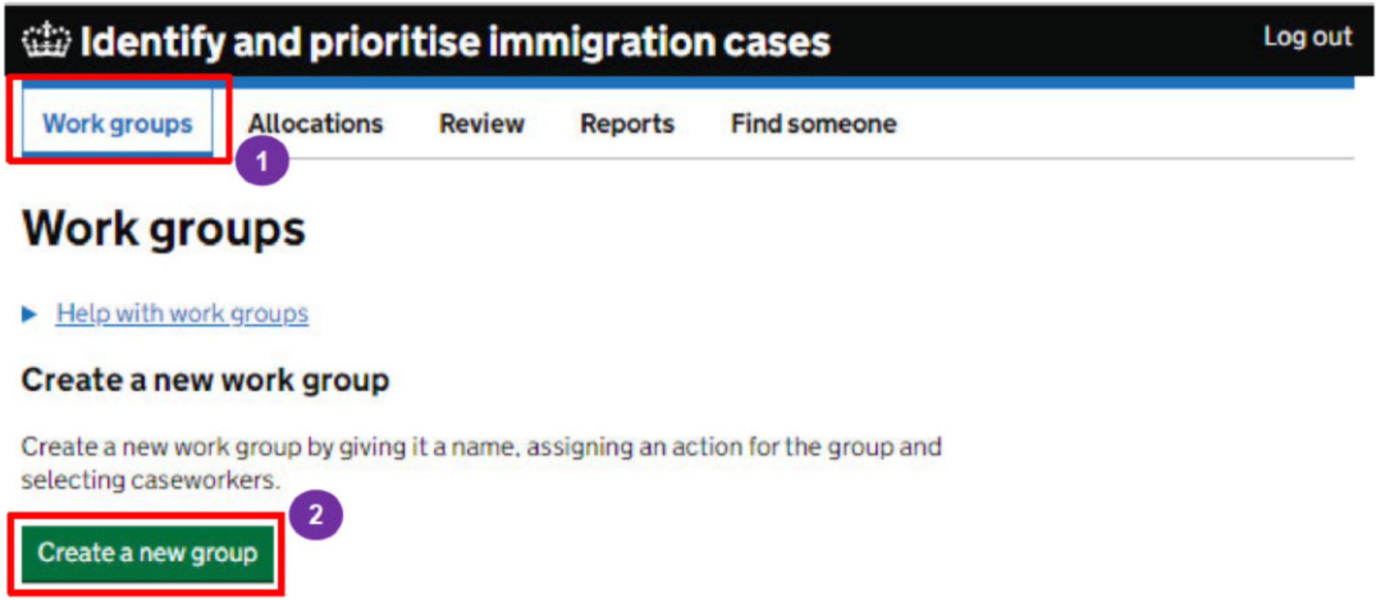
This is the Work groups tab. This area of IPIC is used to create, edit, or delete groups. It is also used to add or remove users from groups.

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



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

Creating a Workgroup (1 of 3)



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

[redacted]

What action will this group take?

[redacted] 4

Search and add caseworkers 5

[redacted] 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:

[redacted]

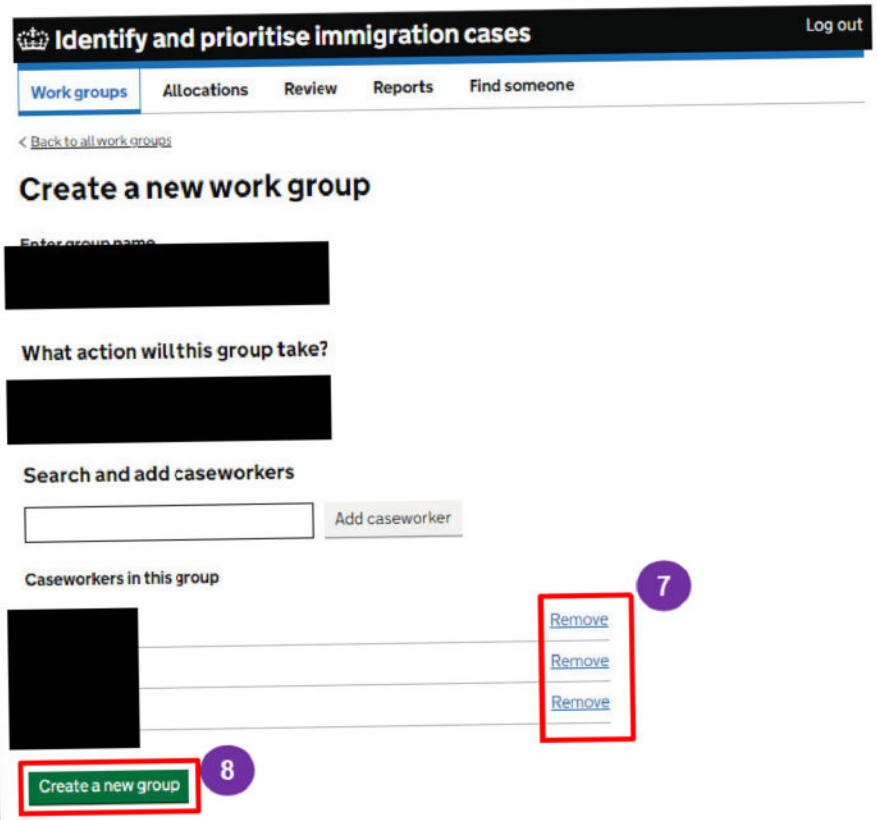
4 Select the intervention action that the group will handle. Users will only see the intervention action types that they have permissions for.

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 1st 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)

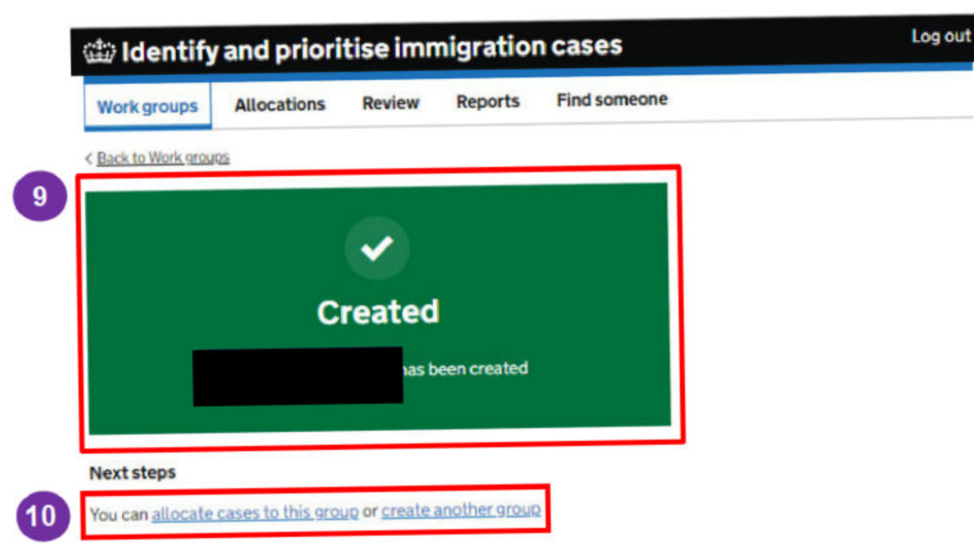


7. If you want to remove a caseworker from the group, select the 'Remove' icon for that caseworker. If you remove a caseworker the 'Remove' icon will change to 'Undo', which if you select will reverse the remove action and re-instate the caseworker to the group

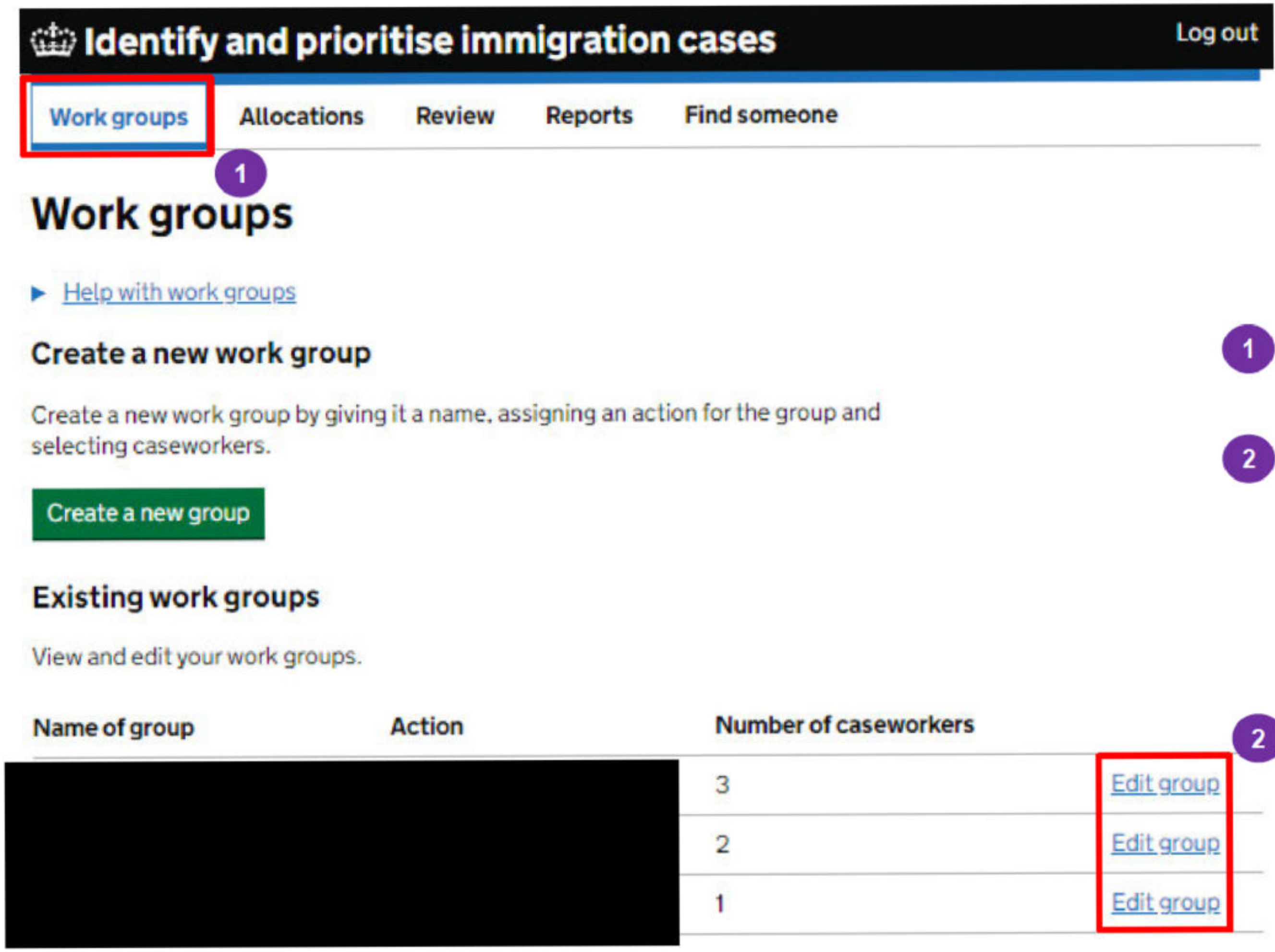
8. Once you're happy with the caseworkers allocated to the group, select the 'Create group' button. Note, you can add and remove caseworkers from a group any time

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'.

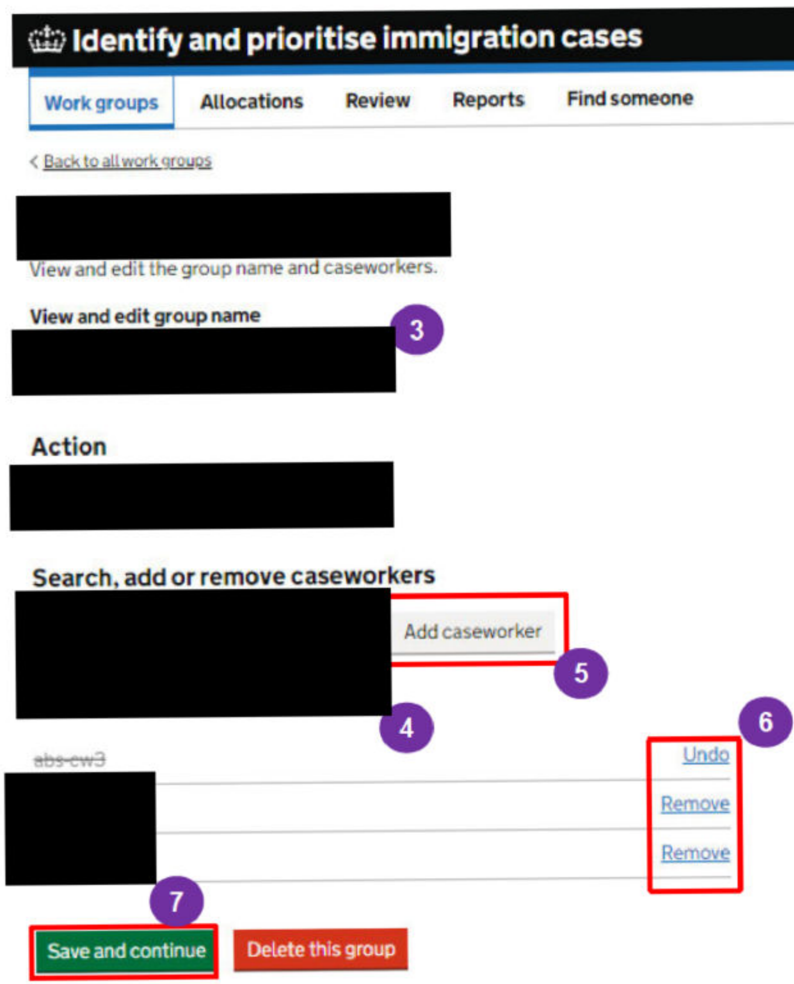


Editing a Work group (1 of 2)



1. Select the 'Work groups' tab.
2. Locate the group that needs to be edited, then select the 'Edit group' button.

Editing a Workgroup (2 of 2)



3. To edit the group name, click into the 'Group name' box and enter the new / amended group name.

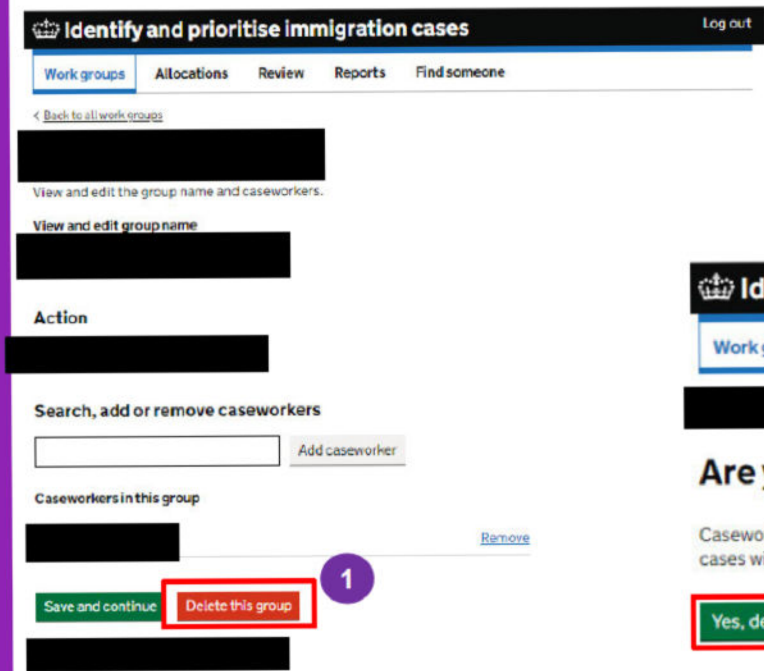
4. To add a Caseworker to a group, type the name of a Caseworker you want to add to the group in the search bar and select their name from the options

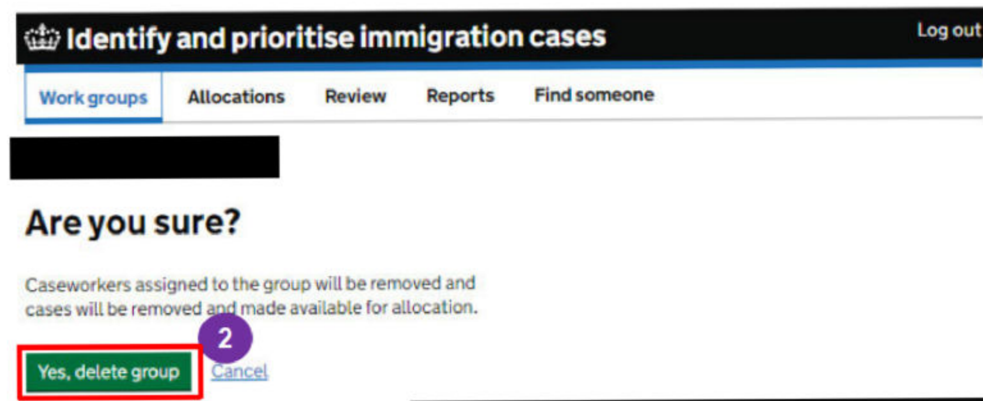
5. Select the 'Add caseworker' button

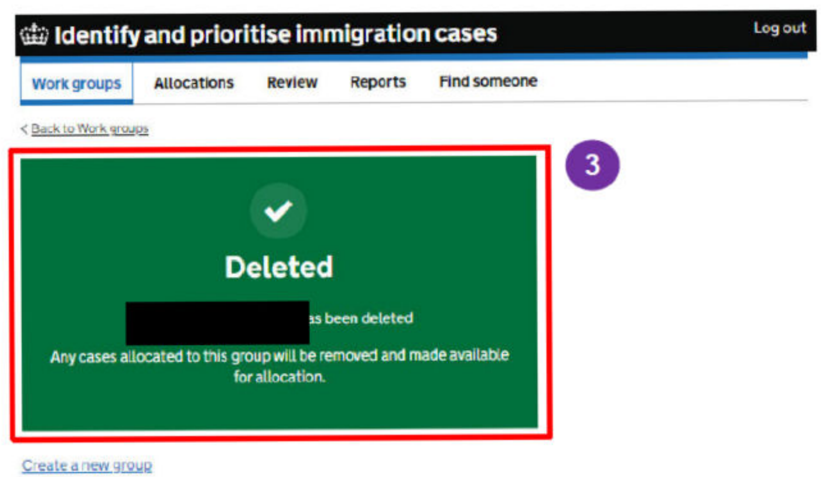
6. To remove a Casework from a group, select the 'Remove' link for that Caseworker. If you remove a Caseworker the 'Remove' link will change to 'Undo', which if you select will reverse the remove action and re-instate the Caseworker to the group

7. Select the 'Save and continue' button once the required changes have been made.

Deleting a Workgroup







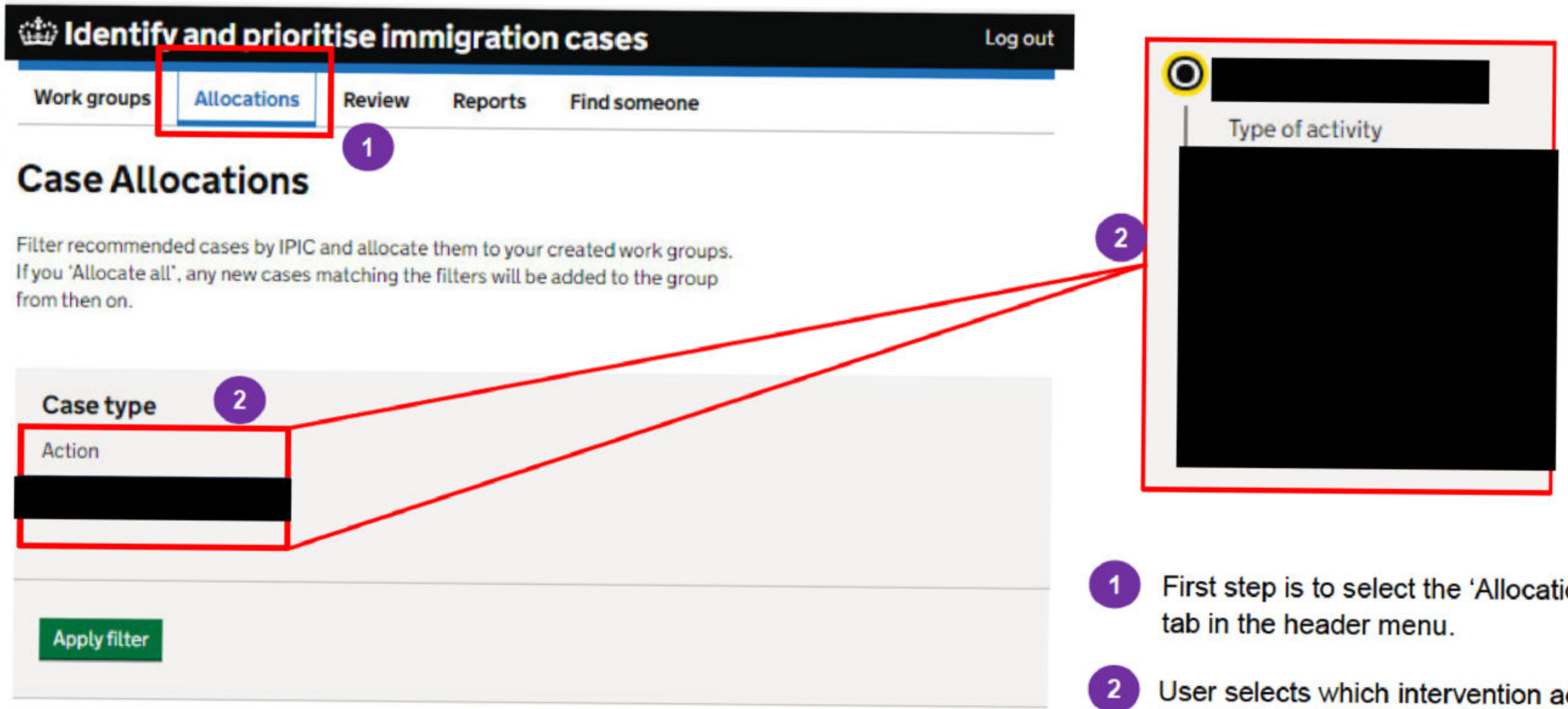
1. If deletion of the group is required select the 'Delete this group' icon.
2. You will see a prompt screen asking 'Are you sure?' Select 'Yes, delete group' to continue.
3. A confirmation screen will be displayed to confirm the group has been deleted and all allocated cases to this workgroup will be made available for allocation.

Chapter 3

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.



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

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.

Filters

[redacted]

1,2, or all 3

1 or both

Case type

Action

3

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)

Definitions
For Definitions o[redacted]ases chapter 7 – FAQs

5 Select 'Apply filter' to execute the search

Allocations – Continuous Allocation to a Group

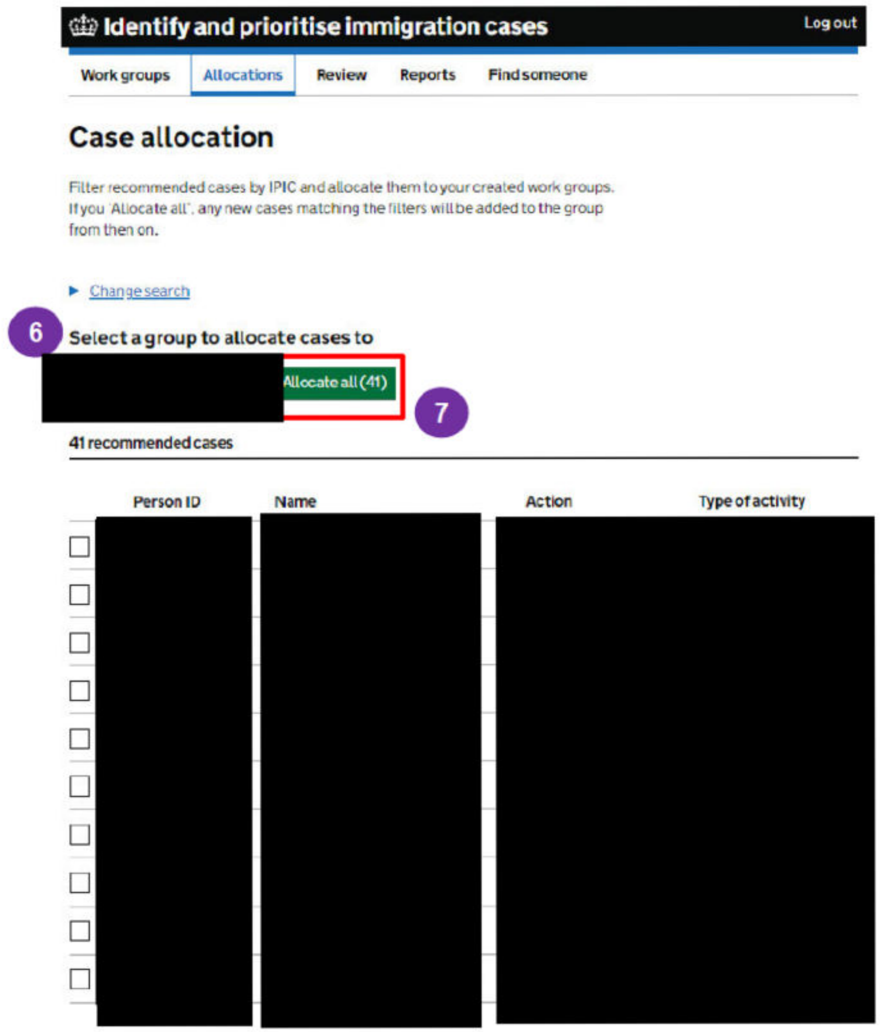
The **recommended cases** will be presented in a list view. [redacted]

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.



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

[redacted] Allocate all (41) | Allocate selected (8) | Clear selections 8

41 recommended cases

7

	[redacted]	Name	Action	Type of activity
☑	[redacted]			
☐				
☑				
☑				
☐				
☐				
☑				
☑				
☐				
☑				
☐				
☑				
☑				
☐				

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.

[redacted]

Allocating Cases and Groups (2 of 2)

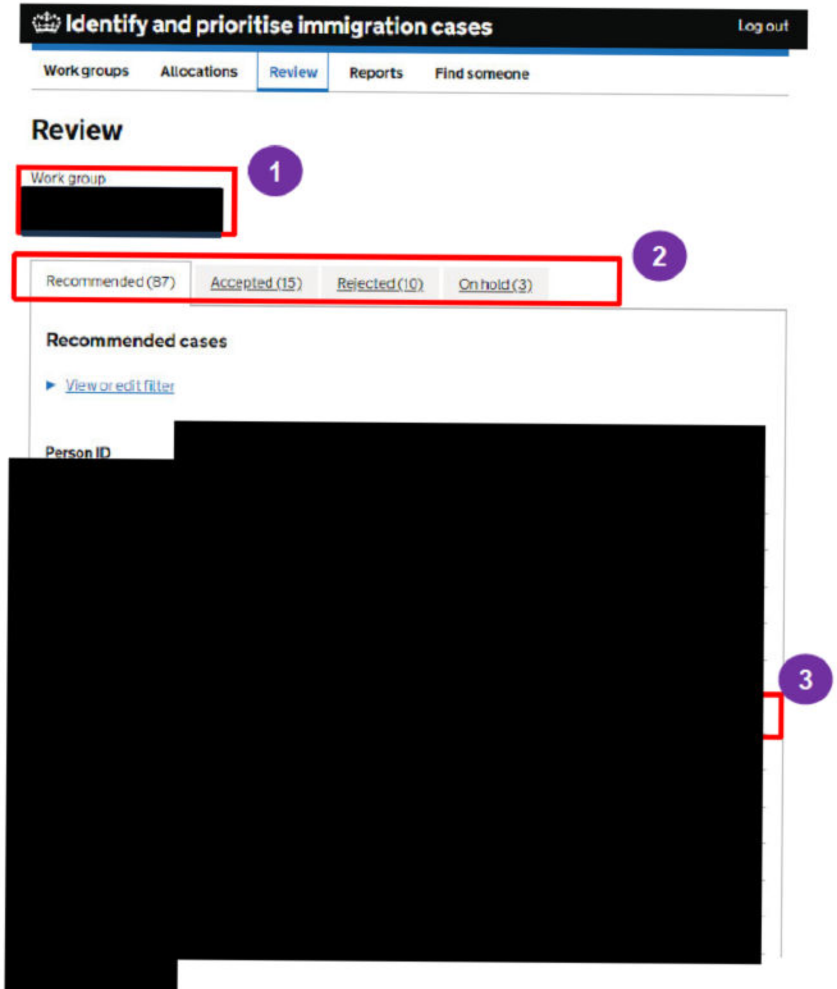
[redacted]

Review Tab and Managing Allocations

Review Tab – Reviewing Cases (1 of 1)

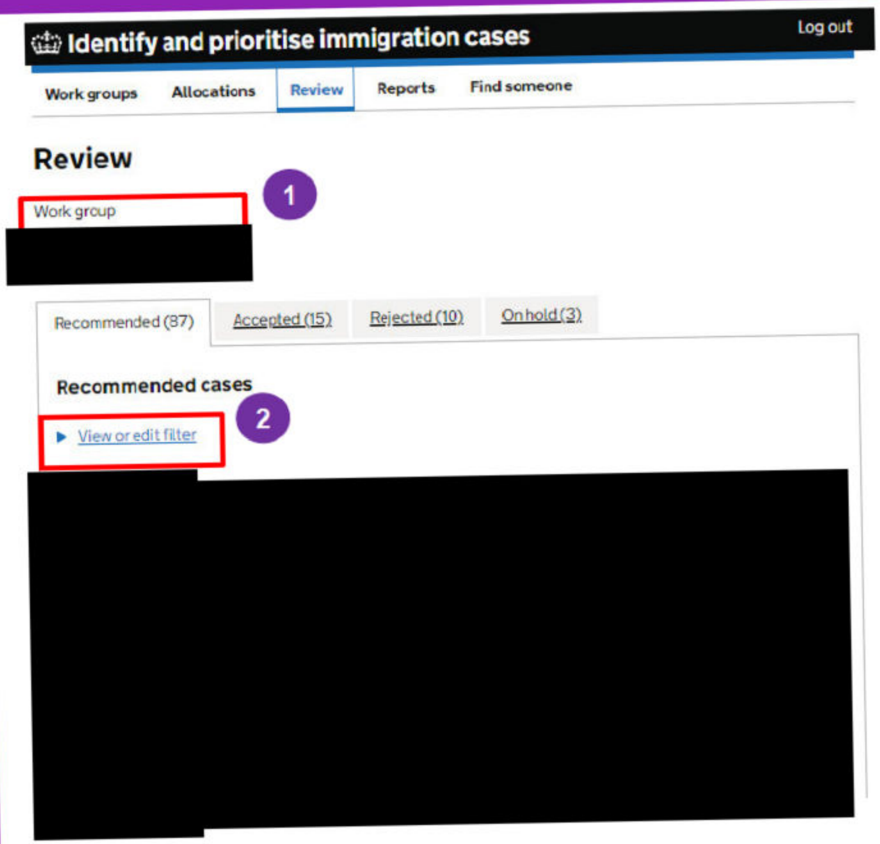
This is the Review tab. This area of IPIC is used to view the number and detail of Recommended, Accepted, Rejected, and On Hold cases across the Work groups a Manager has access to. A Manager will see all groups related to the intervention action types that they have access to.

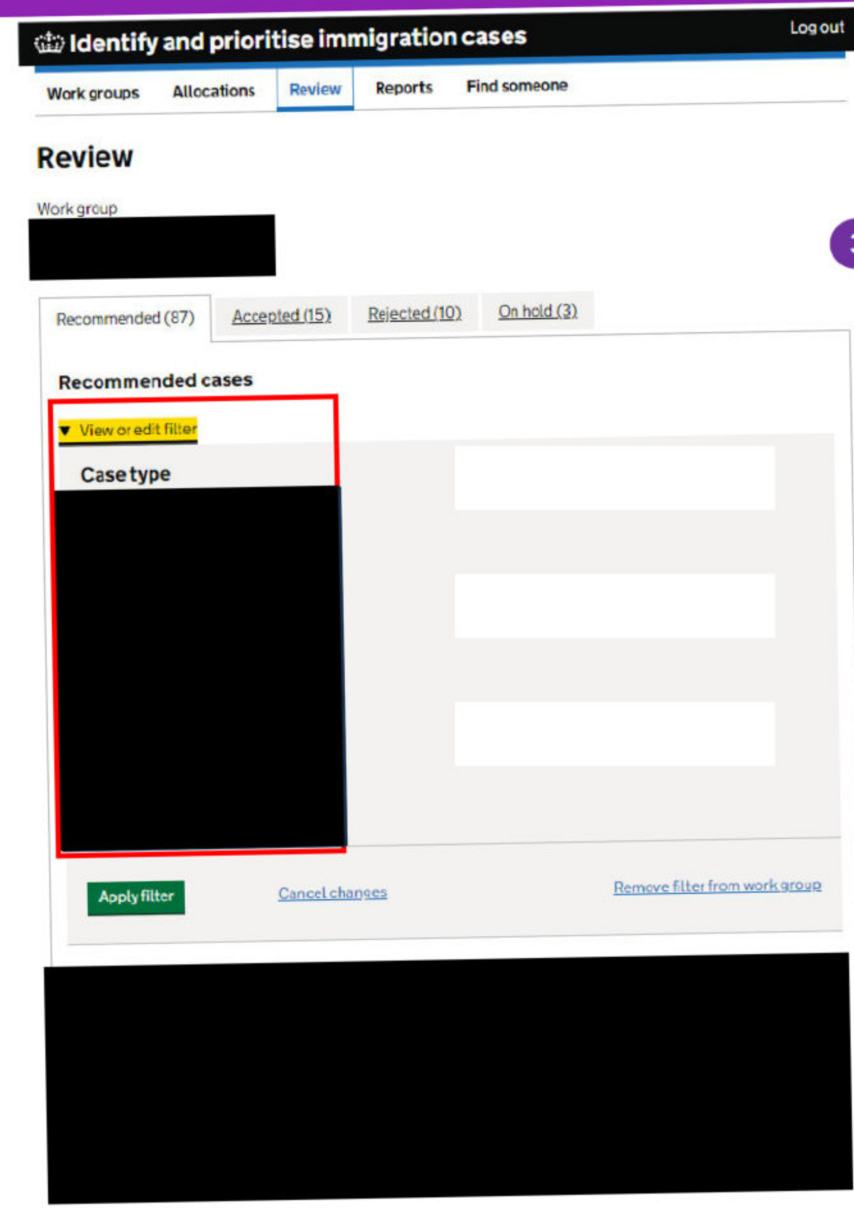
Review tab is also used to view or edit the filters that assign cases to each Work group.



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.

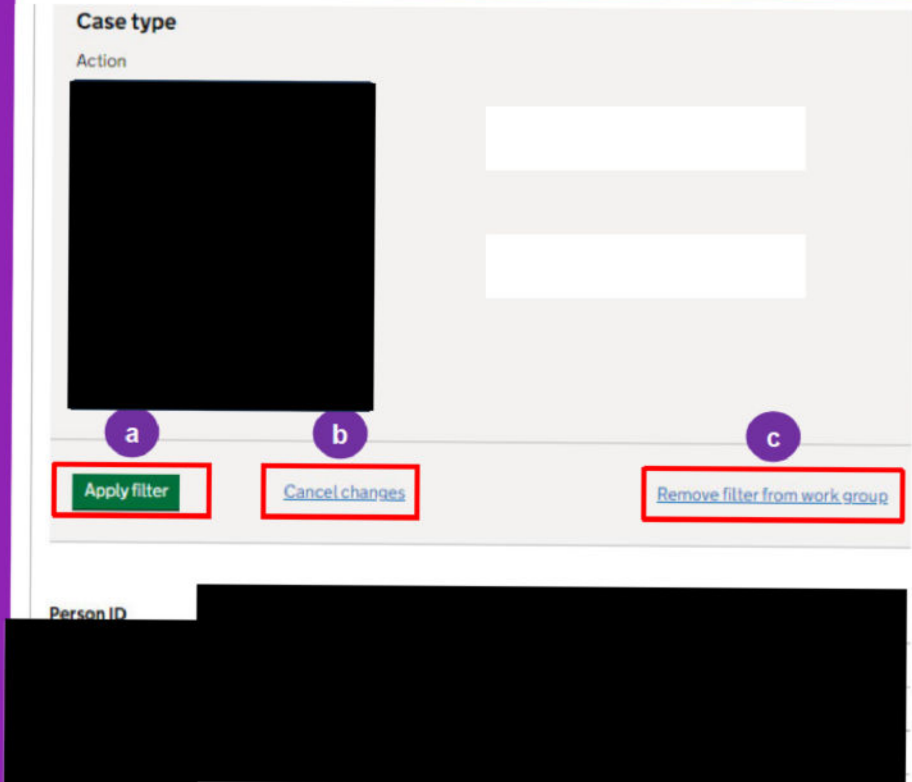
Review Tab – Editing filters (1 of 2)





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.

Review Tab – Editing filters (2 of 2)



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.

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.

Annex A

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).

[redacted]

4. How does 'Get Next' work?

[redacted]

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..

[redacted]