



Immigration
Enforcement

Business Rules (IEBR)

**Identify & Prioritise Immigration Cases (IPIC)
Returns Preparation 2 Service**

**Reference Manual – Manager Access
January 2023**

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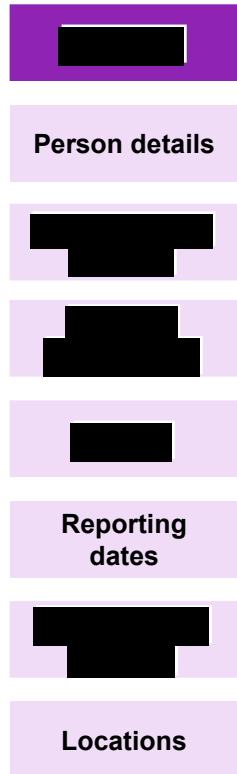
8. [IPIC Team Contact Information](#)

New Functionality

Applying Filters – Actions & Case Type

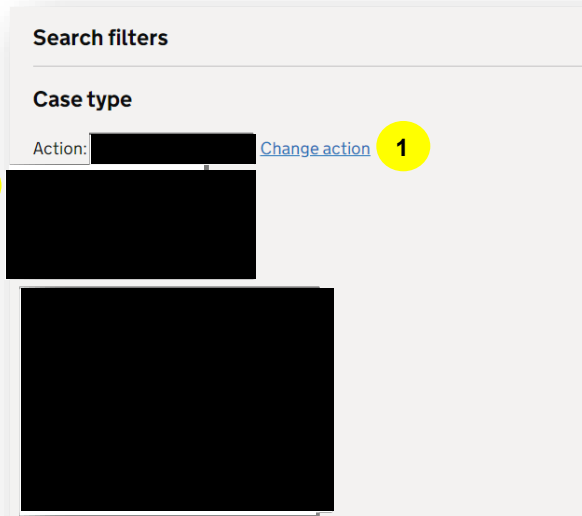
Filter recommendations and allocate them to work groups.

Available Filters



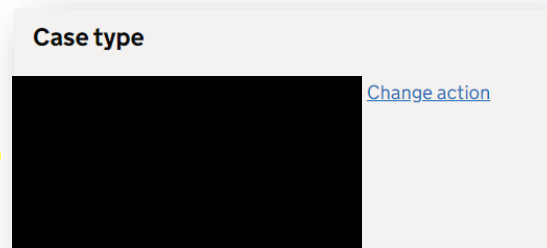
A sidebar titled 'Available Filters' containing several filter categories, each with a redacted label:

- [Redacted]
- Person details
- [Redacted]
- [Redacted]
- [Redacted]
- Reporting dates
- [Redacted]
- Locations



A 'Search filters' dialog box with the following elements:

- Case type**
- Action: [Redacted] [Change action](#) (1)
- [Redacted] (2)
- [Redacted] (3)



A 'Case type' dialog box with the following elements:

- [Redacted] (4)
- [Change action](#)

1 You can change the case type by selecting the 'Change action' link. IPIC now has the option to look at [Redacted] recommendations.



Four blocks of redacted content, each preceded by a yellow circle containing a number:

- 2 [Redacted]
- 3 [Redacted]
- [Redacted]
- 4 [Redacted]

Applying Filters – Prioritisation

Set a priority for recommendations to be presented to IPIC Caseworkers via the 'Get Next' function.

Available Filters

1



Person details



Reporting
dates



Locations



1

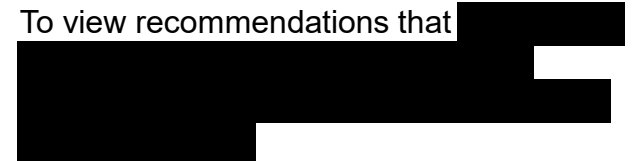
Select the appropriate prioritisation type from the list.



This filter will set the order of recommendations being presented to caseworkers via the 'Get Next' function from



To view recommendations that



To note: You can only set one prioritisation type per allocation to a work group.

Available Filters

[Redacted]

Person details

[Redacted]

[Redacted]

[Redacted]

Reporting dates

[Redacted]

Locations

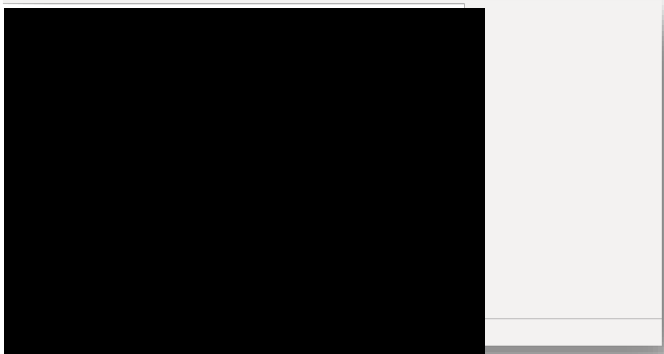
1a

1b

2



3



1a



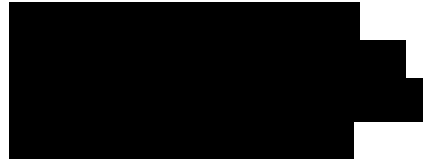
2



1b



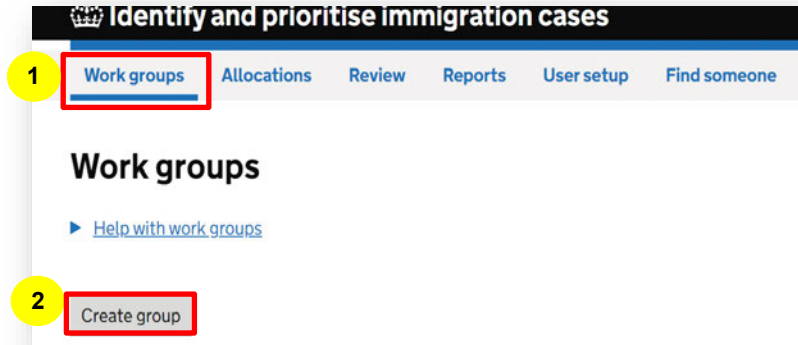
3



Work Groups Tab

Creating and Editing Work Groups

Work Groups - Creating a Workgroup (1 of 2)

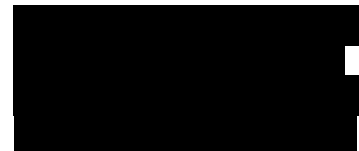


- 1 Click on the 'Work groups' tab
- 2 Select 'Create group'
- 3 Type the name of the group in the free text box. The name should reflect the type of recommendations that will be allocated to the group. You can't have two or more groups with the same name.

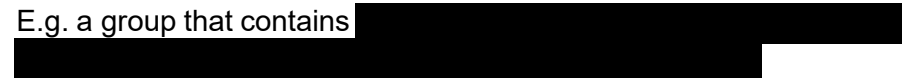
The group name should follow this naming convention:

[Intervention] – [Description of Filter]

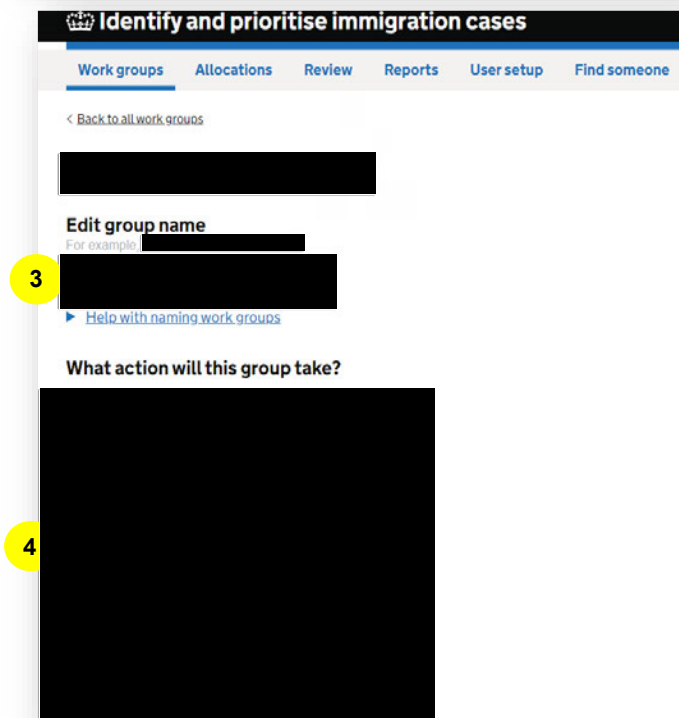
In practice, this means all groups should be named as outlined below:



E.g. a group that contains



- 4 Select the action this group will be taking.



Creating a Work Group (2 of 2)

Search and add caseworkers

Enter the caseworker's POISE ID and add them to the group

5 6 Add caseworker

► [I can't find a caseworker](#)

Search and add caseworkers

Enter the caseworker's POISE ID and add them to the group

Add caseworker

► [I can't find a caseworker](#)

Caseworkers in this group

7 Remove

Caseworkers in this group

Remove

8 Create

- 5 Enter the POISE ID of the user to add to the group and select their name from the drop down when it appears.

Note, caseworkers will need to be added to IPIC before they appear in the drop down – see Editing User Permissions.

You CAN create work groups with no caseworkers

- 6 Click the 'Add caseworker' button to add the user to the group.

Repeat steps 5 and 6 to add more caseworkers.

- 7 If you want to remove a caseworker from the group, click the 'Remove' icon for that caseworker.

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

- 9 The work group has now been created.

Identify and prioritise immigration cases

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

< [Back to all work groups](#)

9

Created

Next steps

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

Editing a Work Group (1 of 2)

The screenshot shows a web application interface for managing immigration cases. At the top, there is a header bar with the title 'Identify and prioritise immigration cases' and a 'Log out' button. Below the header is a navigation bar with several tabs: 'Work groups', 'Allocations', 'Review', 'Reports', 'User setup', and 'Find someone'. The 'Work groups' tab is highlighted with a red box and a yellow circle containing the number 1. Below the navigation bar, the main content area is titled 'Work groups' and includes a link 'Help with work groups' and a 'Create group' button. Underneath, there is a section titled 'Existing work groups' which contains a table. The table has four columns: 'Name of group', 'Number of caseworkers', 'Recommended cases', and 'Actions'. There are two rows of data in the table, both with redacted names and actions. The 'Edit group' link in the 'Actions' column of the second row is highlighted with a red box and a yellow circle containing the number 2.

Identify and prioritise immigration cases Log out

1 **Work groups** Allocations Review Reports User setup Find someone

Work groups

[Help with work groups](#)

Create group

Existing work groups

Name of group	Number of caseworkers	Recommended cases	Actions
[Redacted]	1	0	[Redacted] Edit group
[Redacted]	1	0	[Redacted] 2 Edit group

1 Click the 'Work groups' tab.

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

Editing a Work Group (2 of 2)

Identify and prioritise immigration cases

Work groups | Allocations | Review | Reports | User setup | Find someone

< Back to all work groups

Edit group name

1 [Redacted text box]

[Help with naming work groups](#)

What action will this group take?

2 [Redacted dropdown menu]

Search and add caseworkers

Enter the caseworker's POISE ID and add them to the group

3 [Redacted search bar] [Add caseworker](#)

[I can't find a caseworker](#)

Caseworkers in this group

4 [Redacted caseworker name] [Remove](#)

5 [Save changes](#) [Delete group](#) 6

- 1 To edit the group name, click in the 'Group name' box and enter the new / amended group name.
- 2 To change the action of the group, select the new action.
- 3 To add a Caseworker to a group, type the caseworkers poise in the search bar and select their poise from the options. Click the 'Add caseworker' button
- 4 To remove a Casework from a group, click the 'Remove' icon for that Caseworker.
- 5 Click the 'Save changes' button once the required changes have been made. Alternatively click 'Leave without saving' to discard changes and leave the group as it was configured before.
- 6 If the 'Delete this group' icon is clicked, IPIC will request confirmation before deleting the group. To delete the group click 'Delete this group' button'. To keep the group click the 'Cancel' icon.

****If changing the action for the work group, please ensure that all filters are cleared, if you have used this group before.****

Allocations Tab

Applying Filters and Allocating Recommendations

Selecting a type of action

IPIC has an allocations tab where you can select which type of action you would like to allocate to a work group.

Identify and prioritise immigration cases

Work groups Allocations Review Reports User setup

Select a type of action

Type of action to allocate

Continue

1 Click on the 'Allocations' tab

2 Select which action to allocate.

You will only see action type you have permissions to see. If you have access to multiple (or all) action types, these will appear as buttons to select as per the picture.

2a

2a Some of the rules have options within them.

These give you the option to select either

2a

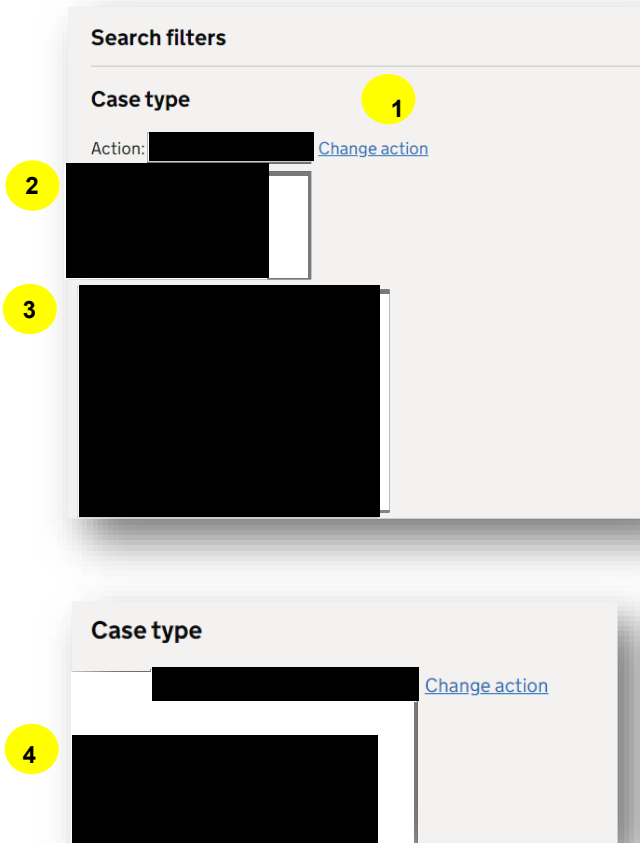
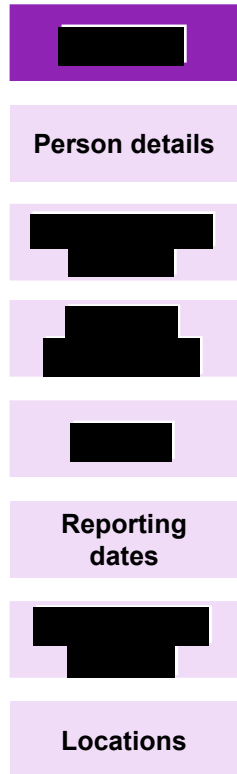


Please contact the [redacted] if you think your permissions are wrong or need changing.

Applying Filters

Filter recommendations and allocate them to work groups.

Available Filters



1 You can change the case type by selecting the 'Change action' link. IPIC now has the option to look at [Redacted] recommendations.



Applying Filters

Set a priority for recommendations to be presented to IPIC Caseworkers via the 'Get Next' function.

Available Filters

1



Person details



Reporting
dates

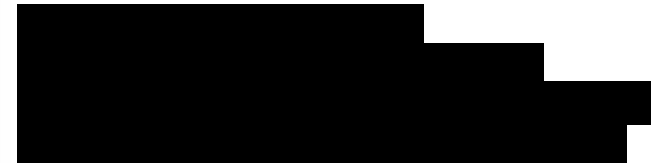


Locations



1

Select the appropriate prioritisation type from the list.



Applying Filters – Person Details

IPIC will provide recommendations for [REDACTED] or you can filter for a specific age range.

Please refer to the rules document for additional information.

Available Filters



Person details



Reporting dates



Locations

Person details

Age

☐ All

☒ Only include

[REDACTED]

Nationality

☐ All

☒ Only include

Country of nationality

Add country

[REDACTED]

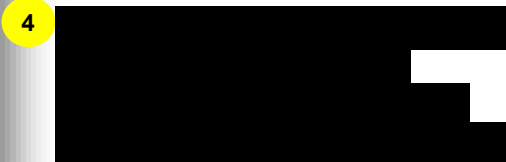
☐ Only exclude

[REDACTED]

1 The age filter can be set to a specific age range by clicking 'only include' and then own ages can be inputted. Or you can include all ages by clicking 'all'.

2 The Nationality filter can be set to include all nationalities by clicking 'all'. You can decide if they want to see results only including or excluding a certain nationality.

3 You can select a country of nationality that they wish to be included or excluded as above and then click 'add country'. You can select multiple countries.



Available Filters

- [Redacted]
- Person details
- [Redacted]
- [Redacted]
- [Redacted]
- Reporting dates
- [Redacted]
- Locations

1a

1b

2

3

1a You can chose to see [Redacted]

1b You can also chose to select [Redacted]

2 You can also click on [Redacted]

3 You can opt to [Redacted]

Applying Filters

Available Filters

Person details

Reporting dates

Locations

1

2a

2b

2a

3

1

You can chose to

2a

To only

2b

Repeat as necessary. You can remove these if needed.

3

Applying Filters

Available Filters

[Redacted]

1

Person details

2a

2b

[Redacted]

4

[Redacted]

[Redacted]

Reporting
dates

3

[Redacted]

Locations

[Redacted]

[Redacted]

1

IPIC will return all
recommendations

2a

2b

4

3

Repeat as necessary.



Please note:

Please see the 'IPIC for
RP 2 Business Rules Explained' document for full
rule details.

Applying Filters – Reporting Date Range

IPIC can return recommendations for people who are reporting [REDACTED]

Available Filters



Person details



Reporting dates



Locations



Reporting date range


Start date

For example, 27 3 2007

Day Month Year 

End date

For example, 27 3 2007

Day Month Year 

1

Reporting date range

Start date

For example, 27 3 2007

Day Month Year 

End date

For example, 27 3 2007

Day Month Year 

2

Reporting date range


Start date

For example, 27 3 2007

Day Month Year 

End date

For example, 27 3 2007

Day Month Year 

☐ Only search for cases with dates

Locations

1 You can filter for recommendations [REDACTED]

2 You can filter for individuals who are reporting within a date range.

3 If you select the calendar icon, it will open up a full calendar for you to select your dates easier – you can type the dates in too, if preferred.

3

Applying Filters

Available Filters

☐

Person details

☐☐☐

Reporting
dates

☒

Locations

1

2

3

4

1

By default IPIC will return all recommendations

2

You can filter recommendations based on

3

Optionally,

4

Or, tick the box to return all recommendations that have an updated

Applying Filters – Locations

IPIC can return recommendation across all ROM or ICE regions (default), or only include / exclude from specific ROM or ICE regions.

Available Filters



Person details



Reporting dates



Locations

Locations
Reporting offender management (ROM) region

1 ☒ All
☐ Only include
☐ Only exclude

Locations
Reporting offender management (ROM) region

2 ☐ All
3 ☒ Only include

ROM region
Select ROM region to include ▼

☐ Only exclude

Immigration compliance enforcement (ICE) region

4 ☐ All
5 ☐ Only include
☒ Only exclude

ICE Region
Select ICE region to exclude ▼

- 1 IPIC will return recommendations across all ROM and ICE regions by default.
- 2 You can select the 'only include' OR 'only exclude' button and then select from the drop down menu of ROM regions.
- 3 Select the desired ROM region(s) and they will be listed as shown. You can enter further reporting centres and repeat as necessary.
- 4 Select the 'only include' OR 'only exclude' button and then select from the drop down menu of ICE regions.
- 5 Select the desired ICE regions and they will be listed as shown. You can enter further ICE regions. Repeat as necessary.

Applying Filters to Work Groups

1

Once all filters have been configured, click 'Apply Filter' and the recommendations will be ready to allocate to a work group.

This will be shown at the bottom of the page.

1

Apply filters

Hide filters

[Reset filters](#)

Locations

Reporting offender management (ROM) region

- ☒ All
☐ Only include
☐ Only exclude

Immigration compliance enforcement (ICE) region

- ☒ All
☐ Only include
☐ Only exclude

Apply filters

Hide filters

[Reset filters](#)

Work group

Select a group to allocate cases to

Set filters and allocate all (21)

Select all

- | <input type="checkbox"/> | Reporting date |
|--------------------------|----------------|
| <input type="checkbox"/> | 19 Nov 2022 |
| <input type="checkbox"/> | 19 Nov 2022 |
| <input type="checkbox"/> | 19 Nov 2022 |

Allocating Recommendations to a Work Group

Work group

Select a group to allocate cases to

2

3 Set filters and allocate all (21)

5 Allocate selected (0)

Select all

4

- 1 The recommendations will be presented in a list view. The list is prioritised according to the selection made in the above filters

Continuously allocating to a Work group

- 2 Use the drop down menu to select the group to which the recommendations will be continually applied.
- 3 Click 'Set filters and allocate all' to allocate the recommendations to the group selected in Step 1. Set filters and allocate all will allocate all of the recommendations to the selected work group **and** IPIC will **continuously monitor data** to add or remove recommendations that meet or stop meeting the criteria that you have set. This will continue until a Manager stops the allocation through the Review tab.

Allocating specific recommendations to a Work group

- 4 Select the recommendation(s) to assign to the group by ticking the check box next to each recommendation.
- 5 When at least one recommendation has been ticked, an 'Allocate selected' button will appear. Click this to assign the recommendation(s) to the work group.

Immigration compliance enforcement (ICE) region

☒ All

☐ Only include

☐ Only exclude

Apply filters Hide filters Reset filters

Work group

Select a group to allocate cases to

Set filters and allocate all (3) Allocate selected (0)

Select all



If you need to adjust the filters after seeing the number of recommendations, simply scroll up, adjust the filters and press 'Apply filter', your recommendations will then be updated.

Note, if a selected recommendation 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 'Set filters and allocate all' or 'Allocate 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 recommendations to review.

Allocating Recommendations and Groups (1 of 2)

The way that filters and allocating work 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 to one Group:

[Redacted]

[Redacted]

Result:

[Redacted]

Example 2 – Apply two different filters to two Groups:

[Redacted]

Result:

[Redacted]

[Redacted]

However,

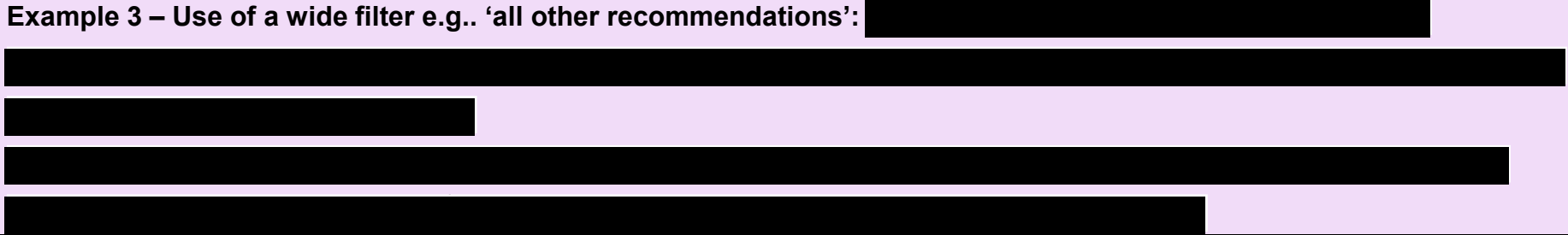
[Redacted]

[Redacted]

[Redacted]

Allocating Recommendations and Groups (2 of 2)

Example 3 – Use of a wide filter e.g.. ‘all other recommendations’:



Review Tab

Reviewing Recommendations and Editing Filters

Review Tab – Reviewing Recommendations

View the number and detail of Recommended, Accepted, Rejected, and On Hold recommendations across the work groups you have access to. Review tab is also used to view or edit the filters that assign recommendations to each work group.

Identify and prioritise immigration cases Log out

Work groups Allocations **Review** Reports

Review

[Help with reviewing cases](#)

Work group
Select a group to review

1 [Redacted]

2 Recommended (21) Accepted (0) Rejected (0) On hold (0)

Recommended cases

Review the actions IPIC has recommended to take on cases.

[Edit filters set to this group](#)

Reporting date	Action	Name	CEPR or PID	Country of nationality
[Redacted]				



Recommended shows the number of recommendations that IPIC has found that meet the criteria for the selected work group you are reviewing. recommendations are prioritised by the interaction type specified when allocating.

Accepted, Rejected, and On hold show the number of recommendations assigned to each state in the group.

- 1 Select the work group to be reviewed or have its filter edited.
- 2 To review the recommendations that are currently Recommended, Accepted, Rejected, or On Hold for the group, click the associated tab.
- 3 To review an individual recommendation within the Recommended, Accepted, Rejected, or On Hold tab, click on the name of the individual.

Reviewing A Recommendation

- 4 Review the information stored within each of the tabs by clicking on the links
- 5 Review data on IPIC **AND** data held on the Home Office Case Management system(s) (e.g.. CID / Atlas) before deciding whether IPIC has appropriately recommended the individual for the given intervention action:
 - To **Accept** a recommendation proceed to [slide 31](#)
 - To **Reject** a recommendation proceed to [slide 32](#)
 - To place a recommendation **On Hold** proceed to [slide 34](#)

Identify and prioritise immigration cases Log out

Work groups Allocations **Review** Reports User setup Find someone

< [Back to review recommended cases](#)

This is the action that IPIC has provided a recommendation for.

4 **Person details**
Documentation
Reporting details
Barriers
Harm
Family status
Vulnerability

5 **Person details**

Full name
Home Office reference
Person ID
Duplicate person ID(s)
Date of birth
Country of nationality
Gender
Red notice status

Accept
Reject
Place on hold

Accepting a Recommendation

The screenshot shows the 'Identify and prioritise immigration cases' interface. The 'Review' tab is selected. On the left, under 'Person details', the 'Accept' button is highlighted with a red box and a yellow circle labeled 6. The main area shows a form for 'Person details' with fields for Full name, Home Office reference, Person ID, Duplicate person ID(s), Date of birth, Country of nationality, Gender, and Red notice status. A large black redaction box covers the right side of the form.

6 Click 'Accept'.

7 You must confirm that they have recorded any updates to the recommendation in CID / Atlas by clicking 'Submit' e.g. [redacted]

8 IPIC will confirm the recommendation had been Accepted.

At this point you can either:

9a Return to review recommended cases

9b View the 'Accepted' tab

The screenshot shows the 'Accept case' screen. A warning message states: 'You must record any updates to this case in CID or ATLAS.' Below the message, the 'Confirm' button is highlighted with a red box and a yellow circle labeled 7.

The screenshot shows the 'Accepted' screen. A large green box with the word 'Accepted' is centered. Below it, the 'View accepted cases' button is highlighted with a red box and a yellow circle labeled 9b. A yellow circle labeled 8 is also present near the top left of the green box. A yellow circle labeled 9a is near the top left of the screen, pointing to the 'Back to review recommended cases' link.

Rejecting a Recommendation

Identify and prioritise immigration cases

Work groups Allocations **Review** Reports

< Back to review recommended cases

Person details

Documentation

Reporting details

Barriers

Harm

Family status

Vulnerability

Accept

Reject

Place on hold

Person details

Full name

Home Office reference

Person ID

Duplicate person

Date of birth

Country of nationality

Gender

Red notice status

6 Click 'Reject'

7 Tick one (or more) Rejection Reasons

8 Explain the reason(s) for rejecting the recommendation. This will assist in identifying issues in the business rules and/or data.

9 Click 'Confirm'

Identify and prioritise immigration cases

Work groups Allocations **Review** Reports User setup Find someone

Why do you want to reject this case?

or

☐ Reason not listed

Detail on reason for rejecting this case (optional)

You have 500 characters remaining

Confirm Cancel

9

Identify and prioritise immigration cases

Work groups Allocations **Review** Reports User setup Find someone

< Back to review recommended cases

Rejected

10b View rejected cases

At this point you can either:

10a Return to the 'Recommended' tab

10b View the 'Rejected' tab

For rejected recommendations, users should make updates to other Home Office systems (e.g.. CID / Atlas) where applicable.

This will assist in preventing the individual being recommended again and routed elsewhere in the future.

Please note – Rejection reasons available will differ dependent on the action and

[illegible]

To note –

Putting a Recommendation On Hold

Identify and prioritise immigration cases

Work groups Allocations **Review** Reports

< Back to review recommended cases

Person details

Documentation

Reporting details

Barriers

Harm

Family status

Vulnerability

Accept

Reject

Place on hold

Identify and prioritise immigration cases

Work groups Allocations **Review** Reports User setup Find someone

Why do you want to place this on hold?

☐ Manager escalation

or

☐ Other

Detail on reason for placing this case on hold (optional)

You have 500 characters remaining

Confirm Cancel

You must record any updates to this case in CID or ATLAS.

Identify and prioritise immigration cases

Work groups Allocations **Review** Reports User setup

< Back to review recommended cases

Placed on hold

View cases on hold



When should I place a recommendation On Hold?

'Place on hold' is a temporary status and should be used only to 'park' recommendations for a short time. It must not be routinely used to manage recommendations.

Please note recommendations will not reflow and will remain on hold until it is accepted, rejected or the work group is deleted.

- 6 Click 'Place on hold'
- 7 Select a reason for placing the recommendation temporarily on hold
- 8 Explain the reason for placing the recommendation on hold.
- 9 Click 'Confirm'

- 10 IPIC will confirm that the recommendation has been placed on hold

At this point you can either:

- 11a Return to the 'Recommended' tab
- 11b View the 'On Hold' tab

→ See the [next slide](#) for when the you are ready to take the recommendation off hold and either Accept or Reject it.

Reviewing an On Hold Recommendation and Updating the Decision

Identify and prioritise immigration cases Log out

Work groups Allocations **Review** Reports User setup Find someone

Review

[Help with reviewing cases](#)

Work group
Select a group to review

Recommended (3) Accepted (1) Rejected (1) **On hold (1)**

Recommended cases
Review the actions IPIC has recommended to take on cases.
[Edit filters set to this group](#)

Identify and prioritise immigration cases Log out

Work groups Allocations **Review** Reports User setup Find someone

Review

[Help with reviewing cases](#)

Work group
Select a group to review

Recommended (3) Accepted (1) Rejected (1) **On hold (1)**

Cases on hold

Here you will see the reason that was selected when the recommendation was placed on hold, the POISE ID of the user who made the decision and the date it was placed on hold.

- 1 Load the On hold tab from the relevant work group.
- 2 You should locate and click on the name of the individual which needs to have the decision updated.
- 3 You can view the reasons the recommendation was placed on hold. They also have the ability to edit the details if needed.
- 4 You should review the data held on IPIC and other case management systems (i.e. CID / Atlas) before changing the decision of whether IPIC appropriately recommended the individual for the action
 - If you need to Accept the recommendation see [slide 31](#)
 - If you need to Reject the recommendation see [slide 32](#)

Identify and prioritise immigration cases Log out

Work groups Allocations **Review** Reports User setup Find someone

[Back to review on hold review cases](#)

Person details

Documentation
Reporting details
Barriers
Harm
Family status
vulnerability

Full name
Home Office reference
Person ID
Duplicate person ID(s)
Date of birth
Country of nationality
Gender
Red notice status

View reason on hold

Accept
Reject

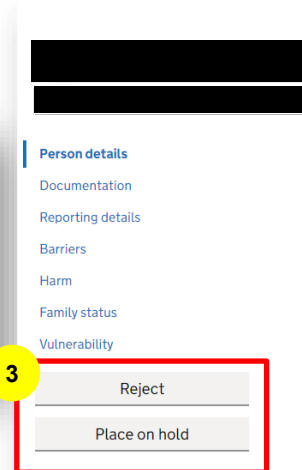
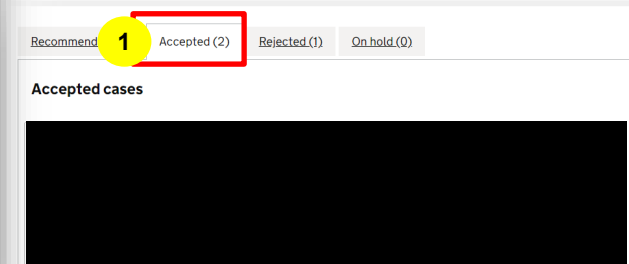
Identify and prioritise immigration cases

Work groups Allocations **Review** Reports User setup

Reasons for placing on hold

On hold reason
Date placed on hold
Placed on hold by
Details
[Edit these details](#)

Changing a Decision on Accepted/Rejected Recommendations



1 Load the Accepted or Rejected tab based on the previous decision assigned to the recommendation in the relevant work group.

2 You should locate and click on the name of the individual which needs to have the decision changed.

3 You should review the data held on IPIC and other case management systems (i.e. CID / Atlas) before changing the decision of whether IPIC appropriately recommended the individual for the action

→ If you need to Accept the recommendation see [slide 31](#)

→ If you need to Reject the recommendation see [slide 32](#)

→ If you need to place the recommendation On hold see

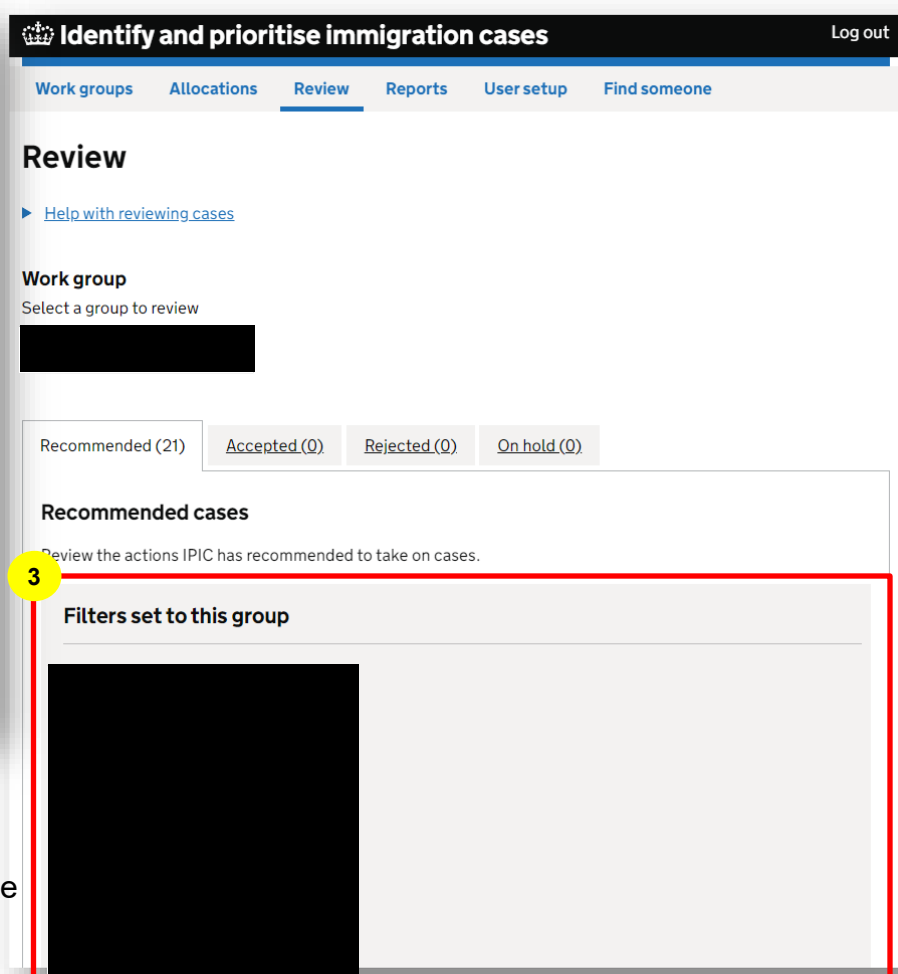
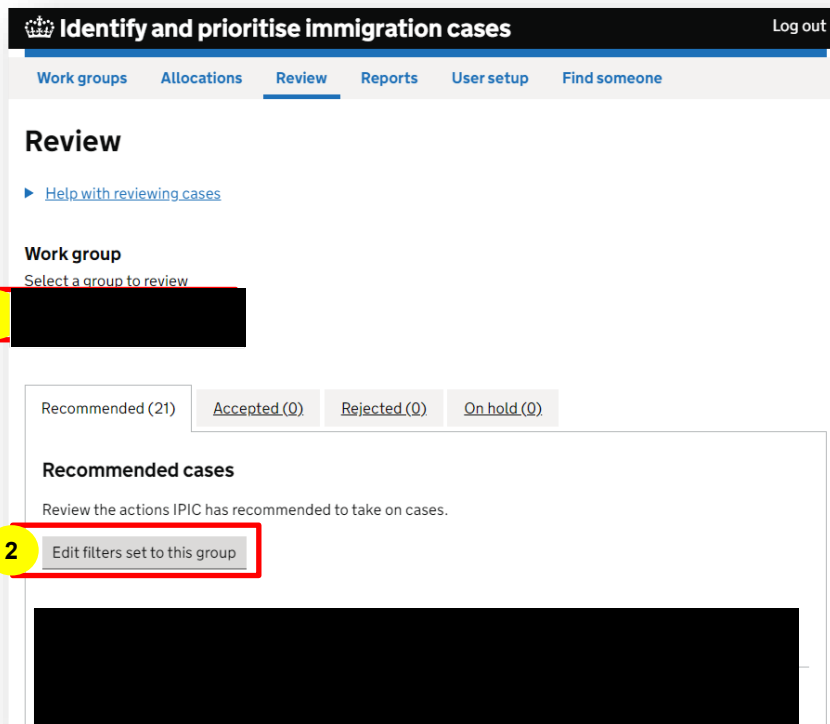
[slide 33](#)

Please note:

- Recommendations will stay on the 'Accepted' tab for 5 days
- Recommendations will stay on the 'Rejected' tab for 20 days
- Recommendations will stay on the 'On Hold' tab until the status is changed (no time limit)
- All recommendations, whether recommended, accepted, rejected or on hold are available to view in MI Report (see [Reports tab](#))

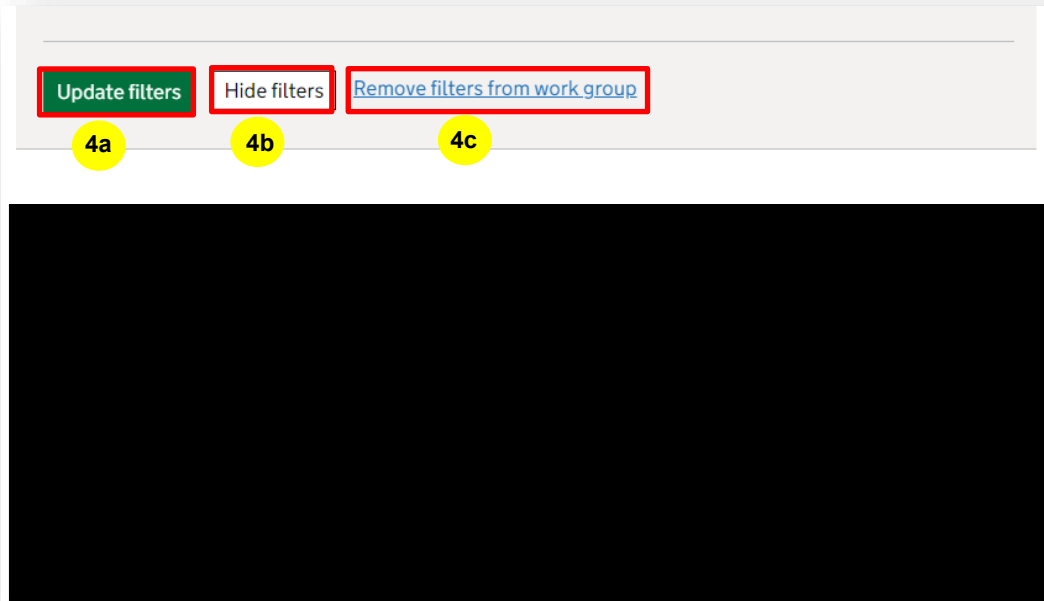


Review Tab – Editing filters (1 of 2)



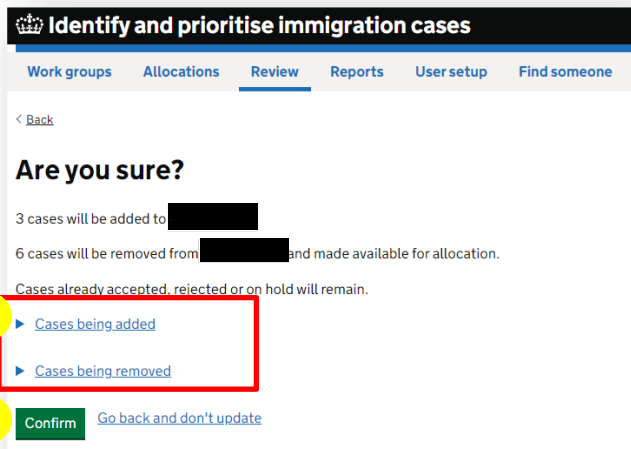
- 1 Select the work group to review or edit the filters on.
- 2 To view the current applied filters for the group, or make changes to the filter, click 'Edit filters set to this group'. This will make the filters visible in the same page.
- 3 Make the required changes to the filter.

Review Tab – Editing filters (2 of 2)



Either:

- 4a If changes have been made to the filter, click 'Update filters' to save these changes and update the recommendations.
- 4b Click 'Hide filters' to minimise the filter section. Any changes will display on the screen but will not apply to the work group unless you select the 'Update filters' button.
- 4c Click 'Remove filters from work group' to delete the filter from the work group.



- 5 If changes are being applied to a filter, or if a filter is being removed IPIC will tell you:
 - How many recommendations are being added to the work group
 - How many recommendations are being removed from the work group and therefore available for allocation in another work group

To view the list of recommendations that will be added and/or removed select 'Cases being removed' or 'Cases being added'.

- 6 Select 'Confirm' to apply the changes you have to apply or edit the filter.
Select 'Go back and don't update' to stop any of the changes.

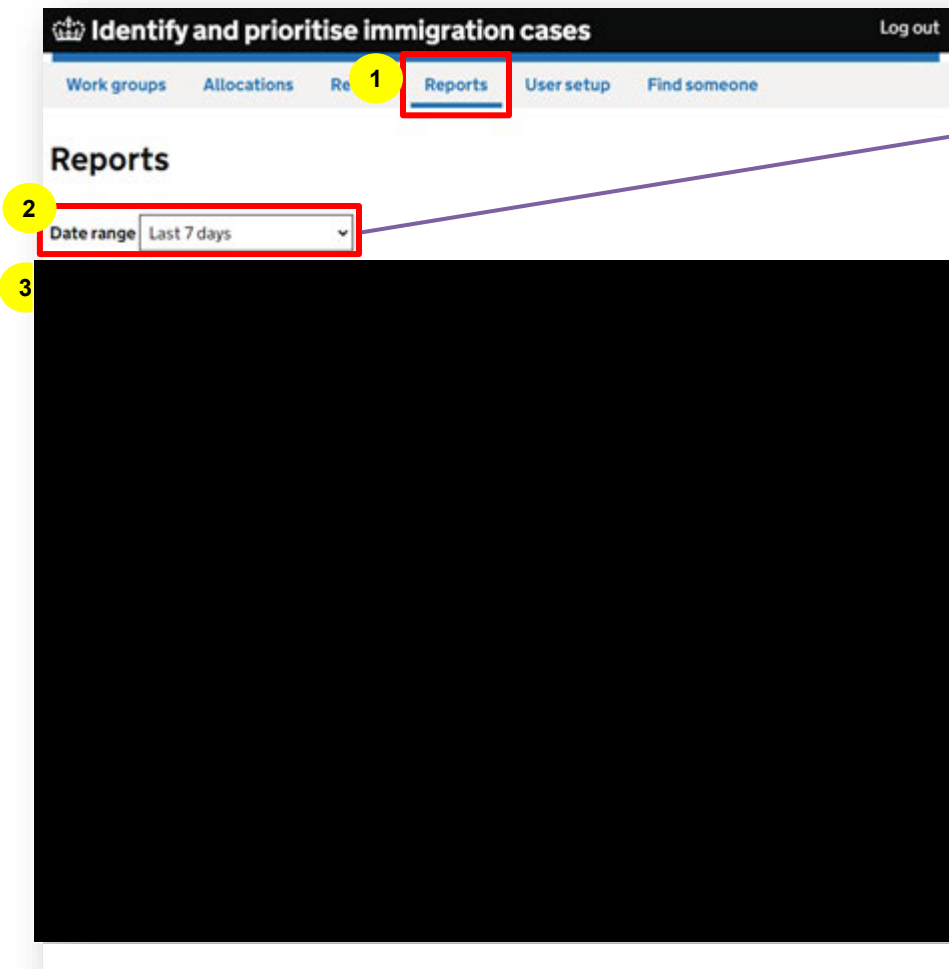
Reports Tab

Management Information (MI) Reports

MI Report (1 of 3)

This area of IPIC is used to display and download Management Information (MI) reports which show a breakdown of all undertaken activity on IPIC within a date range.

The MI Report functionality is available to all RP IPIC users.



Date range options are in the last 7 days, weekly over the last 4 weeks or monthly over the last 6 months.

- 1 Click 'Reports' to access the Reports tab.
- 2 Select the date range you wish to see IPIC MI for.
- 3 The business rules for the service will be displayed showing the total number of recommendations for the date range selected.

Select which business rule you would like to review.

MI Report (2 of 3)

Identify and prioritise immigration cases Log out

Work groups Allocations Review **Reports** User setup Find someone

< Back to reports

Date range Last 7 days

Top 5 regions

Total in work groups

- 4 To return to the main MI Reporting page select Back to reports at the top of the screen.
 - 5 This is the business rule the MI is being displayed for.
 - 6 Select a date range for the report. The last 7 days from yesterday is the default.
 - 7 The total number of recommendations is displayed. The trend information shows how many more or less recommendations there are based on the dates.
 - 8 The total number of cases **Accepted**, **Rejected** and **on hold** is displayed. The trend information shows how many more or less decisions in IPIC there have been based on the dates.
- Select the 'download' link to download a spreadsheet of the cases for the date range selected. See next slide for info on the download.
- 9 Additional MI drop downs will provide an overview of other key categories when expanded.

MI Report – Download (3 of 3)

This image shows an example of the MI report filled with dummy data. This slide explains what the fields in the report mean.

The MI reports contain information around when the recommendation was made in IPIC and by who (orange section), type of case (green), whether or not the recommendation was allocated to a work group (red section) and details around the decision made (blue section).

It also contains other useful information from Atlas such as name, date of birth, nationality.

From	To	Status	Status Updated	Current Flag	Current Status	Allocated	Allocated on
05/01/2023	11/01/2023	Accepted	06/01/2023 14:14	Y	Accepted	Y	10/12/2022 14:41
05/01/2023	11/01/2023	Accepted	09/01/2023 11:02	Y	Accepted	Y	10/12/2022 14:41
05/01/2023	11/01/2023	Accepted	09/01/2023 16:32	Y	Accepted	Y	10/12/2022 14:41
05/01/2023	11/01/2023	Accepted	10/01/2023 09:02	Y	Accepted	Y	10/12/2022 14:41

From – Start date of the report.

To – End date of the report

Intervention – The recommendation i.e. [REDACTED]

Person ID – PID

HO Ref – Home Office Reference number

Status – The status of the downloaded report, i.e. Accept/Reject/On Hold

Status Updated On - When the case was actioned in IPIC

Status Updated By - The POISE ID of the person who actioned the case

Current Flag – Shows if the status in the downloaded report is the current status or not, i.e. case was accepted but has since been changed to rejected/on-hold

Current Status – The current status of the case

Allocated – Shows if the case was allocated to a work group or not

Allocated on – Provides the date and time of allocation to a work group

Allocated to – Shows the name of the work group the case was allocated to at the time of decision

Allocated by – Shows the POISE ID of the person who last allocated the case to the work group

Rejection reasons – a 'Y' will be presented to show selection made e.g. [REDACTED]

Please note: that rejection reasons will differ by rule

On hold reasons – a 'Y' will be presented to show selection made e.g. [REDACTED]

On hold explanation – Shows details added by user

User Setup Tab

Editing User Permissions

Editing User Permissions

Identify and prioritise immigration cases

Work groups Allocations Review Reports **User setup** Find someone

Setup or find user

Enter user's POISE ID

View or edit

POISE ID		
Business unit	RP2	Change
Role	Manager	Change
Permissions		Change

What is their role?

POISE ID:

Business unit: **Returns preparation (RP)**

☐ Caseworker

☒ Manager

Continue

- 1 Select the 'User setup' tab
- 2 Enter the POISE ID of the user that you would like to edit. When their full POISE ID appears in the drop down menu, click on it.
- 3 Make the required amendments to the user's permissions including manger, caseworker and action types.
- 4 Click 'continue' to apply changes.
- 5 IPIC will confirm that the changes to the user have been updated.

Identify and prioritise immigration cases

Work groups Allocations Review Reports User setup Find someone

Updated

Next steps

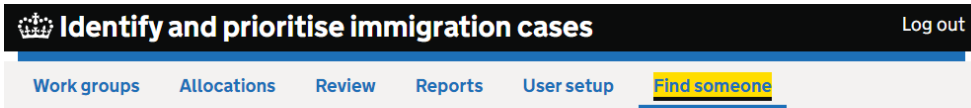
You can [set up or find another user](#)

If you need to remove someone's IPIC access please

Find Someone

Find Someone

The 'Find someone' tab of IPIC is used to find the details of all activity taken on an individual within RP's IPIC.

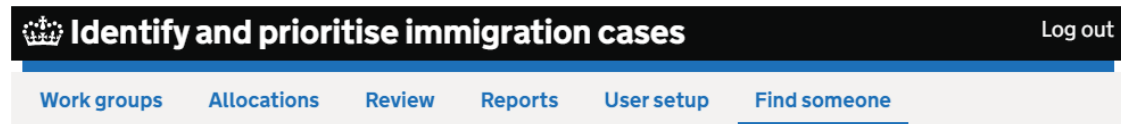


Find someone

Enter PID or HO reference

1

To find an individual, enter the PID or HO reference into the box and select the search button



Find someone

Enter PID or HO reference

Person ID	HO ref	Name	Action	Work group	Case status
-----------	--------	------	--------	------------	-------------

--	--	--	--	--	--

2

The list provided will display the action the person was recommended for, if the recommendation was allocated to a work group and what the status of the recommendation is (accepted, rejected, on hold) and the date the status changed.

If the name is a blue hyperlink you can select this to go to the recommendations details screen. [See slide 30.](#)

You cannot review the recommendation if it has been retracted (no longer meets the rule).

Find Someone

If a recommendation is still located within either the Recommended, Accepted, Rejected or On Hold tab, the Find Someone functionality allows users to view, make or amend a decision

 Identify and prioritise immigration cases Log out

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

[< Back to find someone](#)

Person details

Documentation
Reporting details
Barriers
Harm
Family status
Vulnerability

View rejection reasons

Accept

Place on hold

Person details

Full name

Home Office reference

Person ID

Duplicate person ID(s)

Date of birth

Country of nationality

Gender

Red notice status

 Identify and prioritise immigration cases Log out

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

Reasons for rejecting this case

Rejection reasons

Details

[Edit these details](#)

Please note:

- Cases will stay visible on the 'Accepted' tab for 5 days
- Cases will stay visible on the 'Rejected' tab for 20 days
- Cases will stay visible on the 'On Hold' tab until the status is changed (no time limit)
- All recommendations, whether recommended, accepted, rejected or on hold are available to view in MI Report (see Chapter 2).

Frequently Asked Questions

Frequently Asked Questions (1 of 2)

1. What is a manager in IPIC?

A 'manager' in IPIC only relates to the level of access that a given user has. It means that the user is able to set up work groups, allocate recommendations, review allocation filters and edit work groups that caseworkers are assigned to. A manager can also review recommendations for an action [REDACTED] and accept, reject, or place them on hold if required. The name of this role in IPIC does not relate to a given user's actual job title or grade.

2. What is a caseworker in IPIC?

A 'caseworker' in IPIC again only relates to the level of access that a given user has. It means that the user is able to review recommendations for an action that they have been assigned to by an IPIC manager, 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 recommendations from my search (e.g.. I don't want any of my team considering these).

When looking to allocate recommendations to a work group, you can use the filters on the allocations page to exclude specific criteria that is not appropriate for the work group created.

Alternatively, you can allocate the recommendations you wish to exclude to a work group and not allocate any caseworkers to it.

4. How does 'Get Next' work?

Get Next is functionality within the caseworker view of IPIC. Caseworkers will be presented with the next highest priority recommendation based on the prioritisation selected when allocating cases to the work group(s). If a caseworker is in 2+ groups, 'Get Next' will return the next available highest priority recommendations across those groups.

Frequently Asked Questions (2 of 2)

5. What happens if two people work on the same recommendation in IPIC?

This is very unlikely, but if two users clicked on a recommendation at the exact same time, they would both review the same individual. Both reviewers would be able to make a decision on the recommendation 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. We have had no instances being reported of this happening.

6. I'm a Manager – How can I give my team access to look at two or more actions (e.g., [REDACTED])

[REDACTED]
You can only have one intervention type per group so you would need to create separate [REDACTED] work groups and add the same people in your team to both groups.

7. [REDACTED]
[REDACTED]

8. [REDACTED]
[REDACTED]

For any issues or anomalies in IPIC please contact

