[redacted]

IPIC Digital Reporting - Manager Training Guide

Manager Training Guide

Changing a decision

Assurance

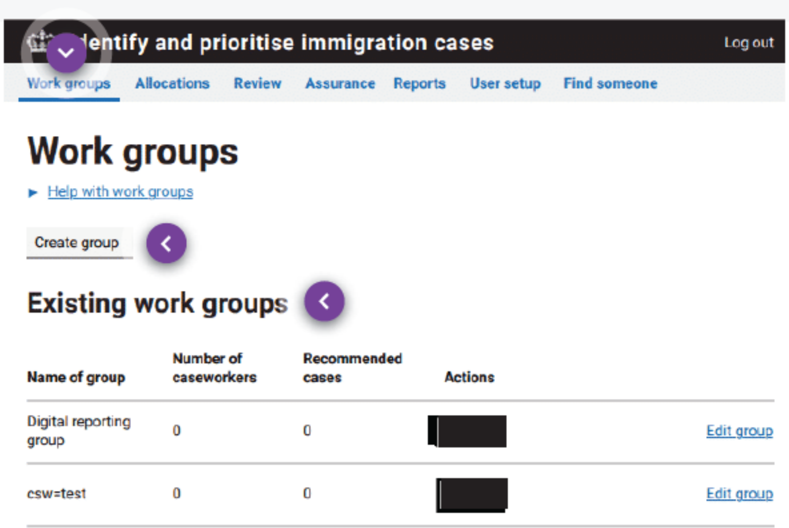
Editing a users permissions

Reports

Creating a work group

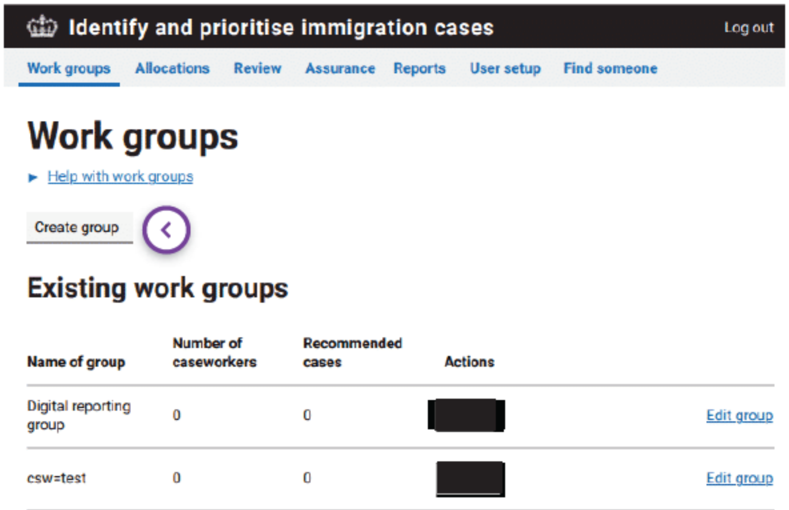
[redacted]

This section will show users how to create work groups in order to allocate work to them at a later stage.



Work Groups

To create a workgroup, select the work groups tab



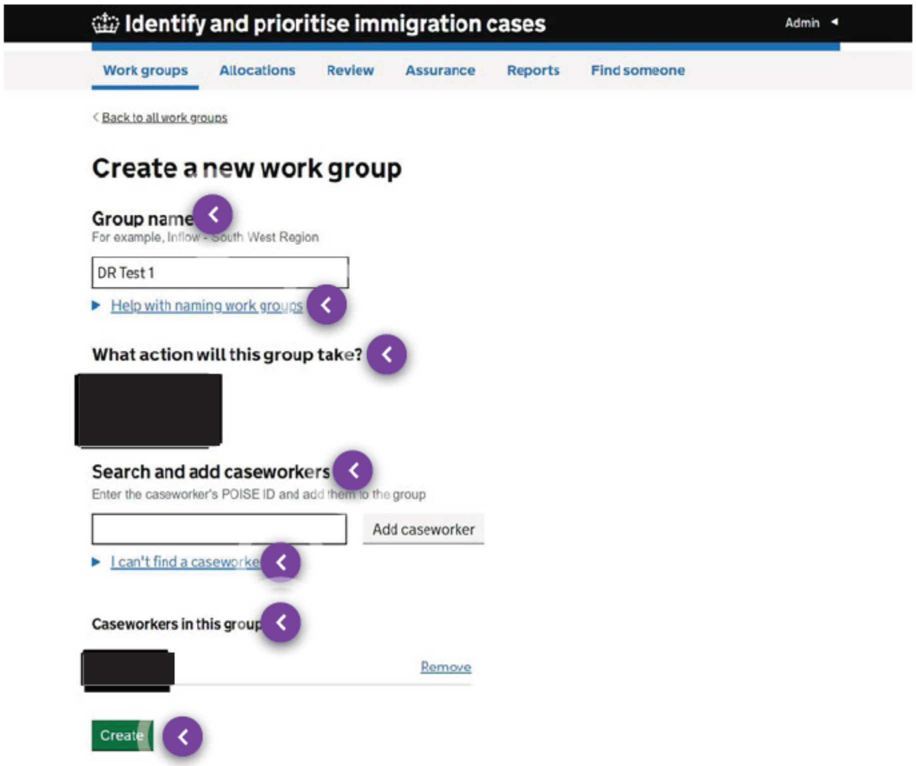
Create Group

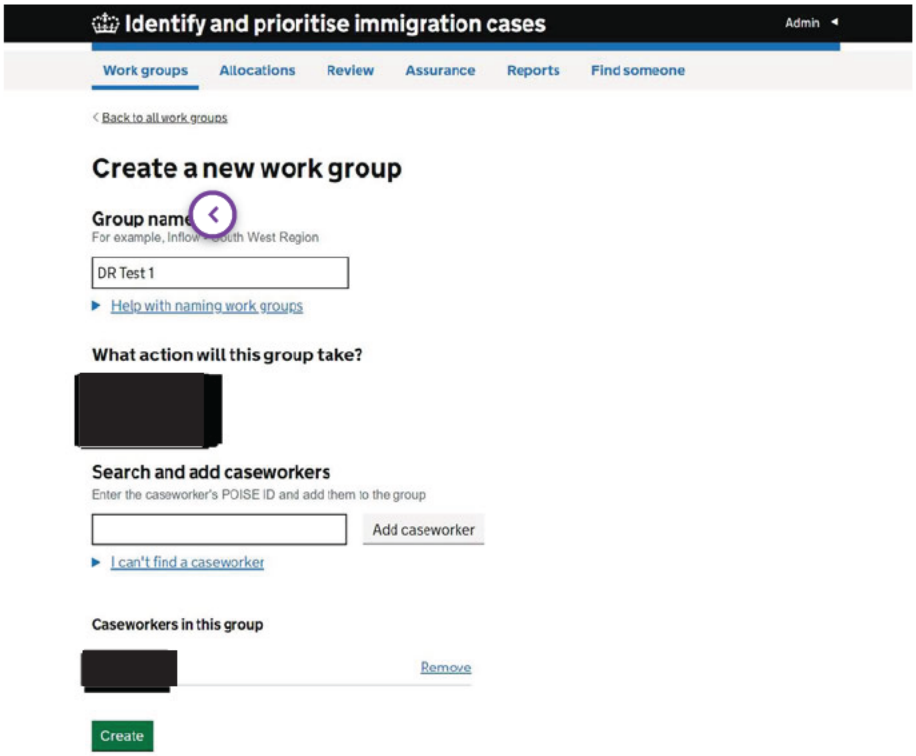
Select the create group button to generate a work group

Existing work groups

The user will only see the workgroups of the rules they have permissions for. e.g. user with [redacted] permissions will only see [redacted] workgroups, and would only see [redacted] as a selection when creating a group too

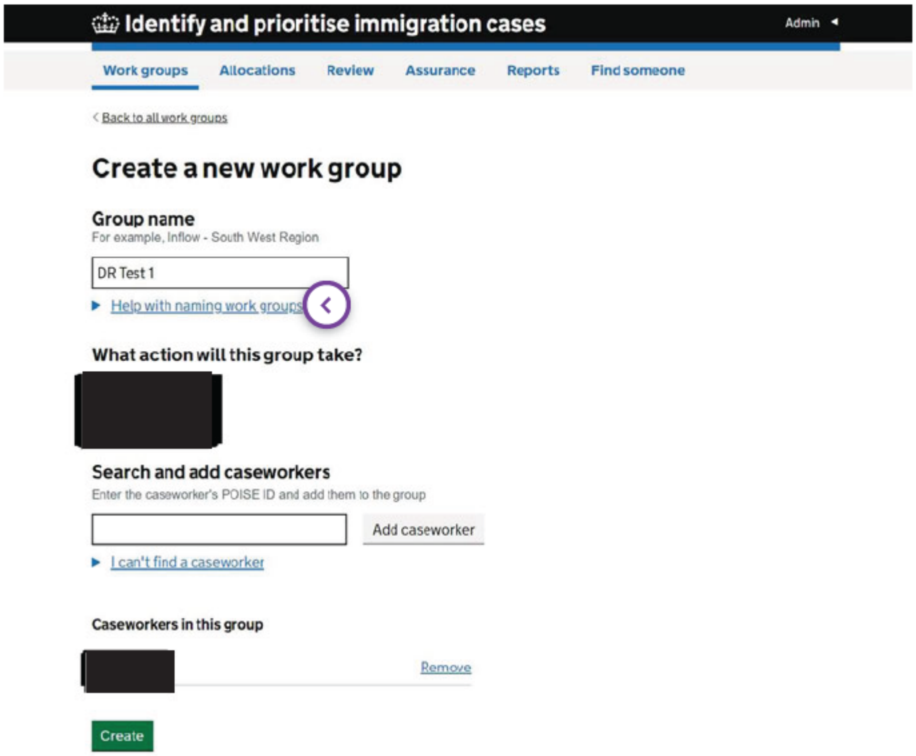
CONTINUE


Identify and prioritise immigration cases
Admin
Work groups
Allocations
Review
Assurance
Reports
Find someone
Back to all work groups
Create a new work group
Group name
For example, Inflow - South West Region
DR Test 1
Help with naming work groups
What action will this group take?
[redacted]
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
[redacted]
Remove
Create

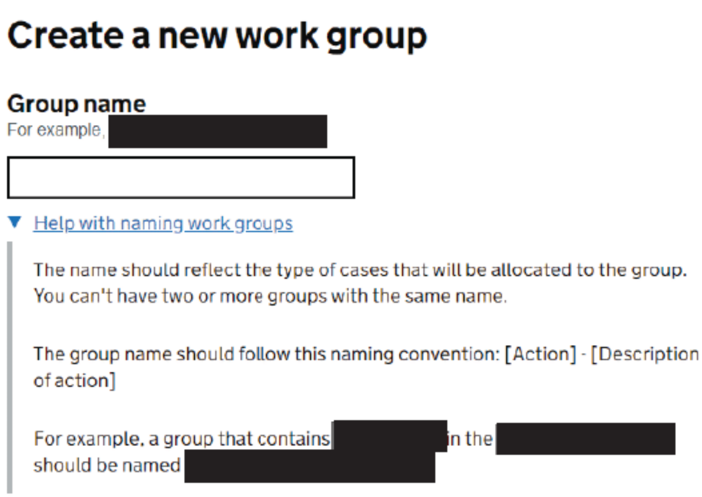


Group Name

Users will need to create a group name.

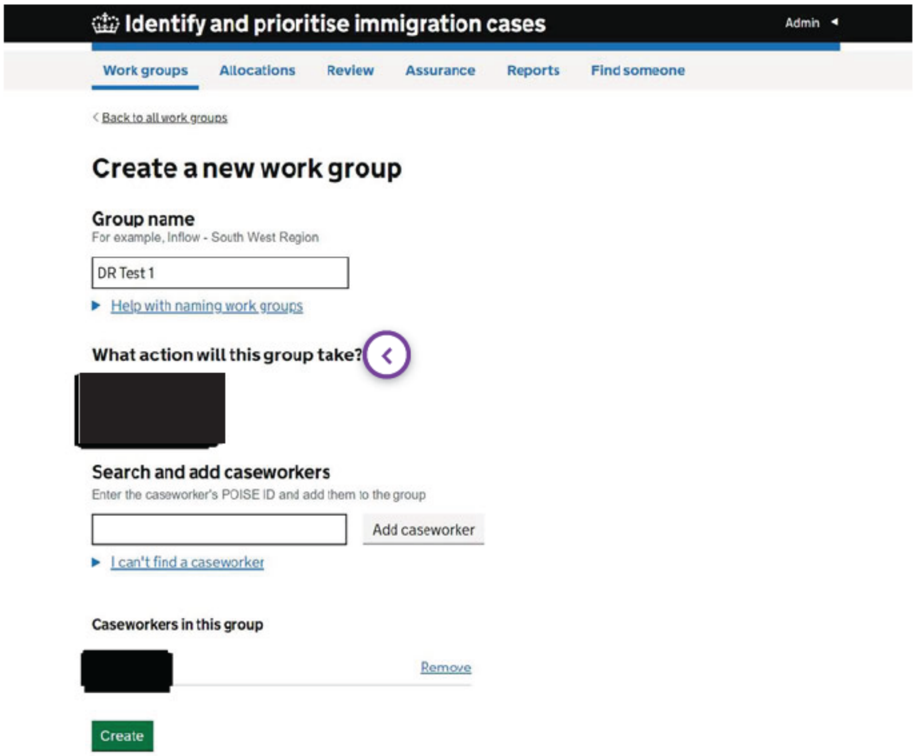


Help with naming work group



If the user is unsure how to name the work group, select 'help with naming work groups' and it will explain how to create a name.

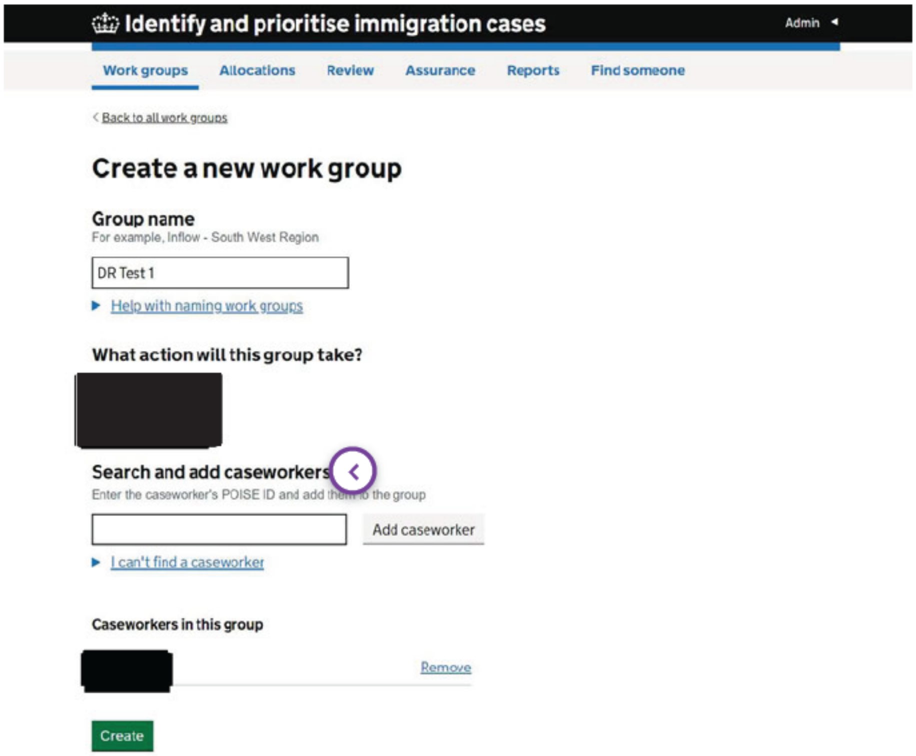
For example: [redacted]



Action

Users will now need to select what type of action this group will take

Please note: an action is a business rule

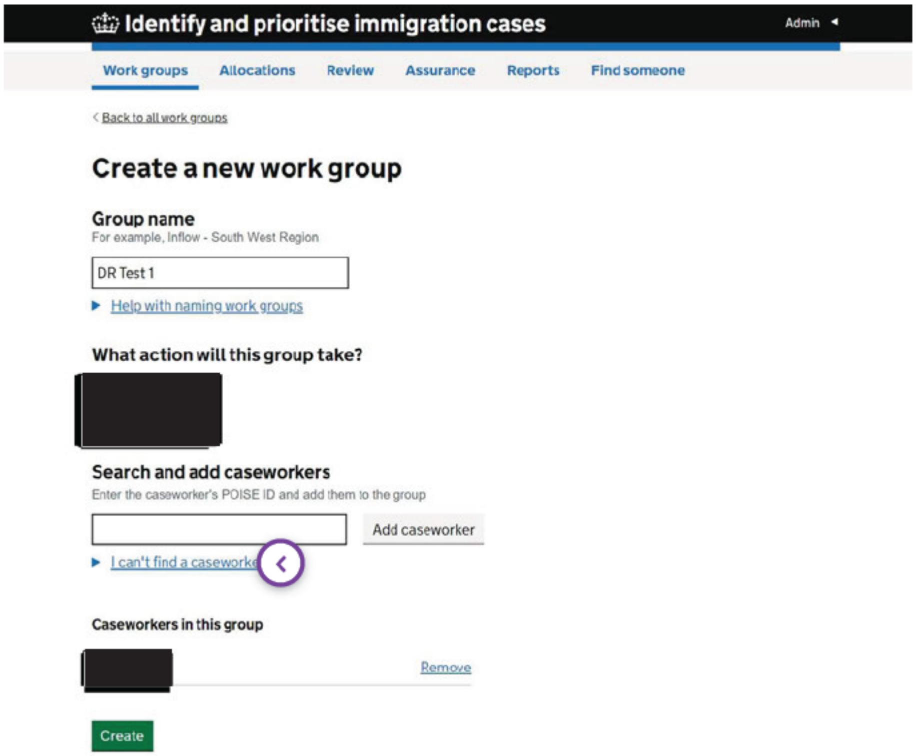


Add caseworker

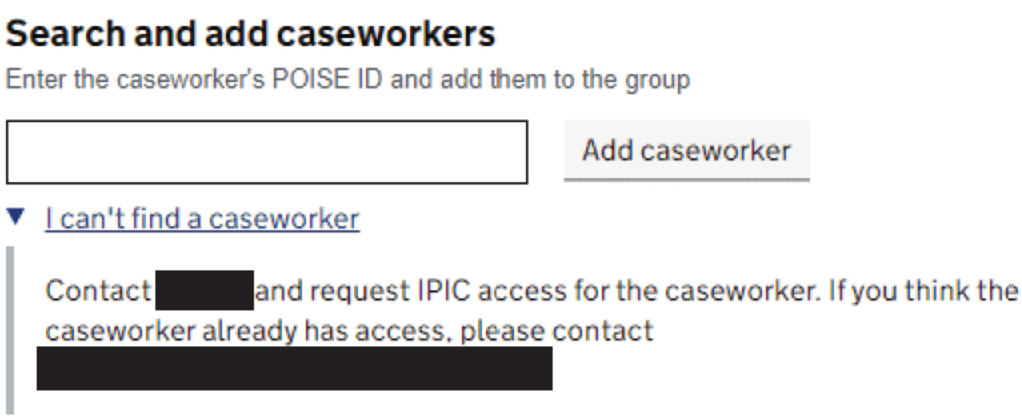
Users can now add caseworkers to this group by searching their POISE ID and when selected, click add caseworker.

Multiple caseworkers can be added to the group. However, it is not mandatory to add caseworkers to a workgroup

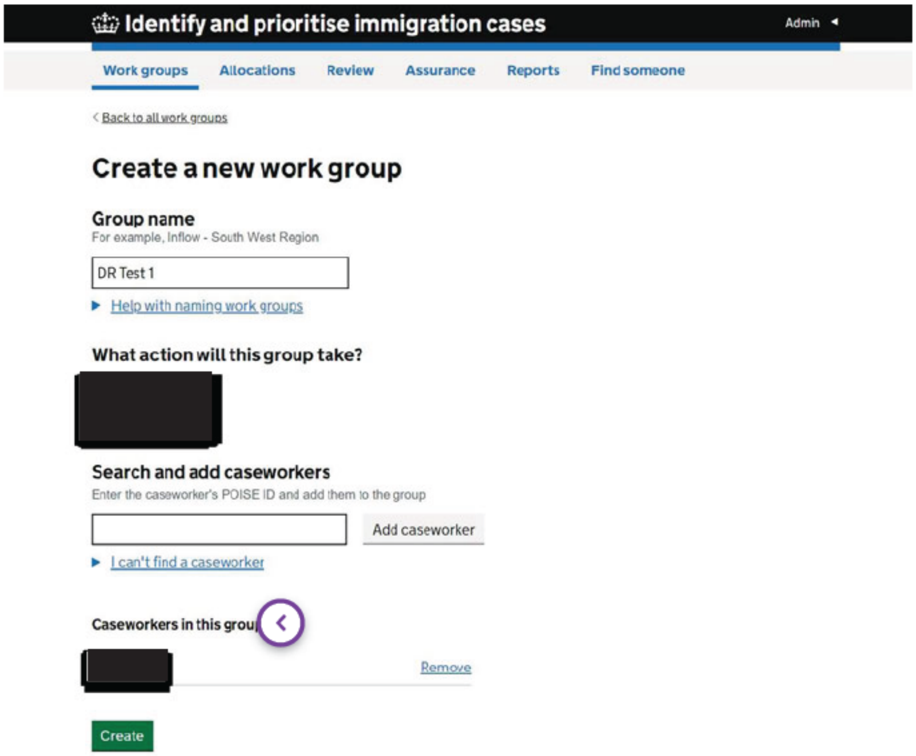
To get more help with this, select the 'I can't find a caseworker' link



Help finding a caseworker

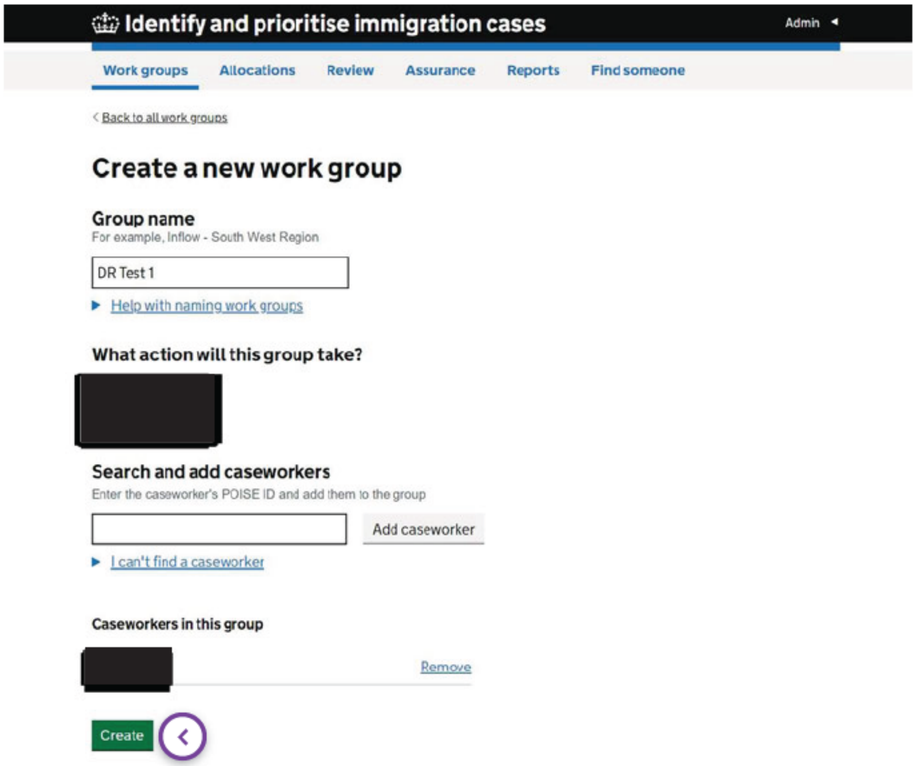


If help is required, select the 'I can't find a caseworker' link



Caseworkers in the group

Successfully added caseworkers will be visible here. All caseworkers within the work group will be listed here. If a caseworker is no longer required in this group, select remove



Create

Select create

CONTINUE


Identify and prioritise immigration cases
Admin
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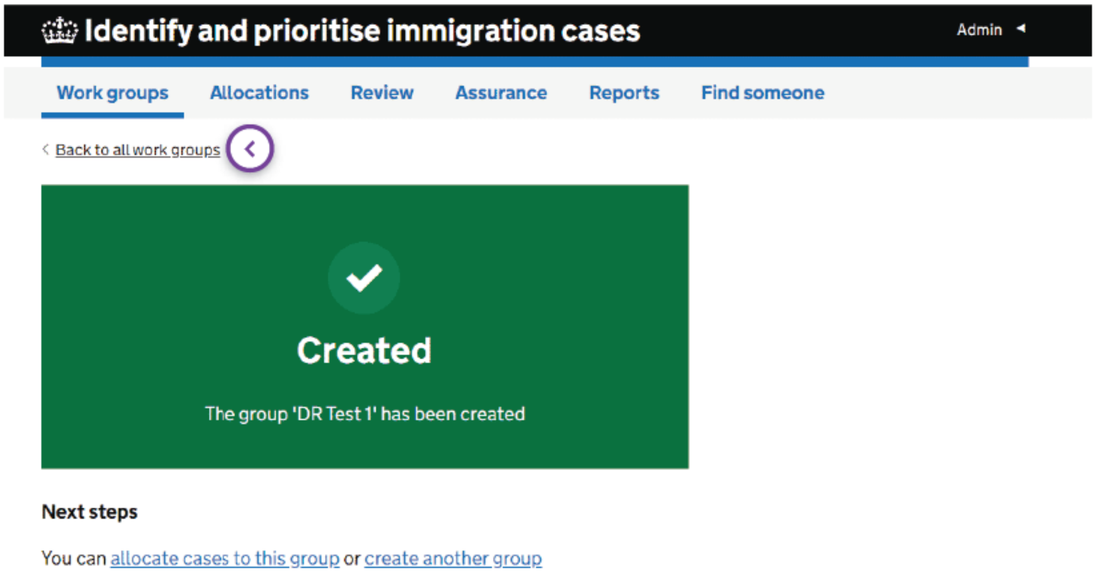
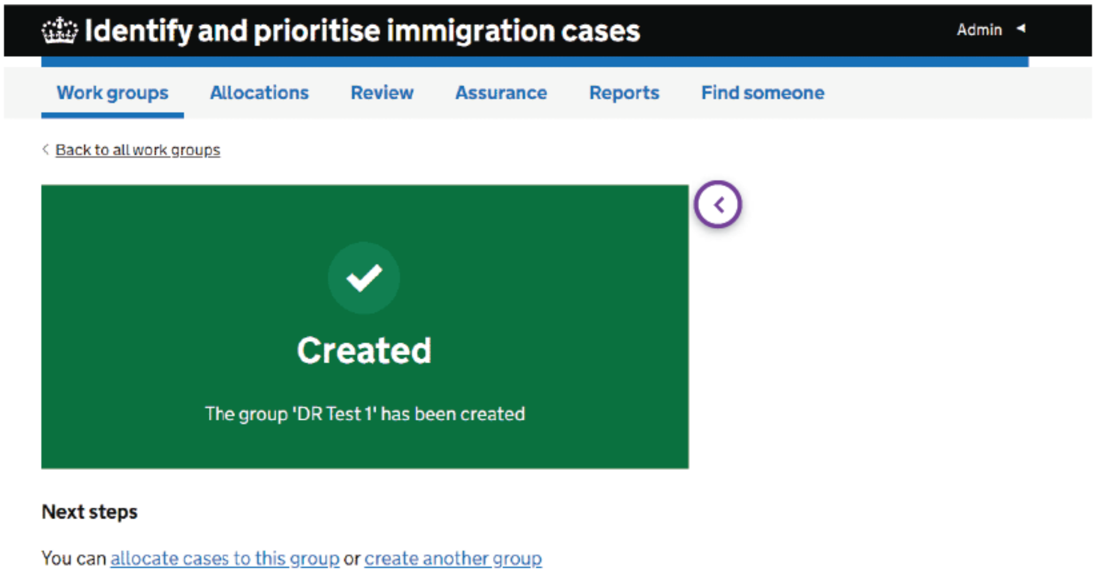
Allocations
Review
Assurance
Reports
Find someone
Back to all work groups
Created
The group 'DR Test 1' has been created
Next steps
You can allocate cases to this group or create another group



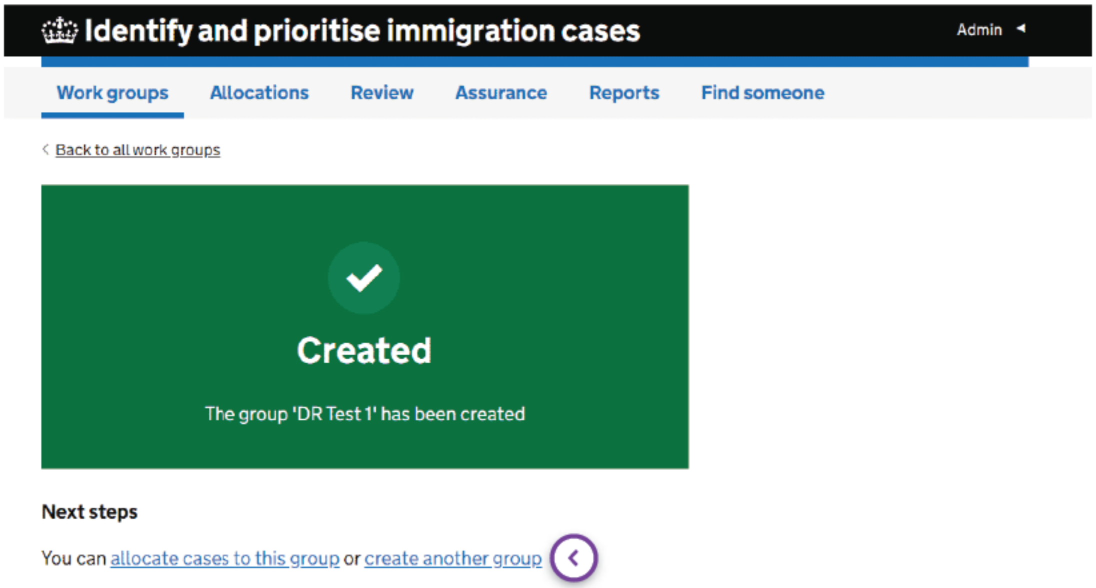
Back

You can now select back to view all groups



Created

Once created, users will be presented with a green box, showing that the workgroup has been successfully created



Next steps

Users can now allocate cases to this group - when this is selected, users will be taken to the allocations section.

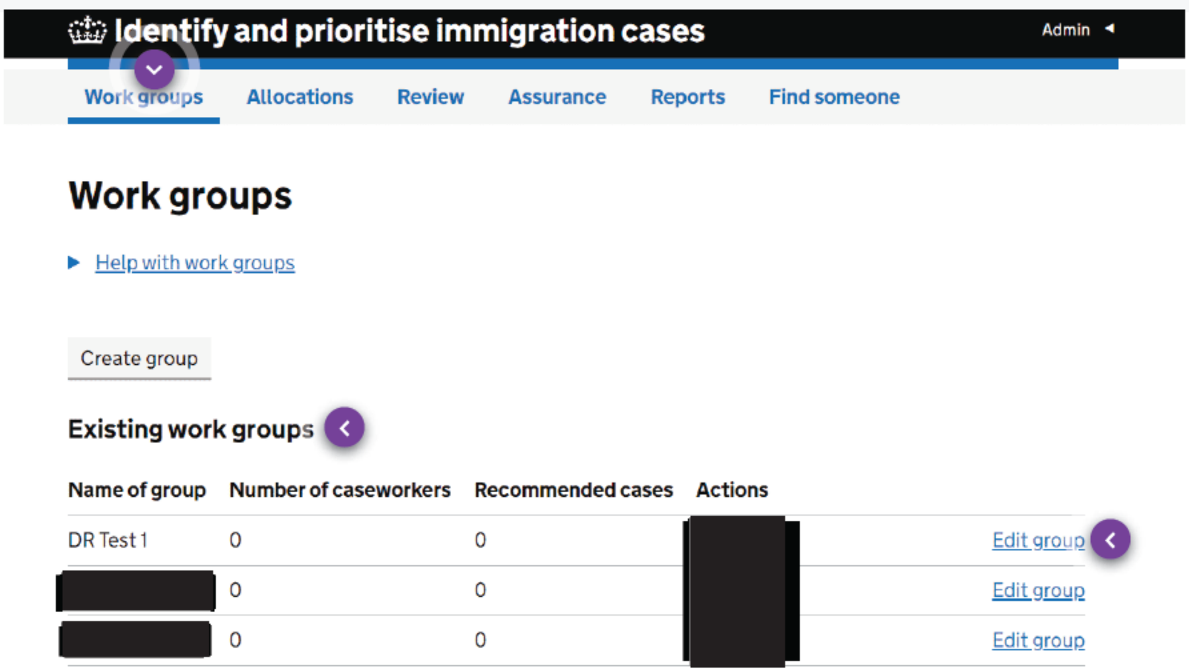
Or users can create another group and this will take you back to the steps previously seen, to generate a new work group

LESSON COMPLETE

Amending a work group

[redacted]

This section will show users how to amend existing work groups.



Identify and prioritise immigration cases

Admin

Work groups | Allocations | Review | Assurance | Reports | Find someone

Work groups

▶ Help with work groups

Create group

Existing work groups

Name of group	Number of caseworkers	Recommended cases	Actions	
DR Test 1	0	0	[redacted]	Edit group
[redacted]	0	0	[redacted]	Edit group
[redacted]	0	0	[redacted]	Edit group

Work groups

Select work groups

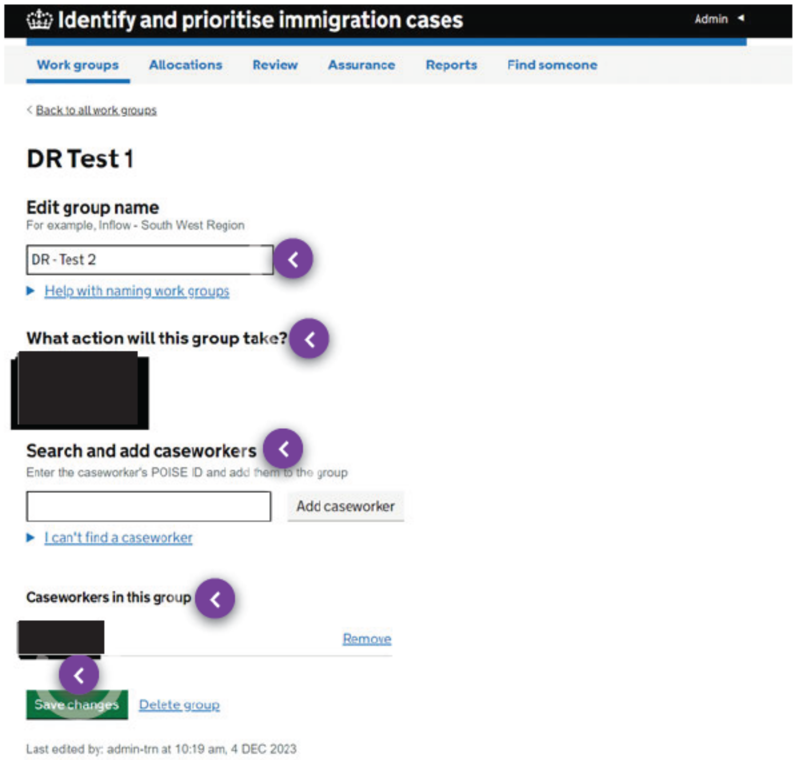
Existing work groups

The user will only see the workgroups of the rules they have permissions for. e.g. user with [redacted] permissions will only see [redacted] workgroups, and would only see [redacted] as a selection when creating a group too

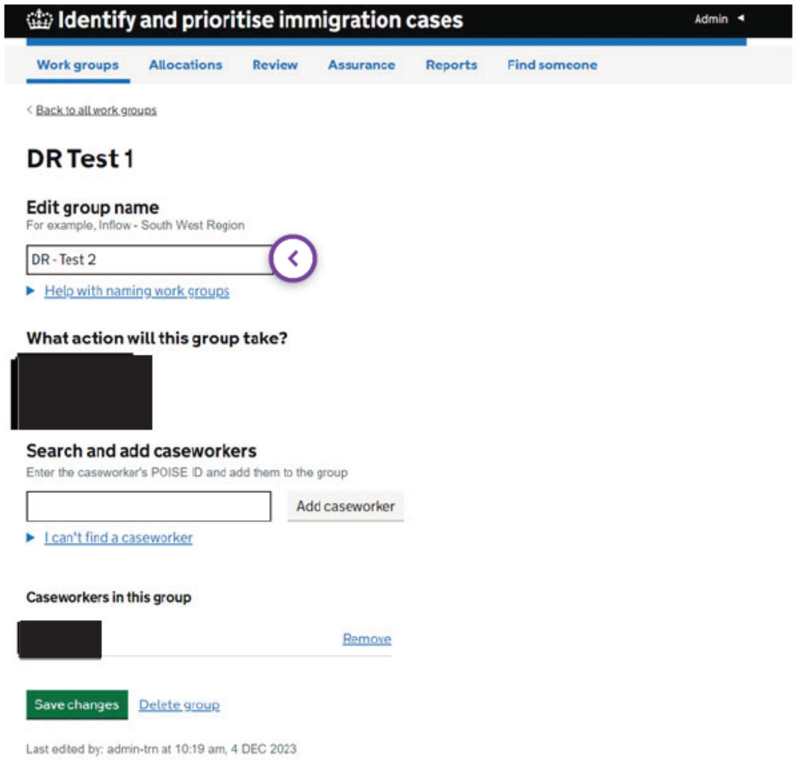
Edit group

Select edit group to amend the work group

CONTINUE

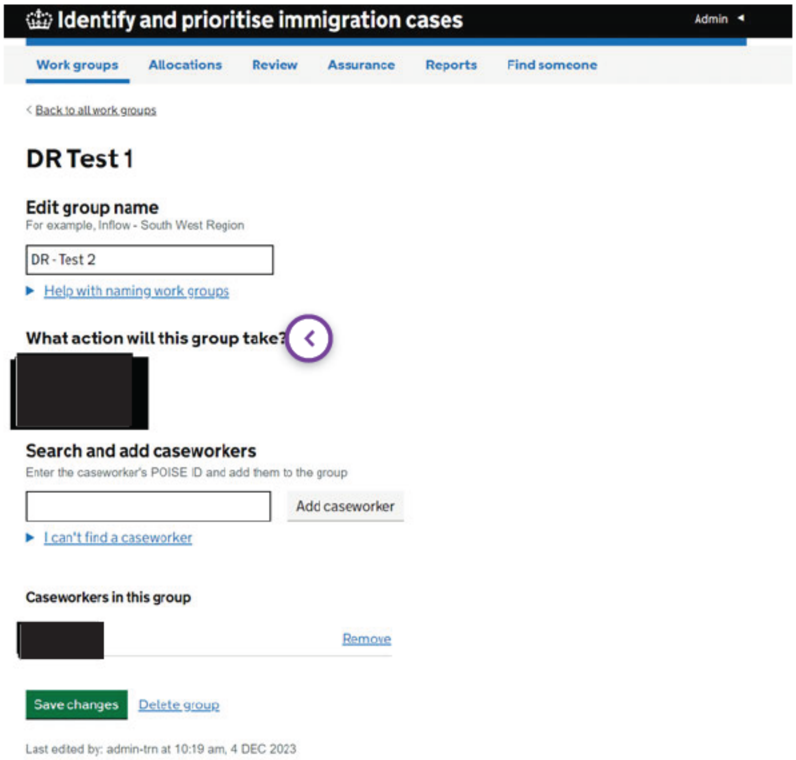


Identify and prioritise immigration cases
Admin
Work groups
Allocations
Review
Assurance
Reports
Find someone
Back to all work groups
DR Test 1
Edit group name
For example, Inflow - South West Region
DR - Test 2
Help with naming work groups
What action will this group take?
[redacted]
Search and add 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
[redacted]
Remove
Save changes
Delete group
Last edited by: admin-trn at 10:19 am, 4 DEC 2023



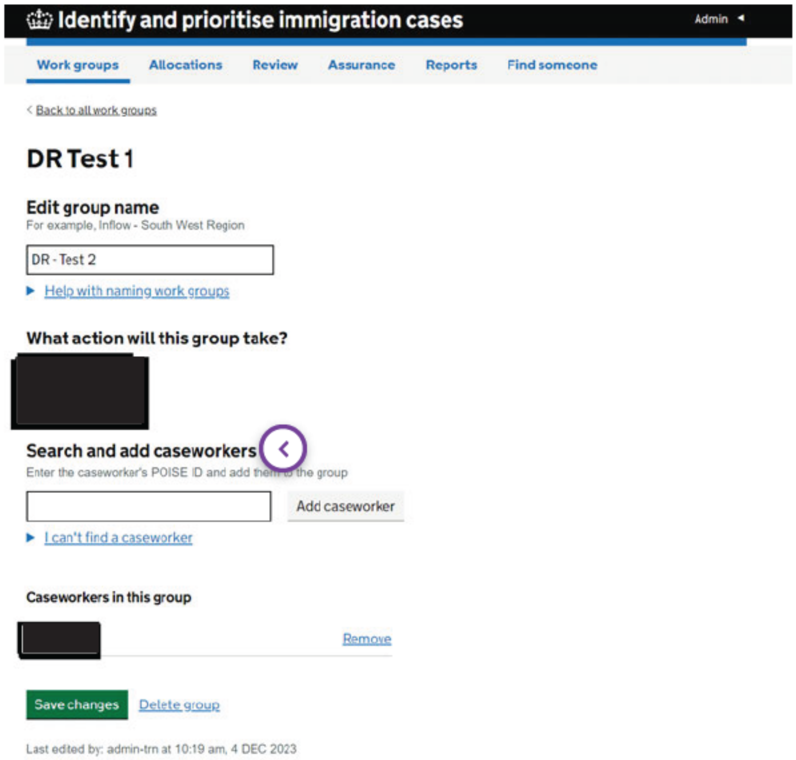
Edit Name

Users can edit the name of the group



Action

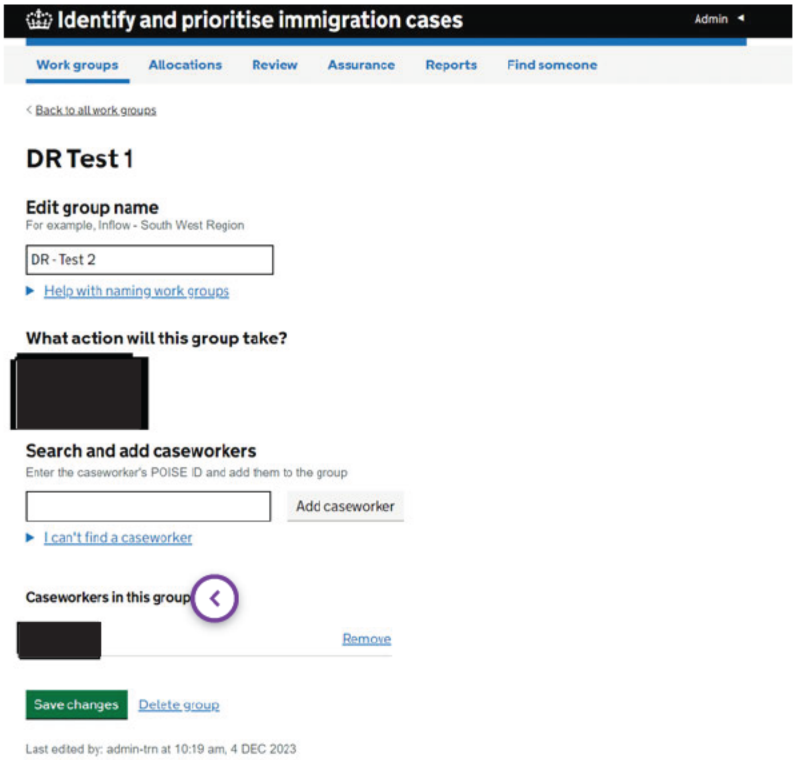
Users can also amend which action the group will take by reselecting a different option



Caseworker

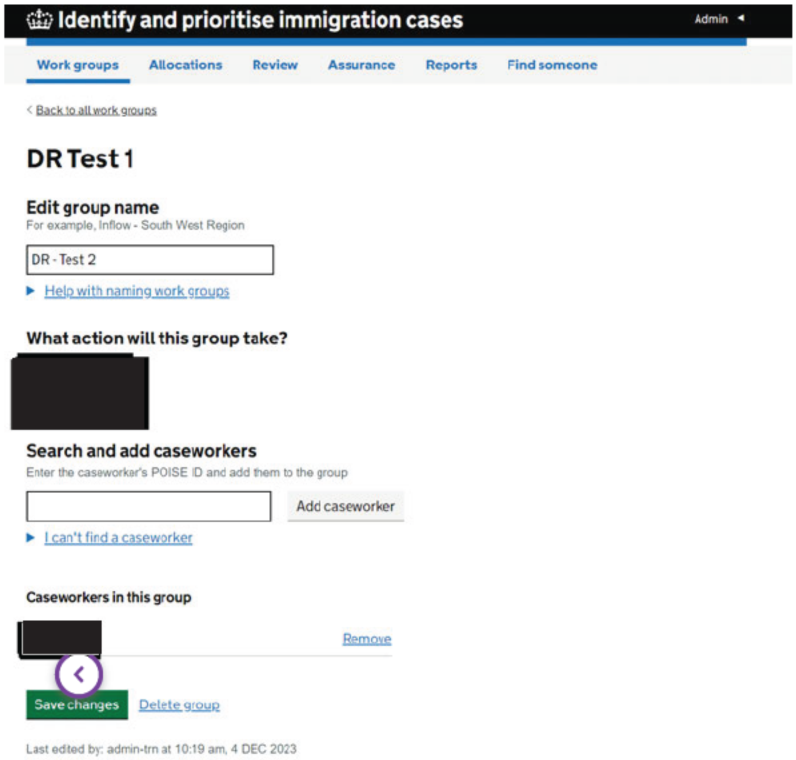
If additional caseworkers are required for this group, this can be done by searching their POISE ID and when selected, click add caseworker.

To get more help with this, select the 'I can't find a caseworker' link



Caseworkers in group

If a caseworker is no longer required in this group, select remove



Save changes

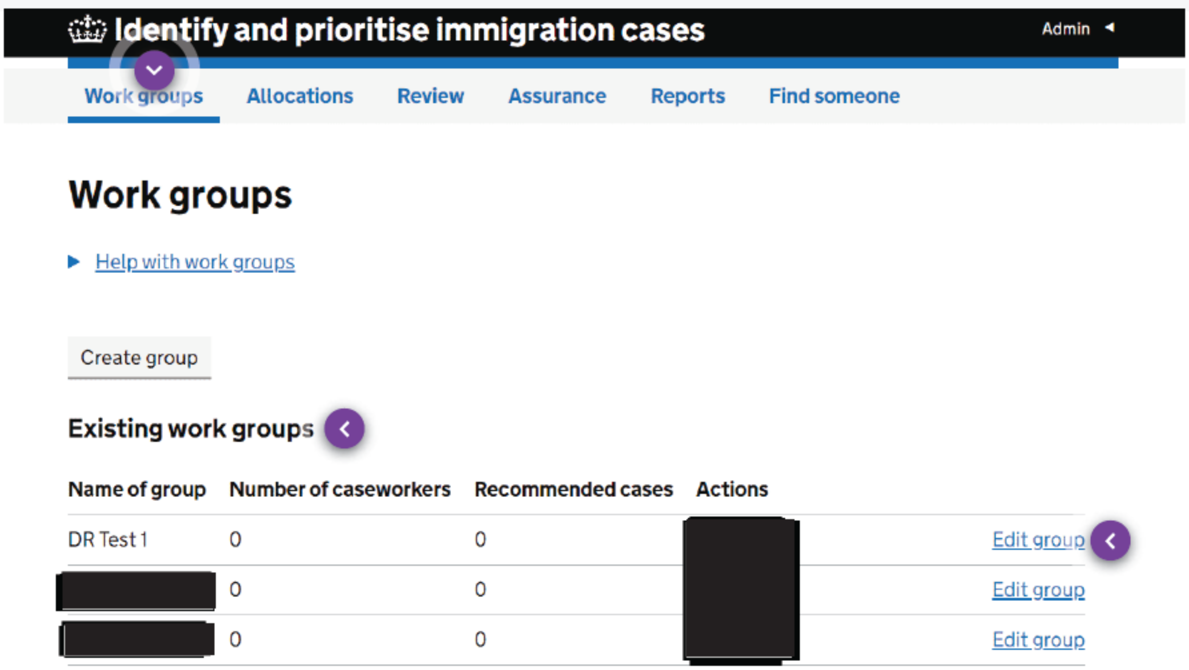
Select save changes to save the amended information entered above

LESSON COMPLETE

Deleting a work group

[redacted]

This section will show users how to delete a work group.



Identify and prioritise immigration cases

Admin

Work groups | Allocations | Review | Assurance | Reports | Find someone

Work groups

Help with work groups

Create group

Existing work groups

Name of group	Number of caseworkers	Recommended cases	Actions
DR Test 1	0	0	[redacted] Edit group
[redacted]	0	0	Edit group
[redacted]	0	0	Edit group

Work groups

Select work groups

Identify and prioritise immigration cases   Admin

Work groups | Allocations | Review | Assurance | Reports | Find someone

Work groups

▶ Help with work groups

Create group

Existing work groups

Name of group	Number of caseworkers	Recommended cases	Actions	
DR Test 1	0	0	[redacted]	Edit group
[redacted]	0	0		Edit group
[redacted]	0	0		Edit group

Existing work groups

The user will only see the workgroups of the rules they have permissions for. e.g. user with [redacted] permissions will only see [redacted] workgroups, and would only see [redacted] as a selection when creating a group too

Edit group

Select edit group to continue with deletion of the group

CONTINUE

Identify and prioritise immigration cases

Admin

Work groups | Allocations | Review | Assurance | Reports | Find someone

< Back to all work groups

DR Test 1

Edit group name

For example, Inflow - South West Region

DR Test1

▶ Help with naming work groups

What action will this group take?

[redacted]

Search and add caseworkers

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

Add caseworker

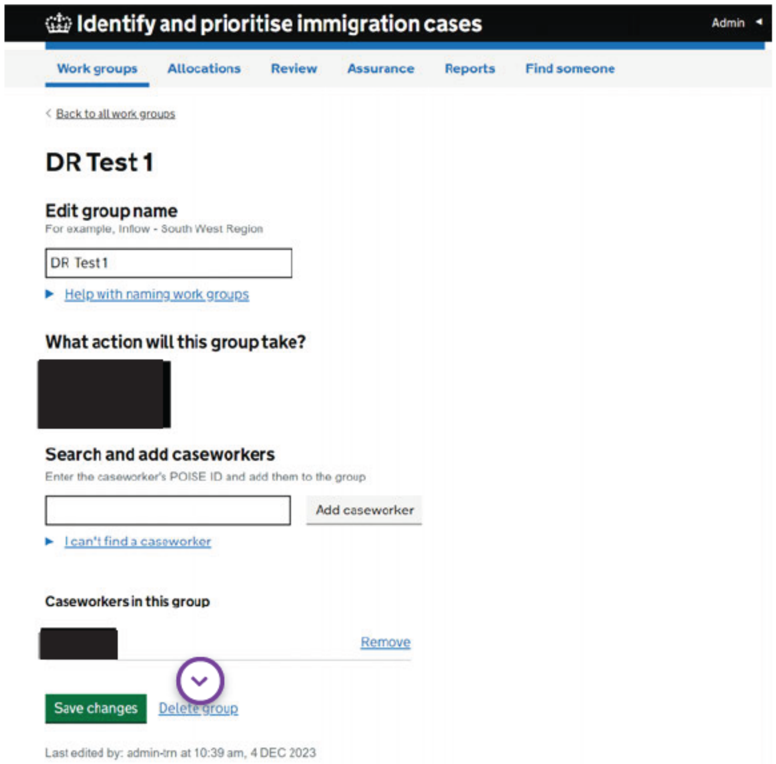
▶ I can't find a caseworker

Caseworkers in this group

[redacted] Remove

Save changes | Delete group

Last edited by: admin-trn at 10:39 am, 4 DEC 2023



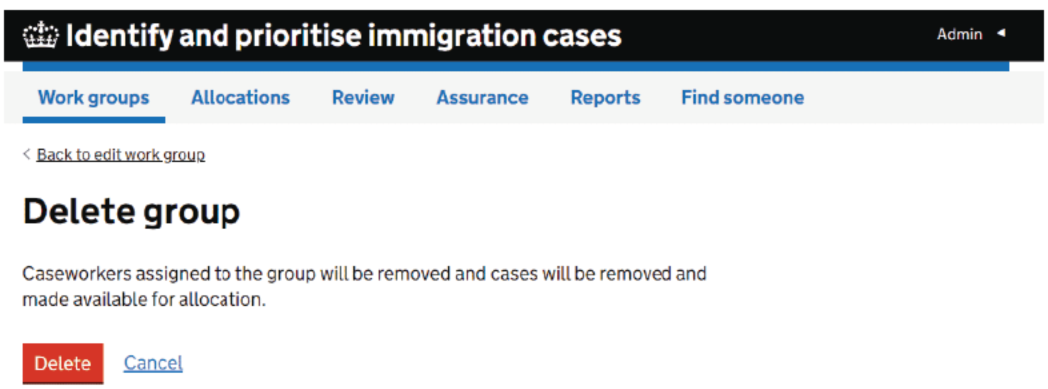
Delete group

Managers can delete the group entirely by clicking on delete group

CONTINUE


Identify and prioritise immigration cases
Log out
Work groups
Allocations
Review
Assurance
Reports
User setup
Find someone
Back to edit work group
Delete group
3 cases are on hold in the group 'DR Test 1'
Deleting this group means caseworkers assigned to the group will be removed and the on hold cases will be removed and made available for allocation.
View cases on hold
Name
Action
CEPR or PID
Reason place on hold
Place on hold by
[redacted]
Delete
Cancel

No cases on hold



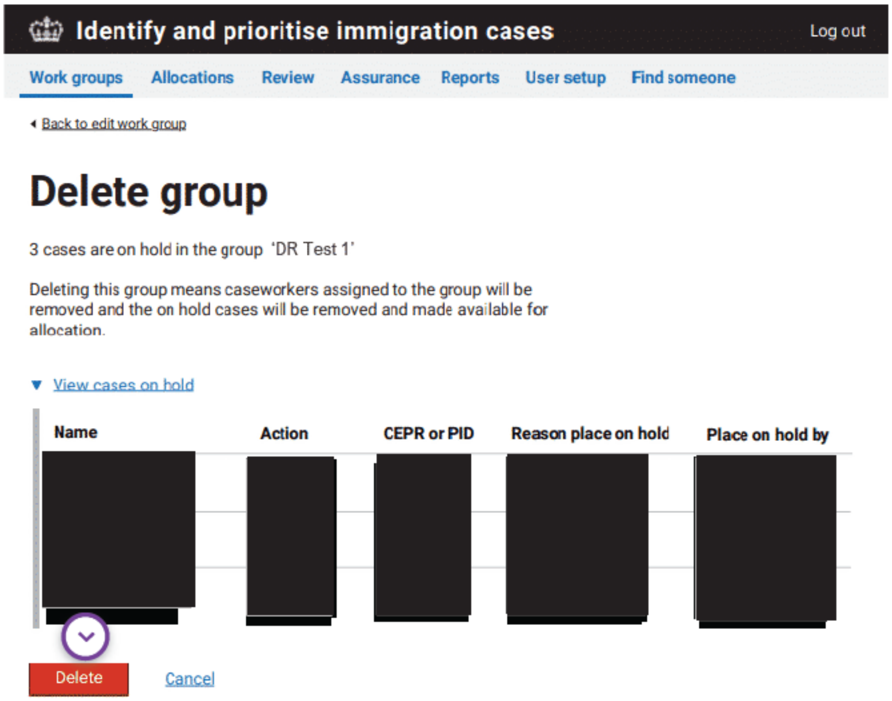
If there are no cases on hold within the work group then this screen will show instead

View case on hold

This will show all the cases currently on hold within this work group.

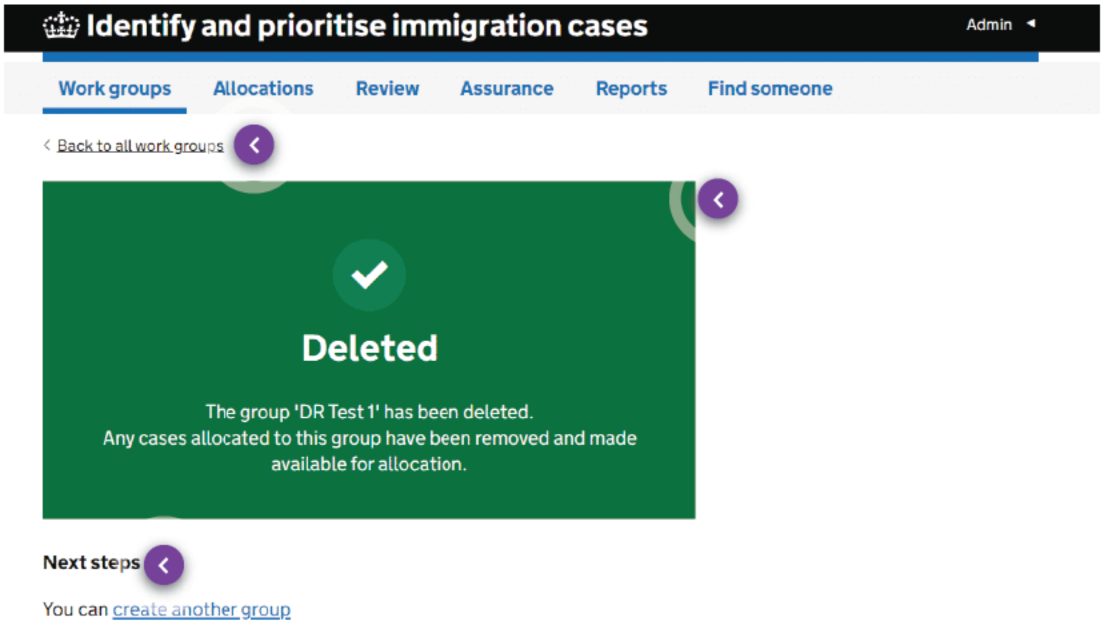
When selecting 'view cases on hold', users will see the list of recommendations on hold. If these recommendations need to be actioned, please do this prior to deletion. To do this, select the name and accept or reject the recommendation.

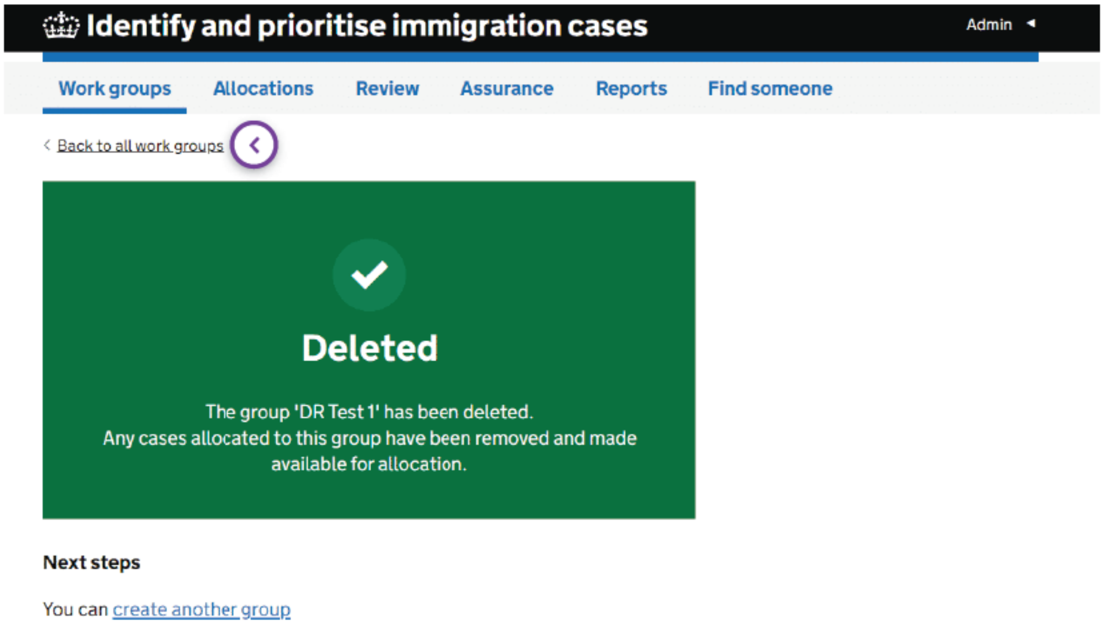
If they do not need to be actioned, select delete and these people will be made available for allocation again, where apprioprate



Delete

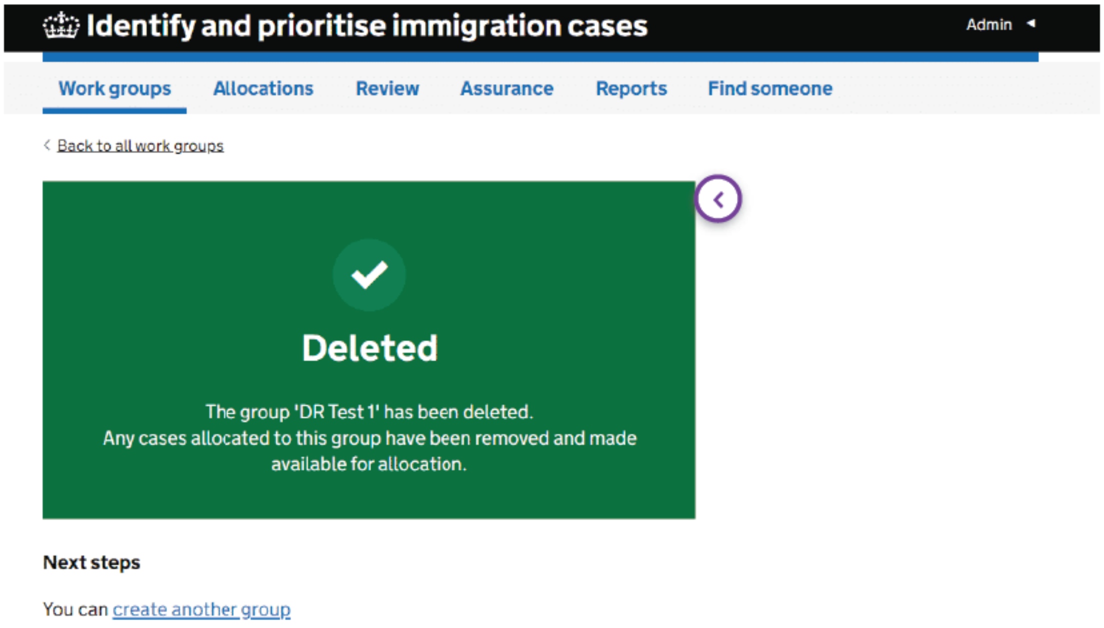
Select delete or alternatively, select cancel to cancel the deletion


Identify and prioritise immigration cases
Admin
Work groups
Allocations
Review
Assurance
Reports
Find someone
Back to all work groups
Deleted
The group 'DR Test 1' has been deleted.
Any cases allocated to this group have been removed and made available for allocation.
Next steps
You can create another group



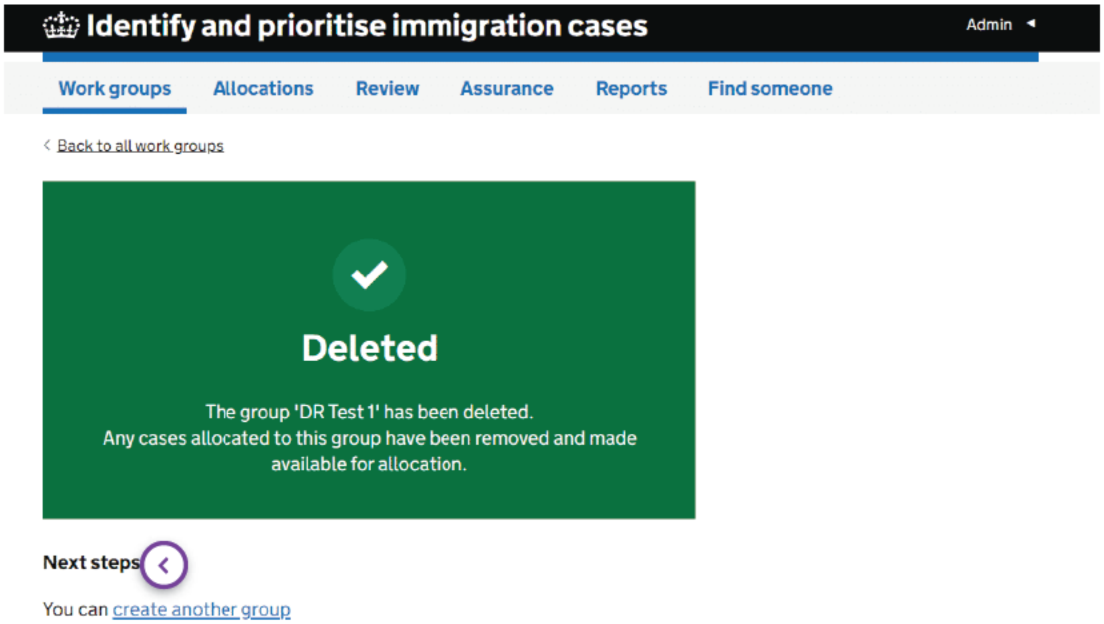
Back to all work groups

Users can select 'back to all work groups'



Deleted

Users will now see a deleted confirmation in a green box as displayed



Next steps

Users can also create a new group from this point by clicking on 'create another group'

LESSON COMPLETE

Allocations

[redacted]

This section shows how users with manager access only, can allocate recommendations to work groups by using filters.

Allocations

Select the allocations button to get started

Type of action

Select the type of action required. This will be [redacted]

[redacted]

Continue

Select continue


Identify and prioritise immigration cases
Allocate cases

Change action

Change action is based on permissions set, to change this, select 'change action'

Status

Select 'new cases' or 'existing cases'. Both can be selected

Please note: New cases are new recommendations to the rule within 14 days. Existing cases are everything that isn't new

[redacted]

[redacted]

More than one option can be selected on the [redacted]

[redacted]

Users can prioritise by either [redacted]

When one option is selected, users will have the option of [redacted]

In setting this filter, this will change the ordering of the results to [redacted]

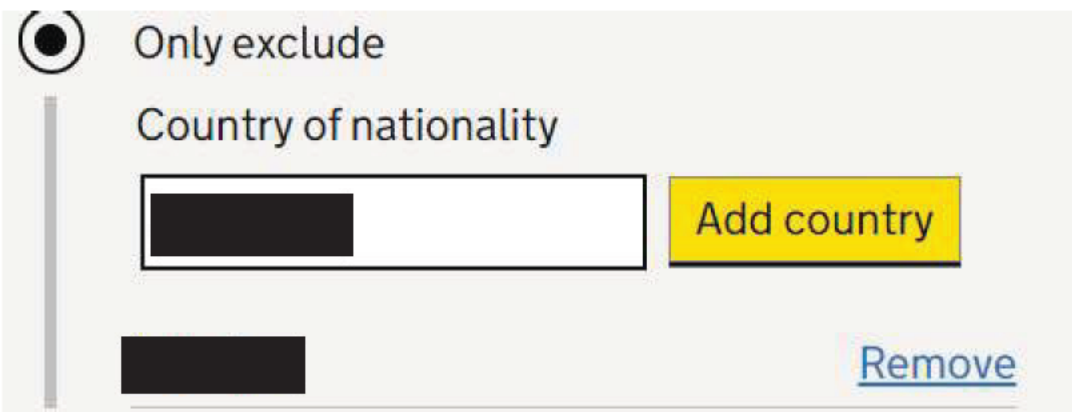
Age

Users can select an age filter by selecting 'all' to include all ages available in the data / business rule.

Or users can select 'only include' to only include start - end age ranges

Please note - [redacted]

Nationality



Users can include a nationality filter by selecting:

'All' which will include all nationalities.
'Only include'
OR
'Only exclude' specific nationalities.

Users will need to select the country of nationality by typing in the box and then selecting 'add country'. Multiple options can be selected.

Example of adding a country of nationality

[redacted]

[redacted]

Users can select 'all' or 'only exclude' linked individuals. When selecting 'only exclude', a dropdown menu will be displayed

Example showing what the dropdown menu includes

Please note:

[redacted]

[redacted]

Users will select either:

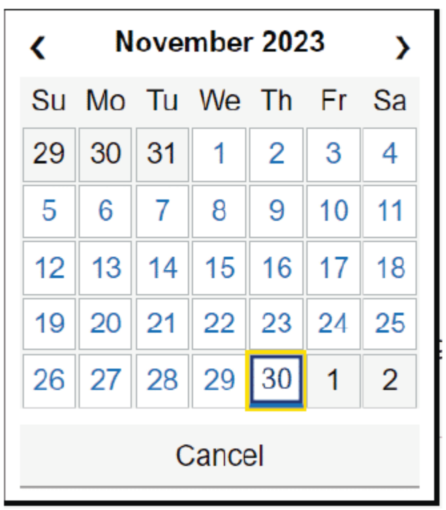
'All'
'Only include'
'Only exclude'
OR 'Exclude all'

If selecting only include or exclude, a dropdown menu will be listed.

The list shows all the possible vulnerabilities within the data that can be included or excluded in the filter

An example from the dropdown menu can be shown here

Reporting date range



Users can set a specific reporting date range. Alternatively, users can select 'only search for cases with open restrictions but no reporting dates'. There is a calendar icon which can be used for selecting any dates

Please note - this is optional and not inputting dates will give all persons with any future reporting dates

Reporting offender management

[redacted]

Select 'all', 'only include' or 'only exclude' reporting offender management region. When selecting only include or exclude, a dropdown menu will be displayed with a list of ROM regions

Immigration compliance enforcement

[redacted]

Select 'all', 'only include' or 'only exclude' Immigration compliance enforcement (ICE) region. When selecting only include or exclude, a dropdown menu will be displayed with a list of ICE regions

Filters

Users can select:

Apply filters

Hide filters

Reset filters

Work group

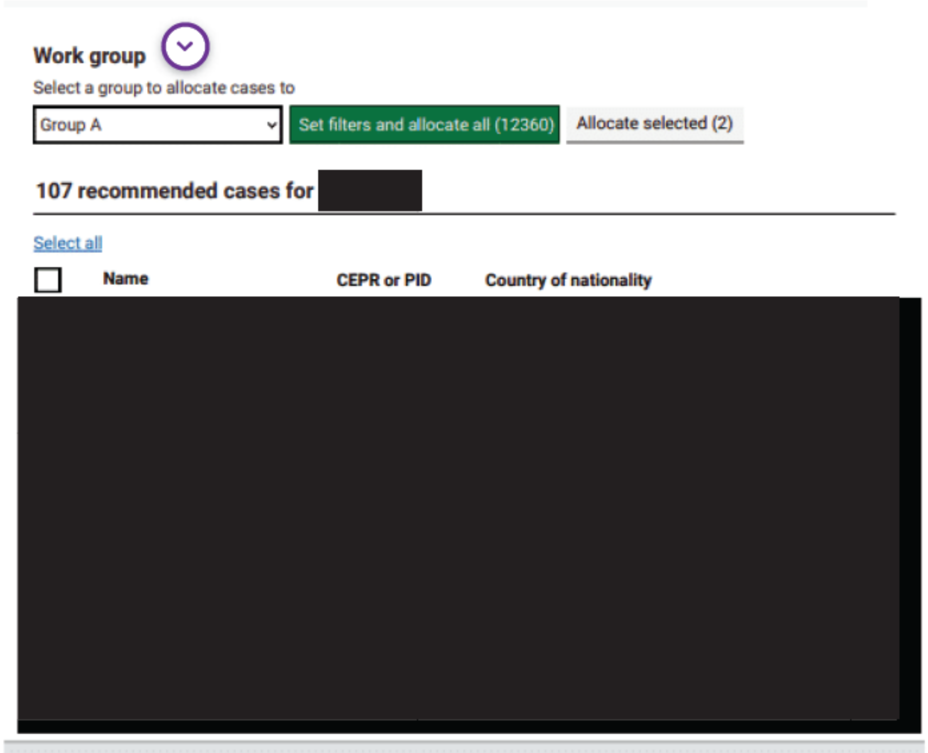
Select a group to allocate cases to

Group A | Set filters and allocate all (12360) | Allocate selected (2)

107 recommended cases for [redacted]

Select all

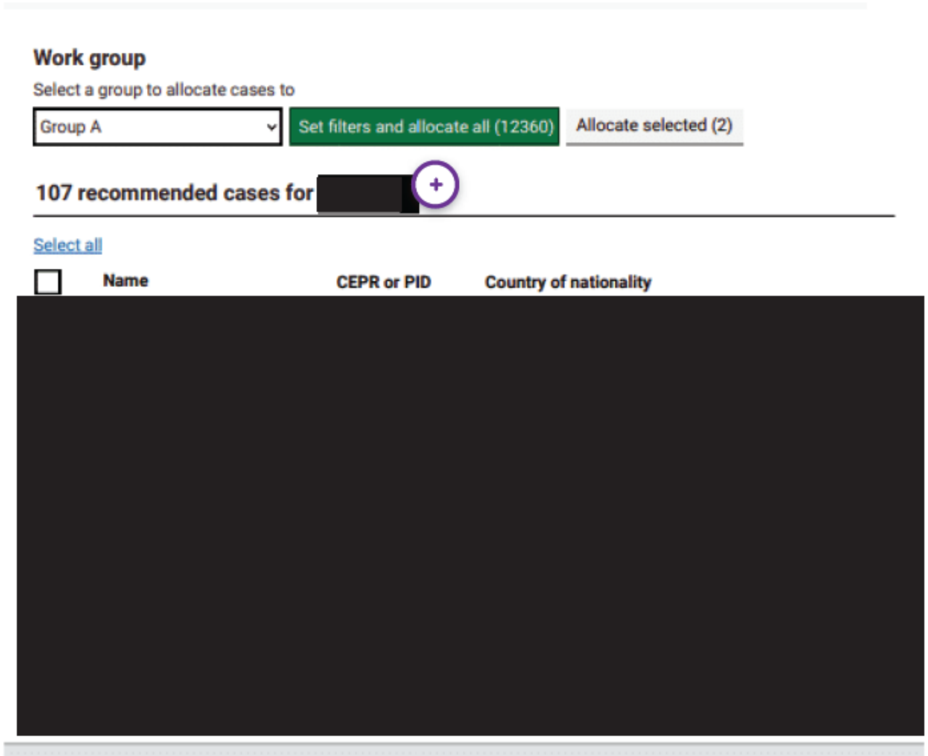
☐	Name	CEPR or PID	Country of nationality
[redacted]			



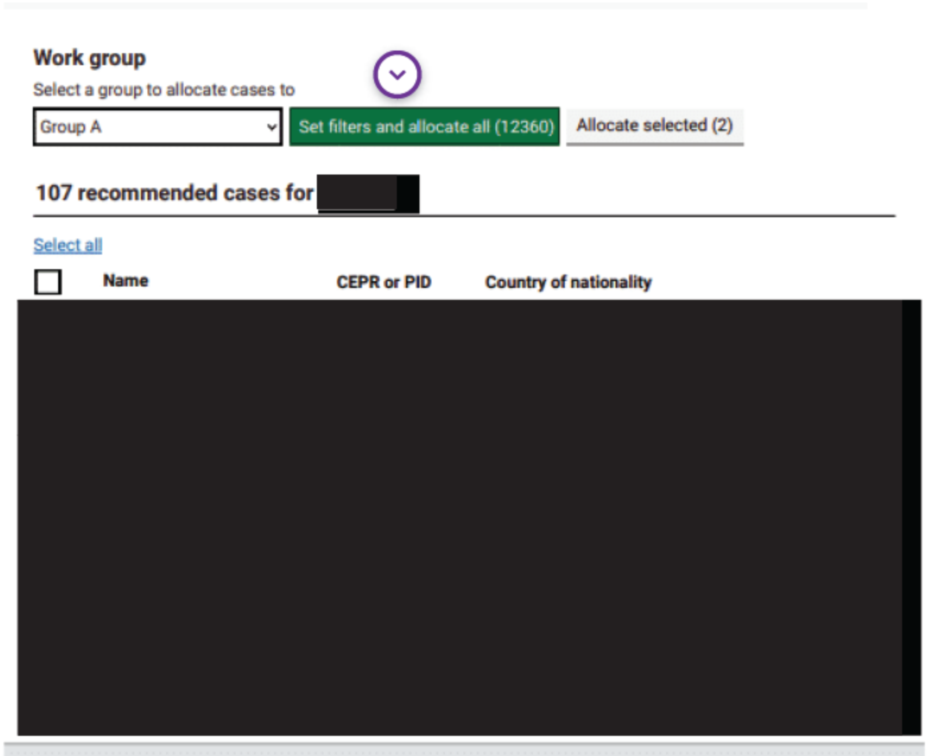
Work group

When users have selected 'apply filters', this screen will be displayed. Select a group to allocate cases to. For this example, 'Group A' is selected.

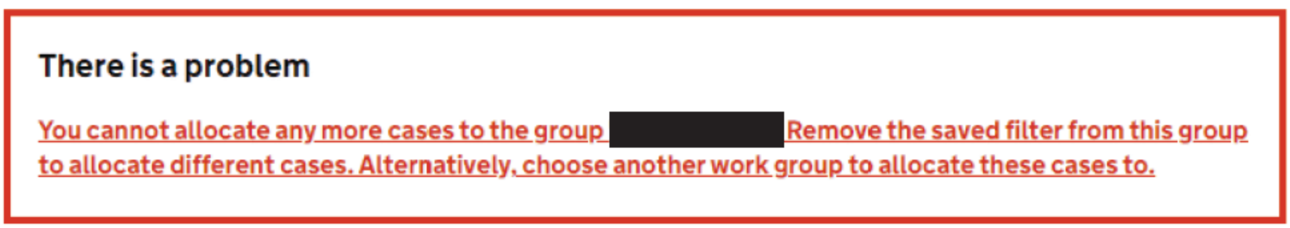
In the drop down, you will see the appropriate workgroups for the action you are looking to allocate. For example, if you are allocating [redacted] recommendations, you will only see workgroups that have been created for [redacted]



This will show the total number of recommendations.



Allocate all



Users can select 'set filter and allocate all'. If this is selected, it will allocate everything to the work group

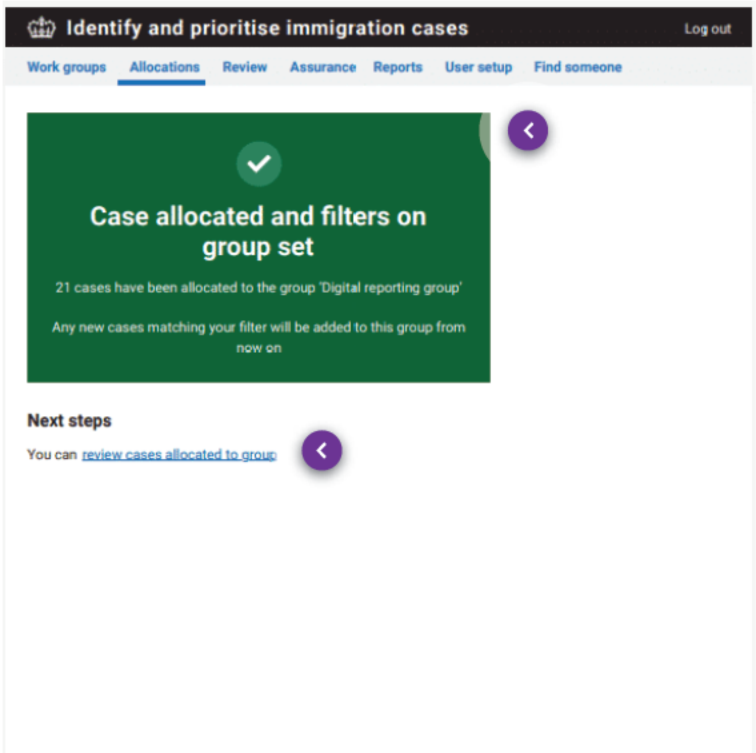
Please note - if you allocate all, cases will be continued to be added and removed to this workgroup based on your filters, until a user changes them.

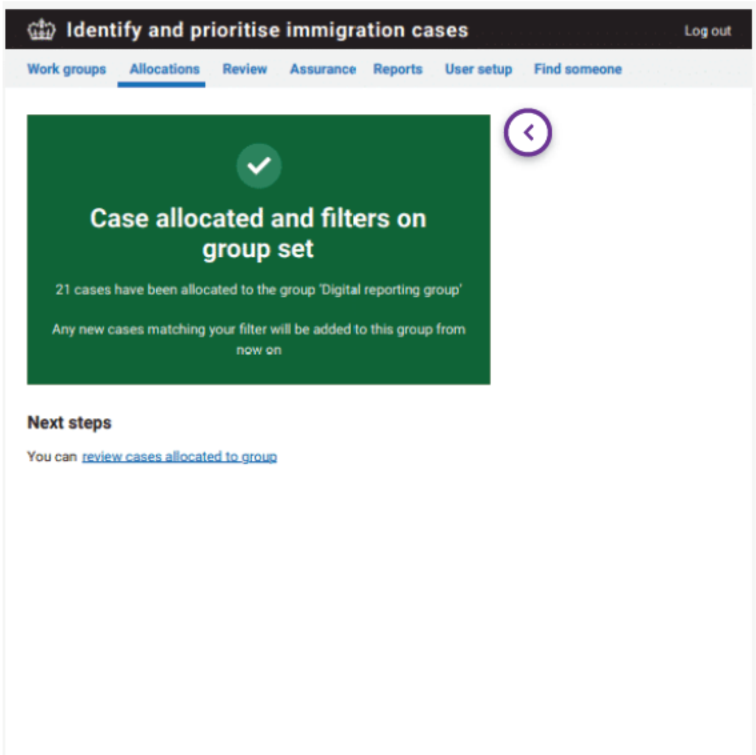
Users can not allocate cases to a group that already has "Set filters and allocate all" allocated to it (see image for example)

Allocate selected

Select individual recommendations by ticking the boxes next to the name, here you can see 2 recommendations have been selected. This allows users to put selected individuals into a specific workgroup. Then select 'allocate selected'

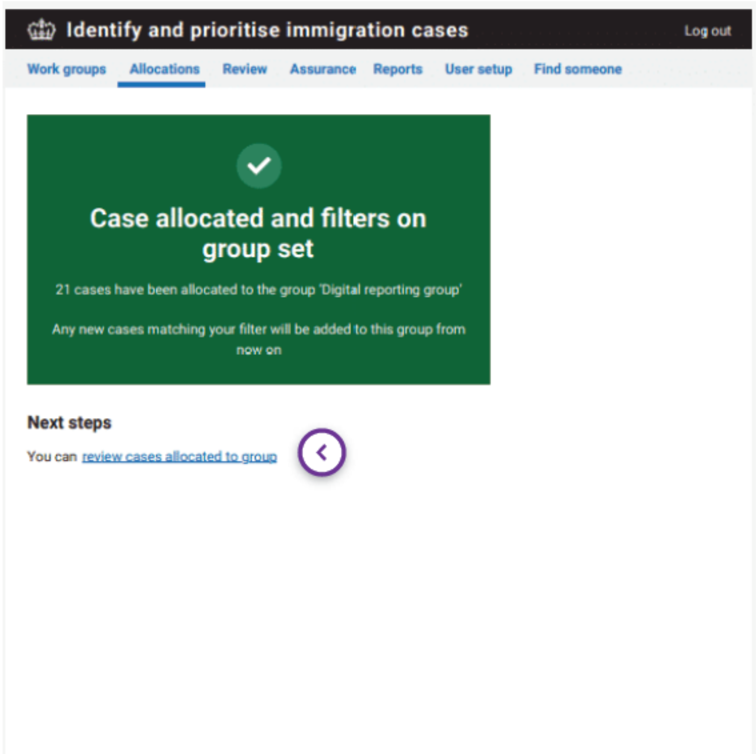
Users can apply multiple 'Allocate selected' selections to a workgroup


Identify and prioritise immigration cases
Log out
Work groups
Allocations
Review
Assurance
Reports
User setup
Find someone
Case allocated and filters on group set
21 cases have been allocated to the group 'Digital reporting group'
Any new cases matching your filter will be added to this group from now on
Next steps
You can review cases allocated to group



Filters set

Users will now see the green box explaining that the cases have been allocated and filters on group have been set. It also explains that any new cases matching the filter just applied, will be added to the group from now on



Next steps

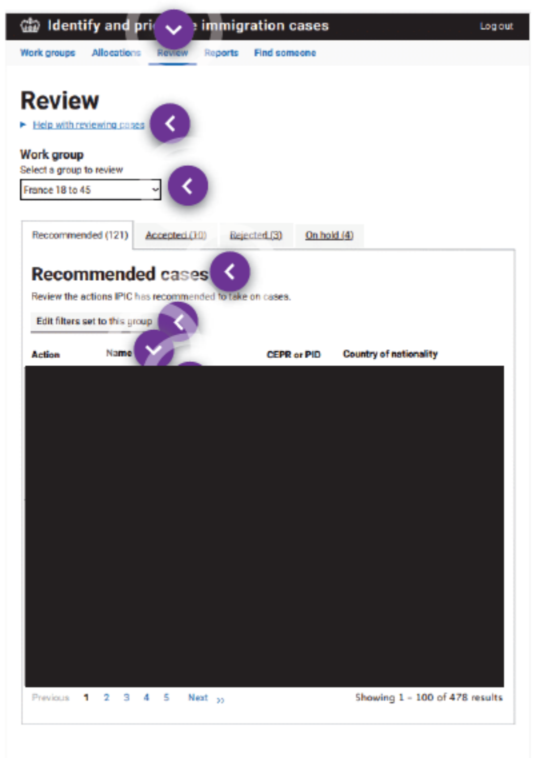
Users can now select 'review cases allocated to group'

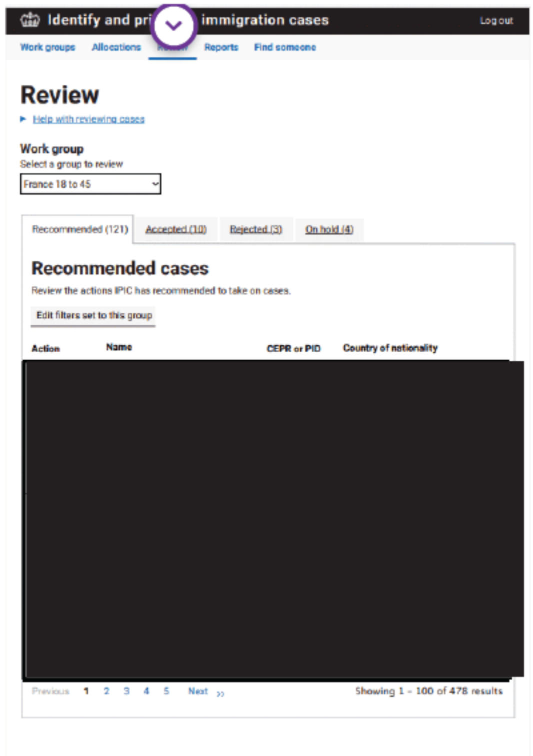
LESSON COMPLETE

Review

[redacted]

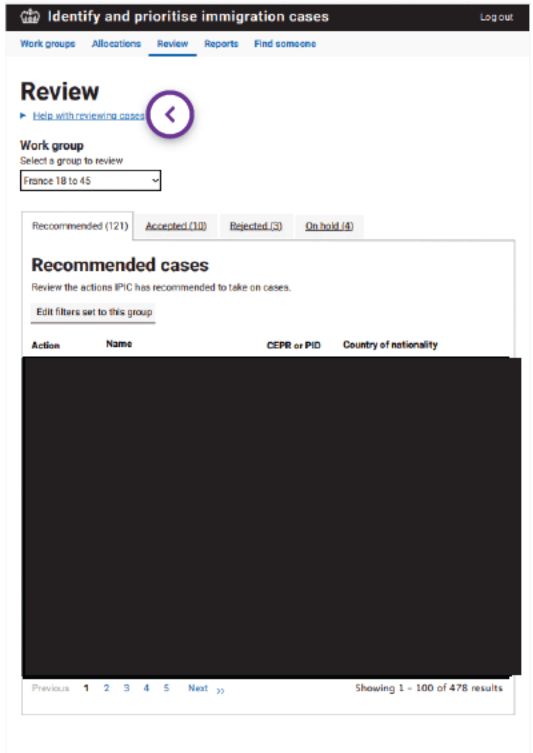
This section demonstrates how to review recommendations within IPIC.





Review

Select the 'review' button to get started



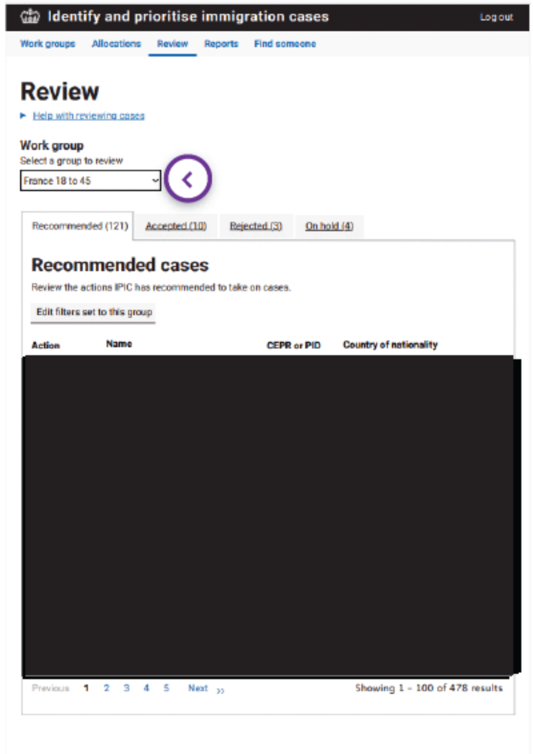
Help

▼ Help with reviewing cases

> Select a work group or an individual caseworker to review.
>
> The recommended tab will allow you to review the prioritised actions that IPIC has recommended to take on cases.
>
> The accepted, rejected and on hold tabs will allow you to review the actions that the caseworkers have processed, including a reason if they have rejected or put a case on hold.

If further support is needed with reviewing cases, users can select the 'help with reviewing cases' button.

Example of what this help looks like

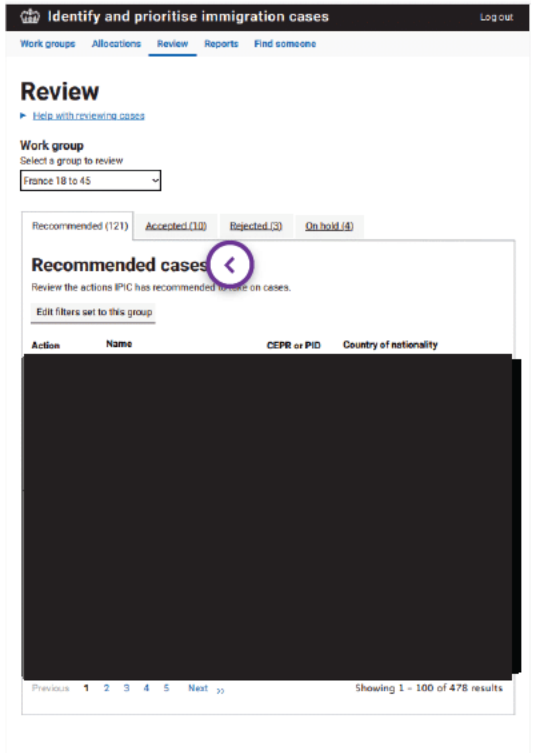


Work group

Select a work group from the dropdown selection. A manager will only see work groups for the rules they have permissions for. E.g. if they only have [redacted] permissions, [redacted] work groups will not be seen.

When a work group is selected to review, users will see 4 tabs.

Recommended
Accepted
Rejected
On hold



Recommended cases

Users will see a list of recommendations here.

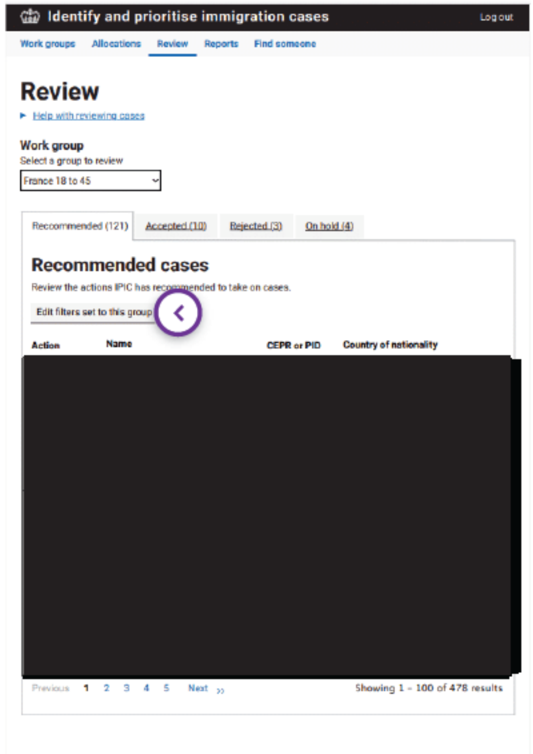
Action - this displays as either [redacted], depending on what is selected by the user at the start

Name - the name of the person

CEPR or PID - if the individual have one of these references, it will show here

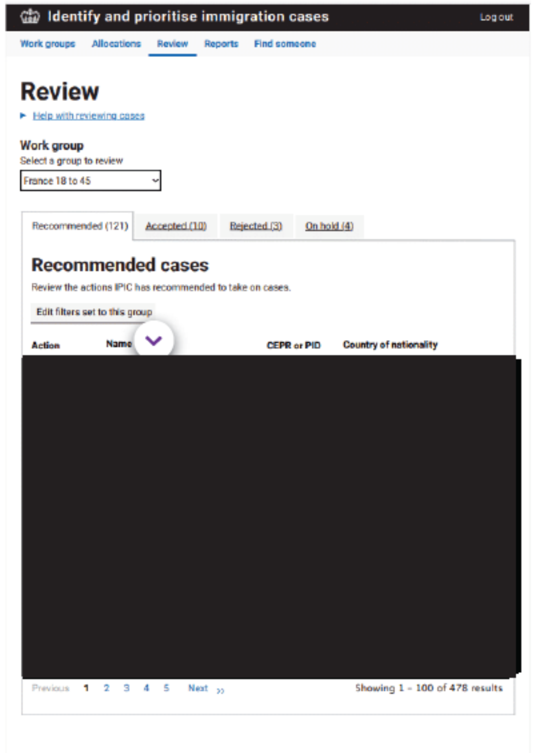
Country of nationality - Nationality of the person

[redacted]



Edit filters

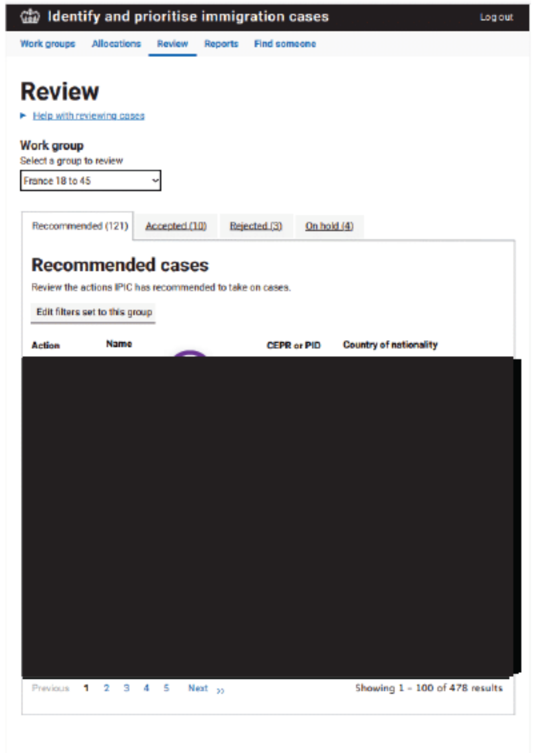
By selecting 'edit filters set to this group', it will allow users to make changes to the filters again



Information on priority

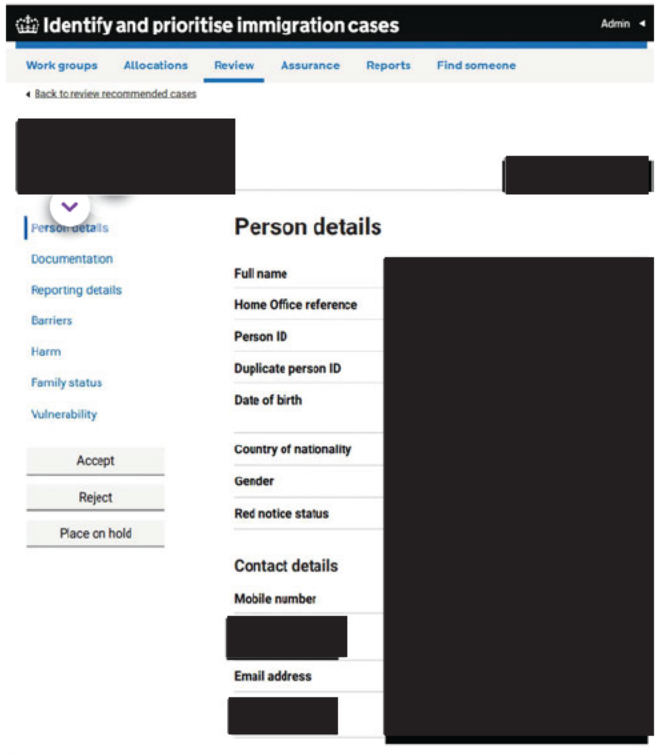
The list is priority order as selected in the allocations filters. [redacted] will be at the top of the list.

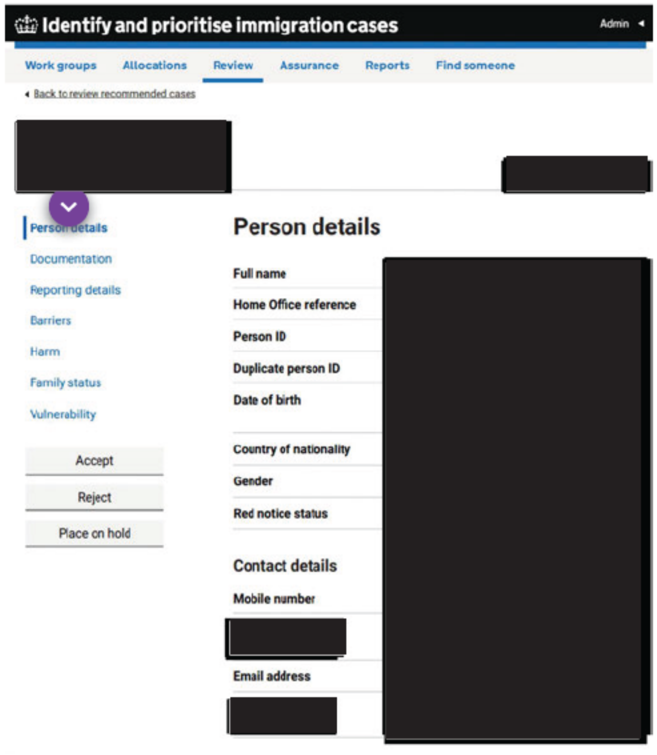
For [redacted] the person who [redacted] at the top, the person who [redacted] will be last.



Select recommendation

Select the linked name of the recommendation that the user needs to review


Identify and prioritise immigration cases
Admin
Work groups
Allocations
Review
Assurance
Reports
Find someone
Back to review recommended cases
[redacted]
[redacted]
Person details
Documentaton
Reporting details
Barriers
Harm
Family status
Vulnerability
Accept
Reject
Place on hold
Person details
Full name
Home Office reference
Person ID
Duplicate person ID
Date of birth
Country of nationality
Gender
Red notice status
[redacted]
Contact details
Mobile number
[redacted]
Email address
[redacted]

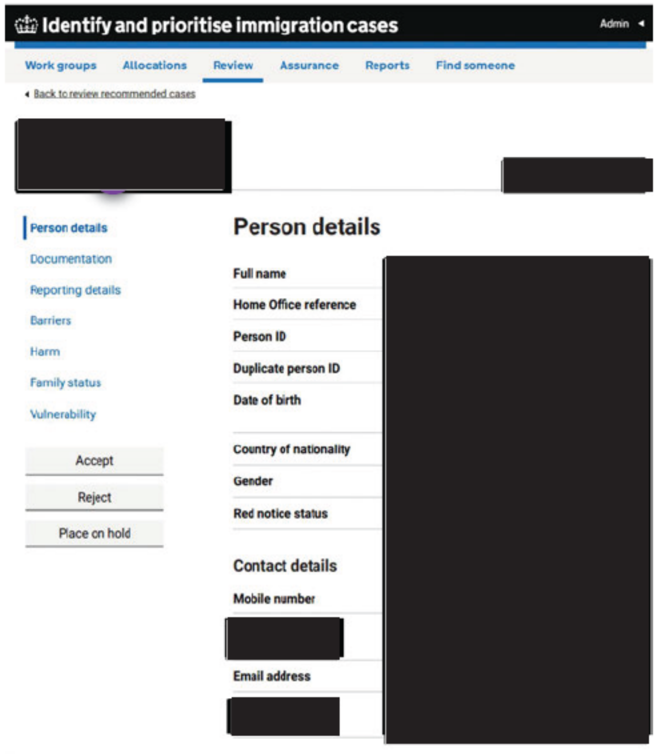


Information

On the tabs below, users will be presented with the following information:

Person details
Documentation
Reporting details
Barriers
Harm
Family status
Vulnerability

Each section can be selected and further information will be displayed.



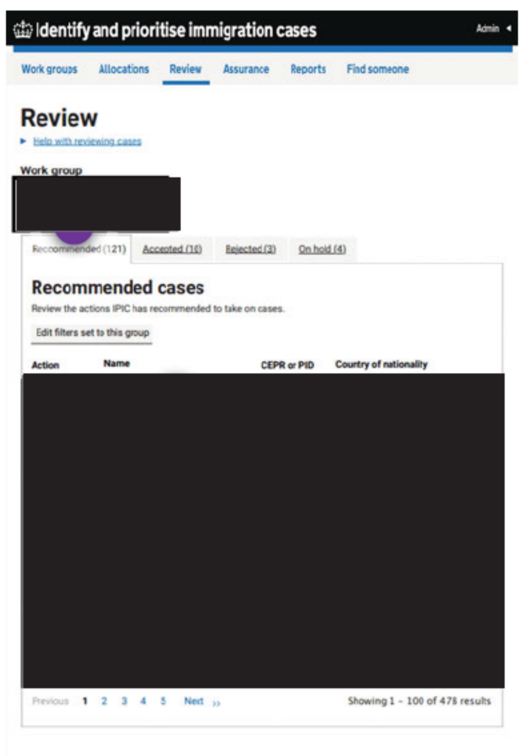
Action

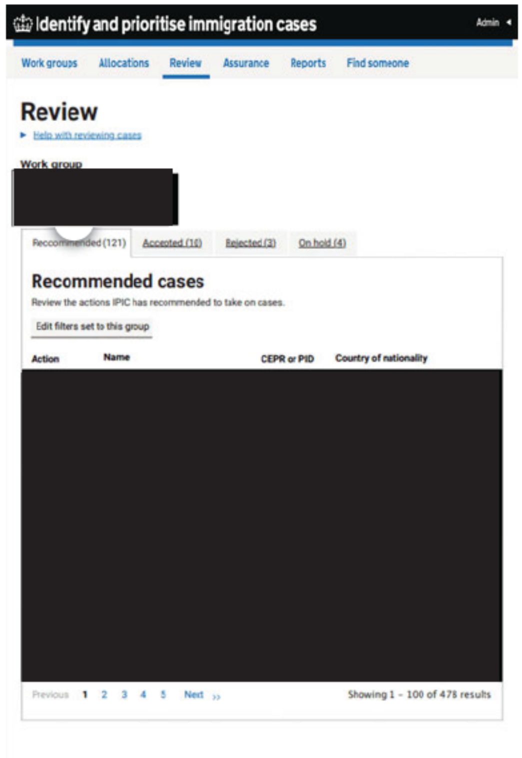
The action will be displayed here. It will either be [redacted] or [redacted]

Accept Person

[redacted]

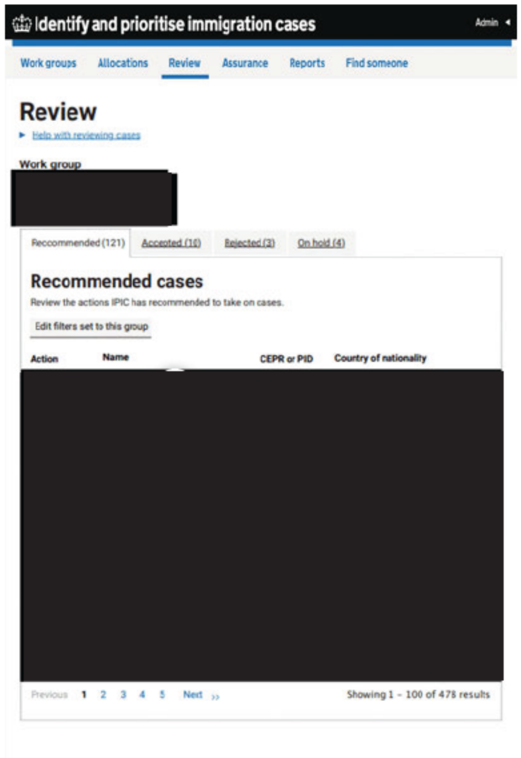
This section demonstrates how to accept a recommendation within IPIC.





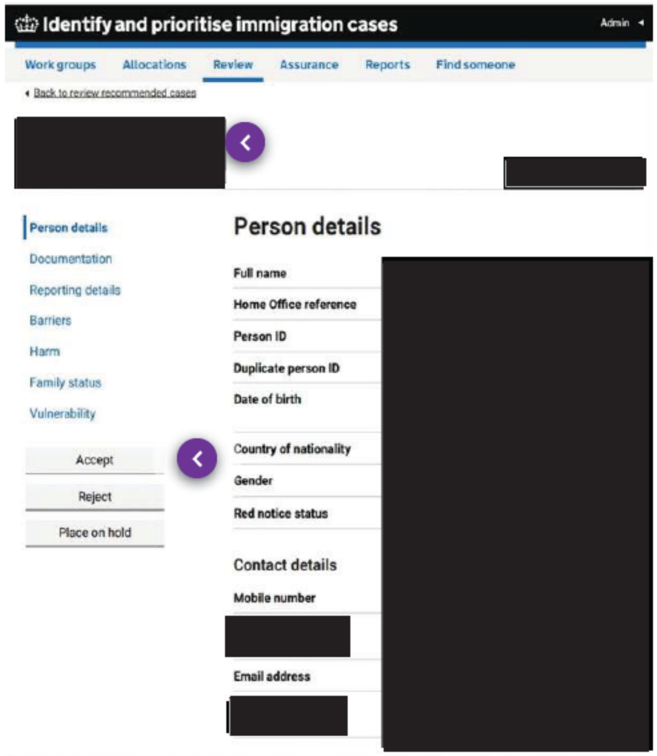
Recommended

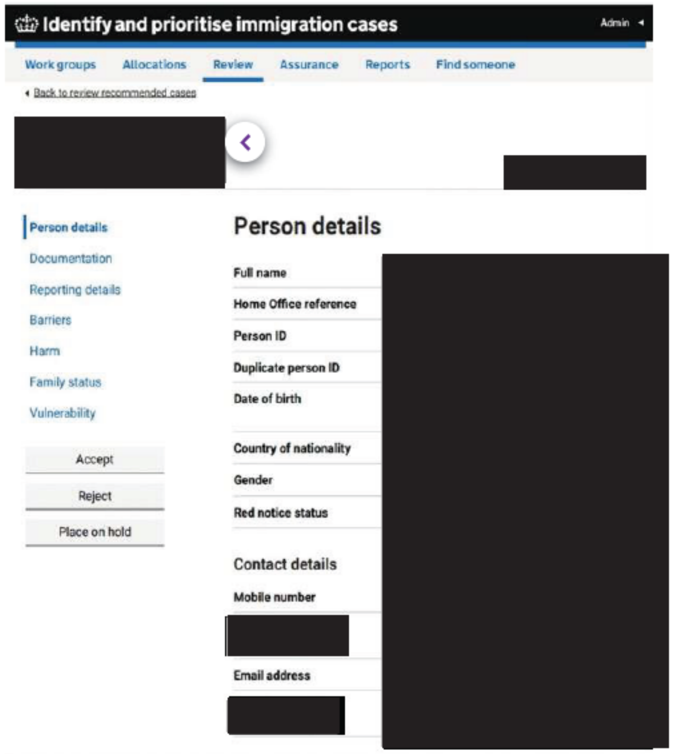
Users will see the list of all recommendations here



Name

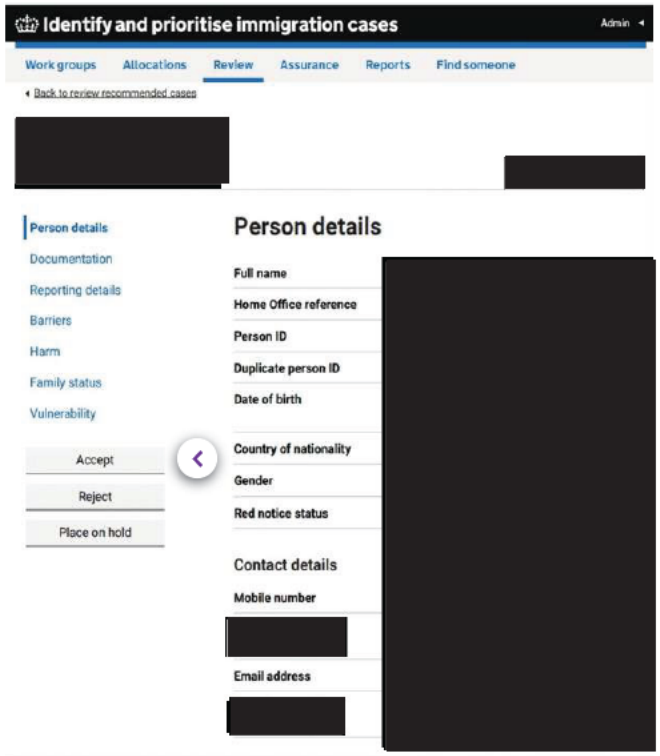
Select on the name of the recommendation wish to be worked


Identify and prioritise immigration cases
Admin
Work groups
Allocations
Review
Assurance
Reports
Find someone
Back to review recommended cases
[redacted]
[redacted]
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 ID
Date of birth
Country of nationality
Gender
Red notice status
Contact details
Mobile number
[redacted]
Email address
[redacted]
[redacted]



Person details

The persons details will be displayed here. Users will need to review this information on immigration systems before accepting or rejecting the recommendation.



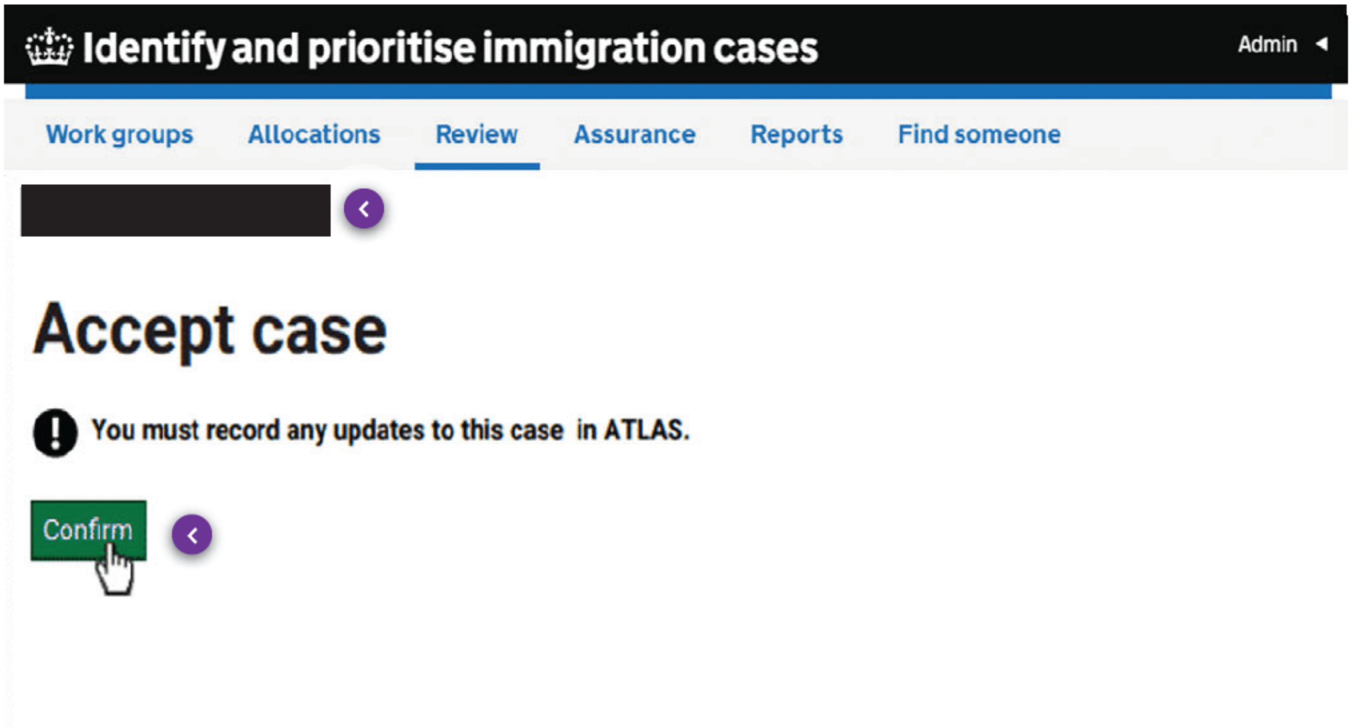
Accept

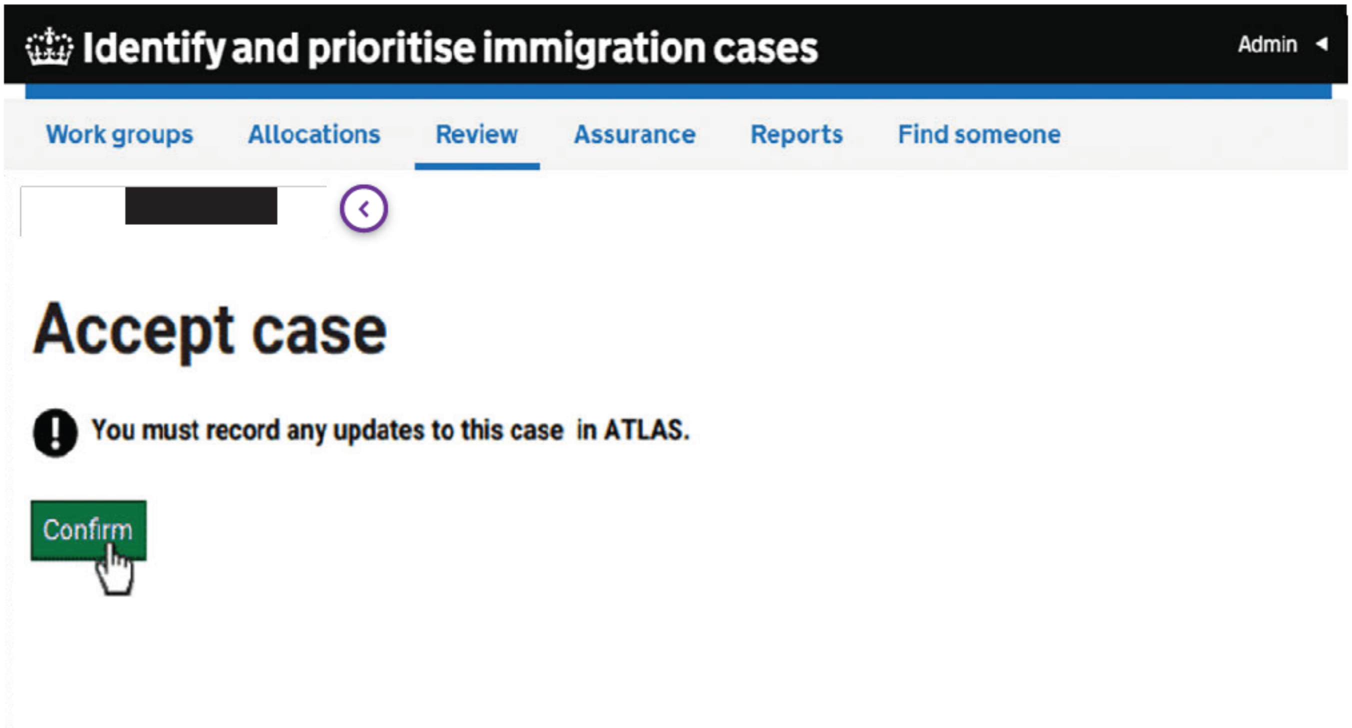
If the user agrees that IPIC has correctly recommended the recommendation, select accept

[redacted]

Once accepted in IPIC, users will need to complete the process to set the person up on Digital Reporting, this will not be done automatically by accepting the recommendations in IPIC.

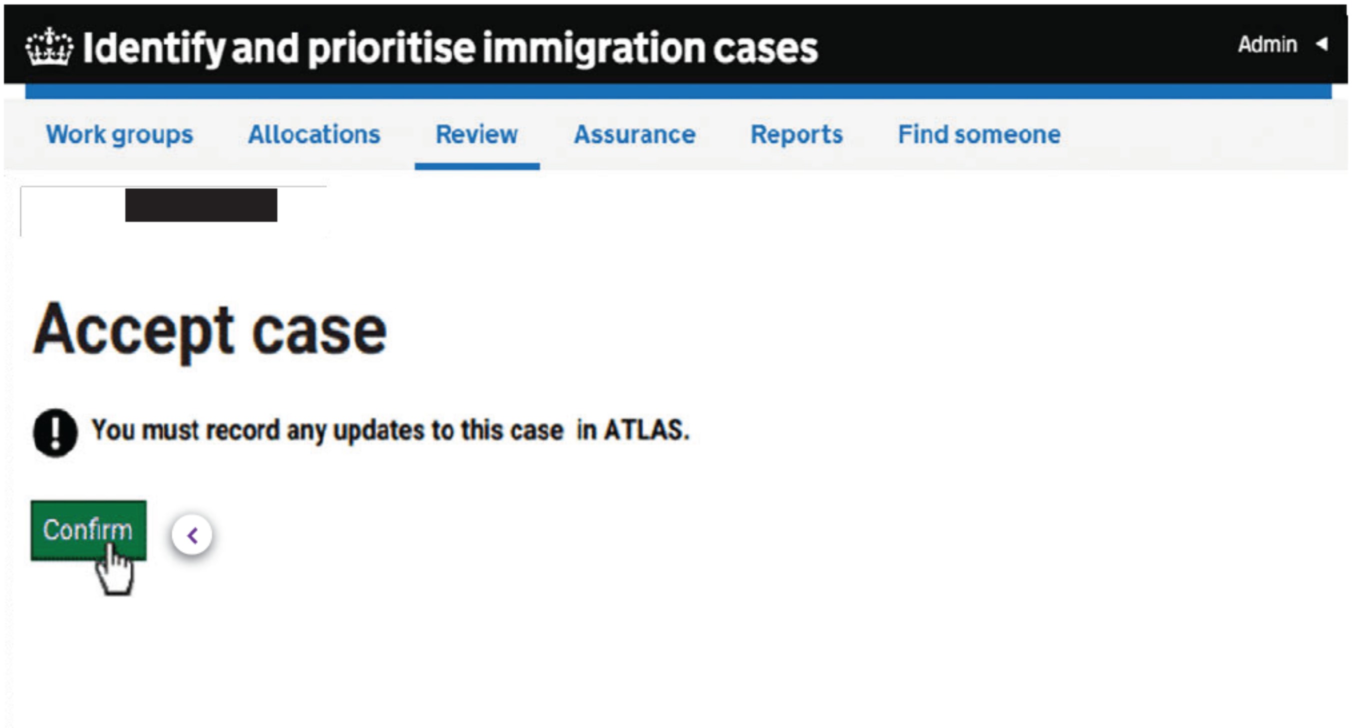
Users must also complete the process on Atlas


Identify and prioritise immigration cases
Admin
Work groups
Allocations
Review
Assurance
Reports
Find someone
[redacted]
Accept case
You must record any updates to this case in ATLAS.
Confirm



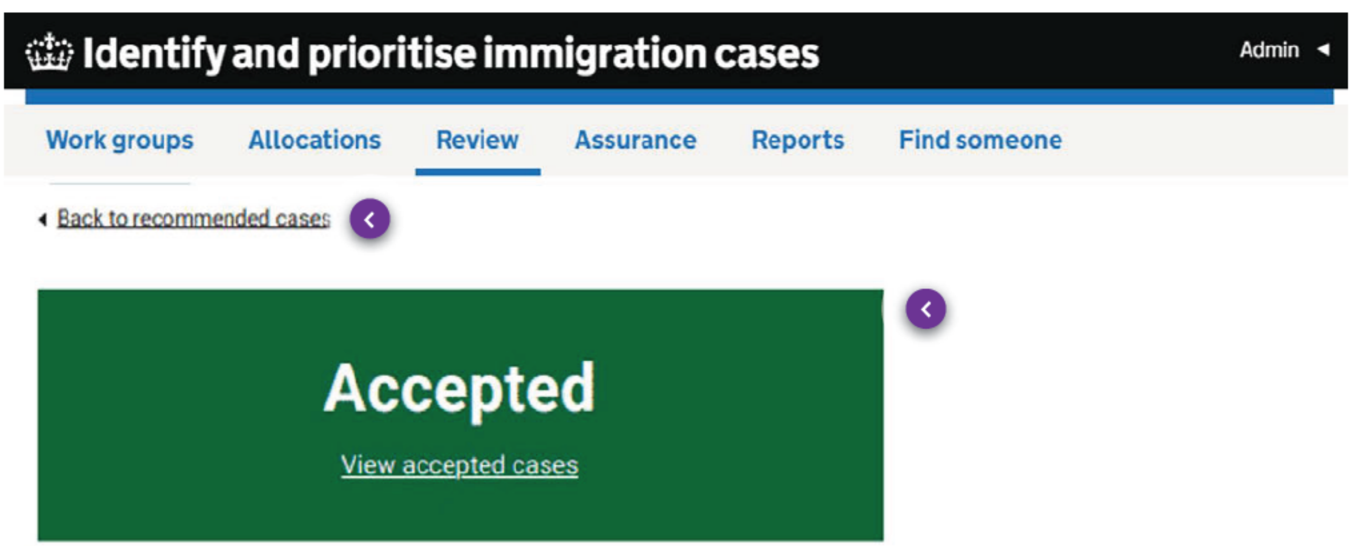
Back

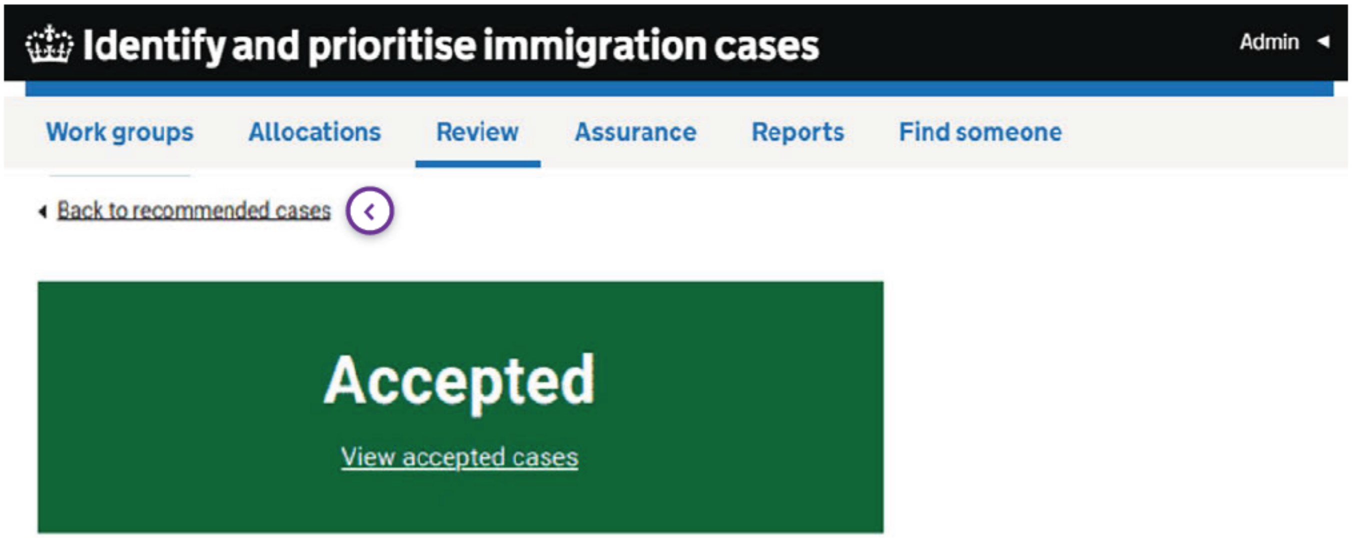
Users can select 'back to [redacted] case' to go back to the previous screen



Confirm

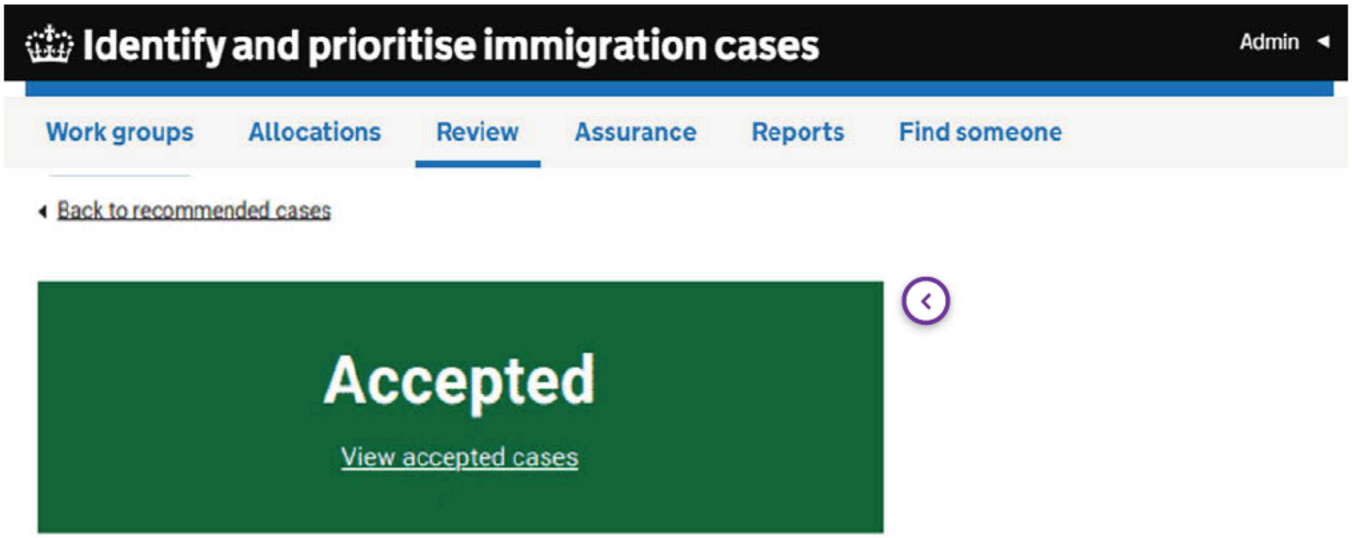
Users will need to record any updates to this case in ATLAS before selecting confirm





Back

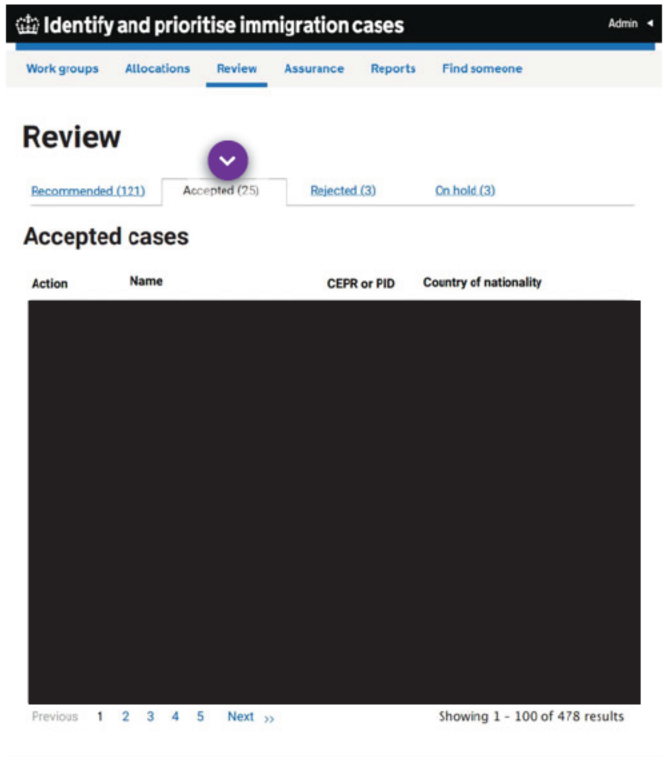
If users would like to go back to view all recommended cases, select the 'back to recommended cases' button

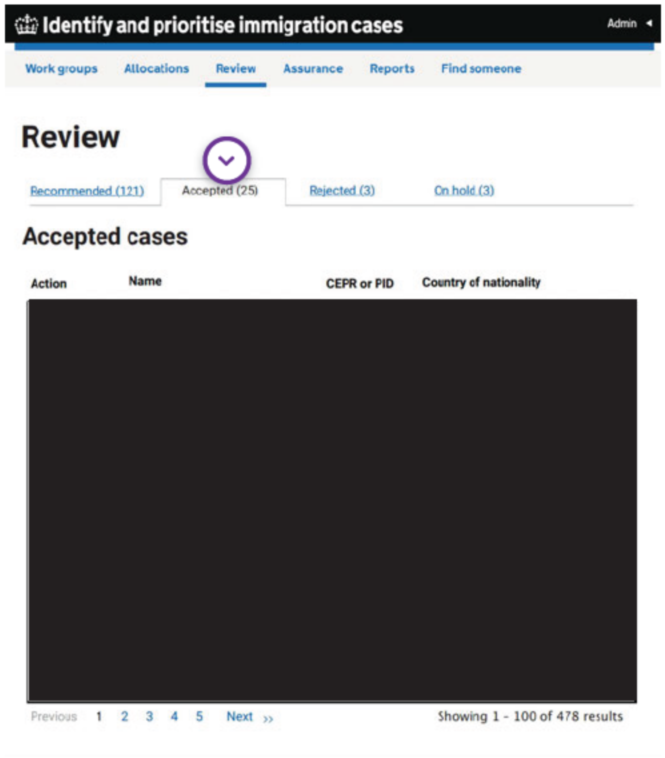


Accepted

Users will now see that the recommendation has been accepted and it shown in a green box. Users can also select 'view accepted cases' to view these.

CONTINUE


Identify and prioritise immigration cases
Admin
Work groups
Allocations
Review
Assurance
Reports
Find someone
Review
Recommended (121)
Accepted (25)
Rejected (3)
On hold (3)
Accepted cases
Action
Name
CEPR or PID
Country of nationality
[redacted]
Previous
1
2
3
4
5
Next ››
Showing 1 - 100 of 478 results



Accepted

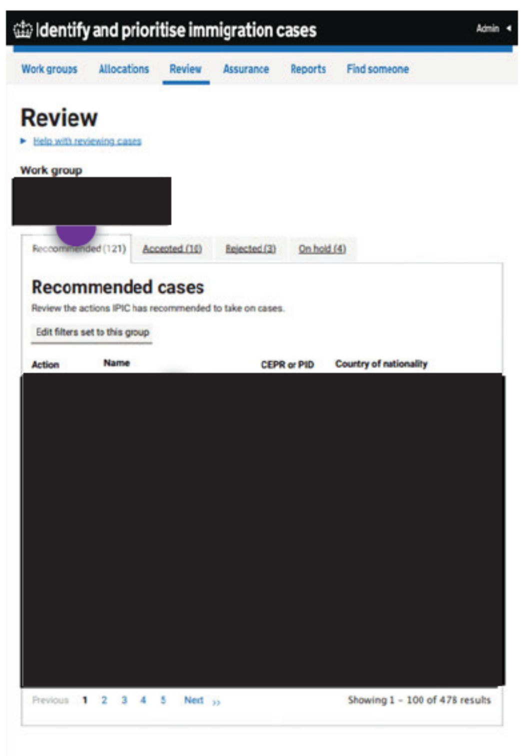
Users will now see the list of accepted cases here

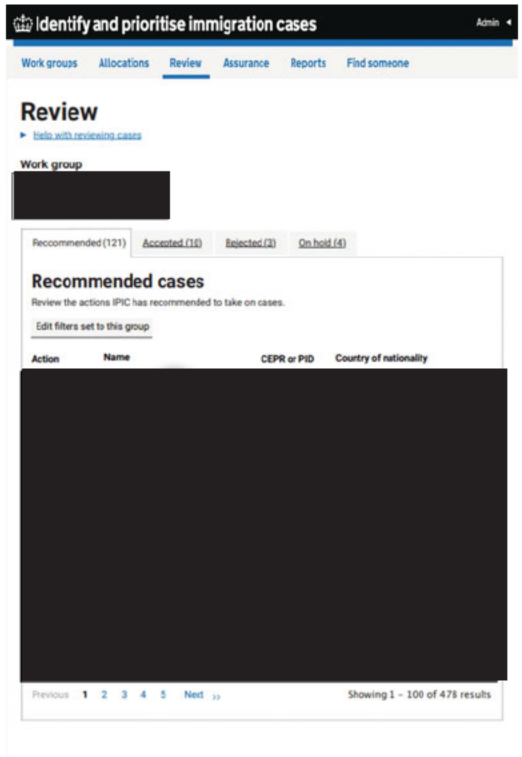
Please note: cases will be held on the accepted tab for 5 days.

Reject Person

[redacted]

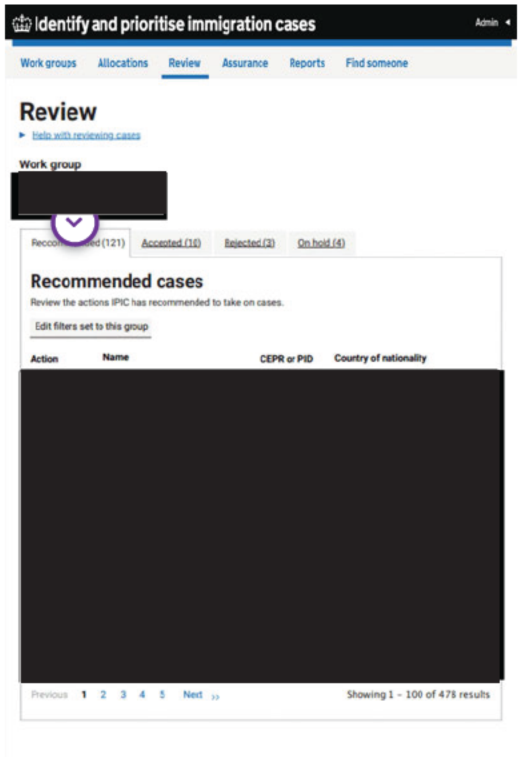
This section demonstrates why and how to reject a recommendation in IPIC.





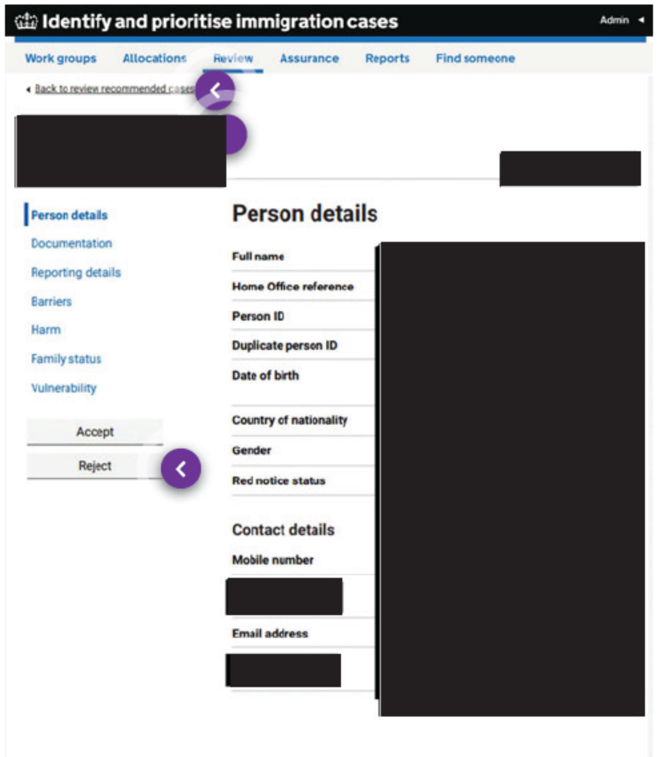
Name

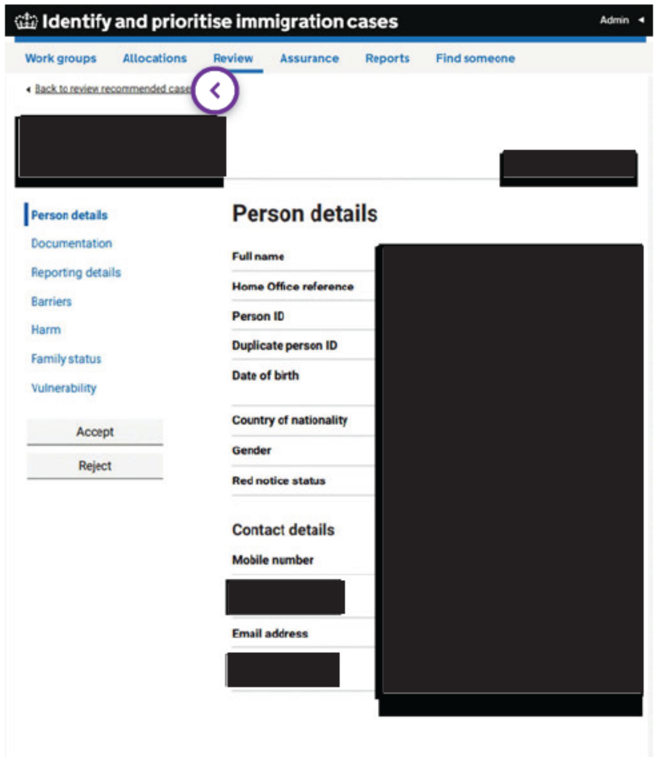
Select on the name of the recommendation wish to be worked



Recommended

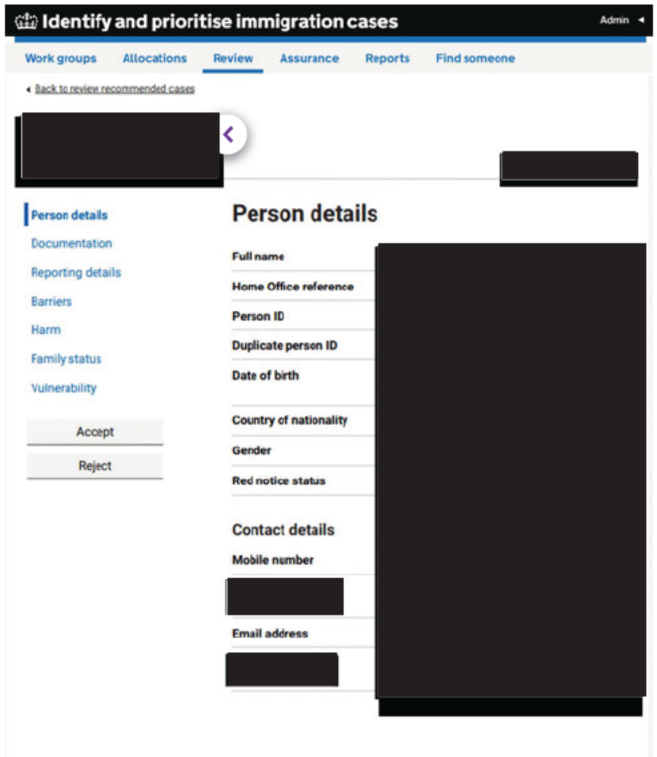
Users will see the list of all recommendations here


Identify and prioritise immigration cases
Admin
Work groups
Allocations
Review
Assurance
Reports
Find someone
Back to review recommended cases
[redacted]
[redacted]
Person details
Documentation
Reporting details
Barriers
Harm
Family status
Vulnerability
Accept
Reject
Person details
Full name
Home Office reference
Person ID
Duplicate person ID
Date of birth
Country of nationality
Gender
Red notice status
Contact details
Mobile number
[redacted]
Email address
[redacted]
[redacted]



Back

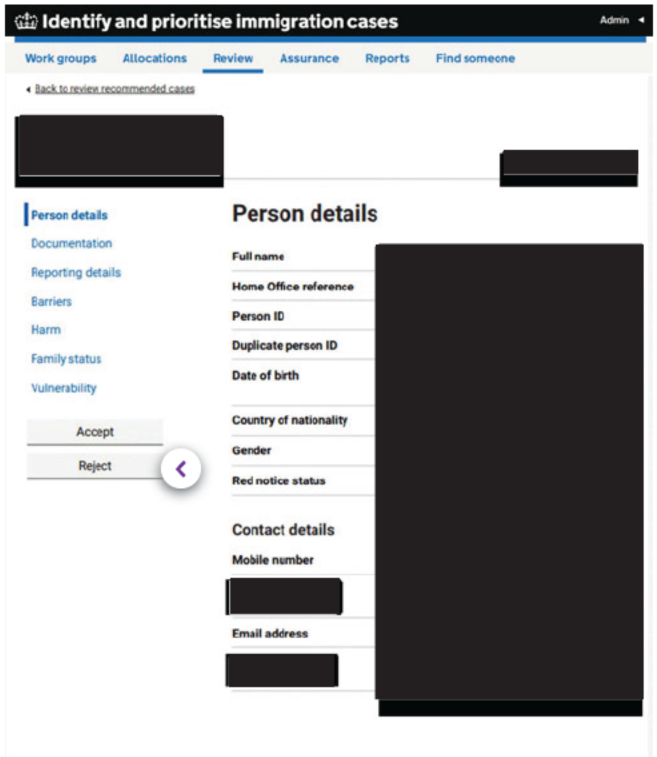
If users would like to go back to view all recommended cases, select 'back to recommended cases'



Person details

When users have selected a recommendation, the persons details will be displayed here.

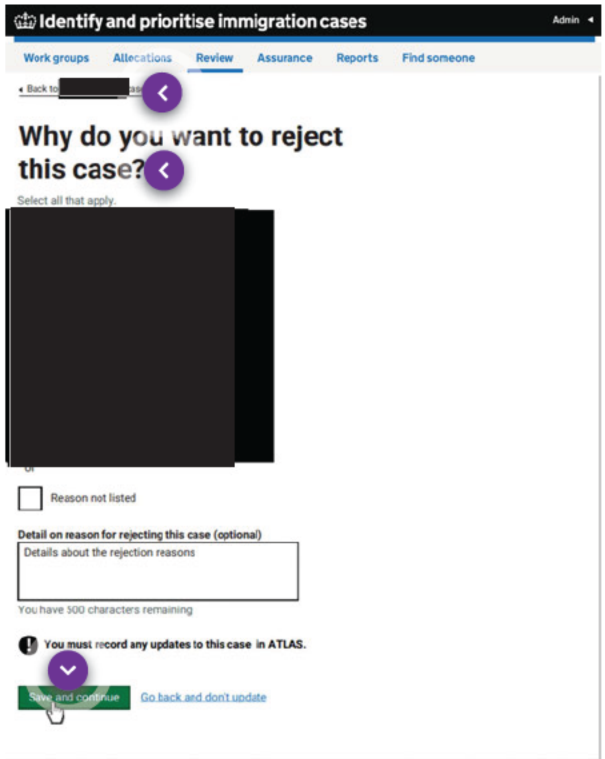
Users will need to review this information on Atlas before accepting or rejecting the recommendation.

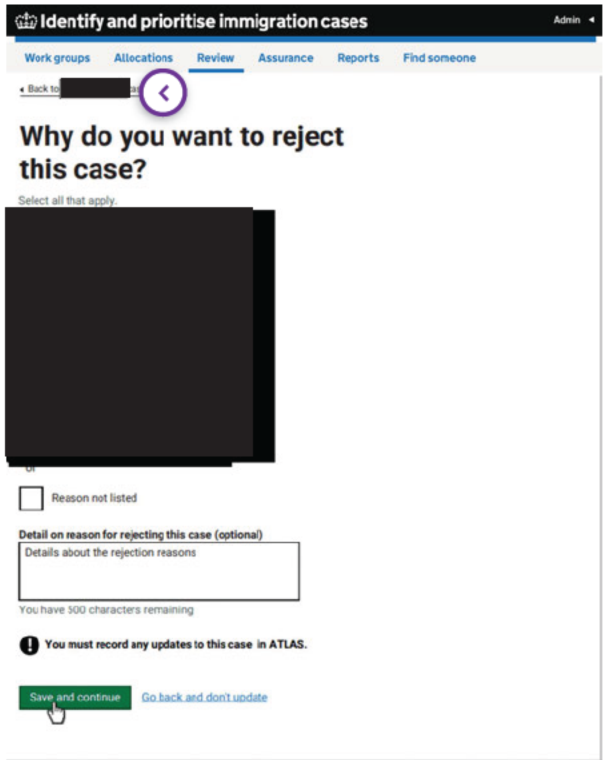


Reject

If the user has decided that IPIC has incorrectly recommended the recommendation, select reject

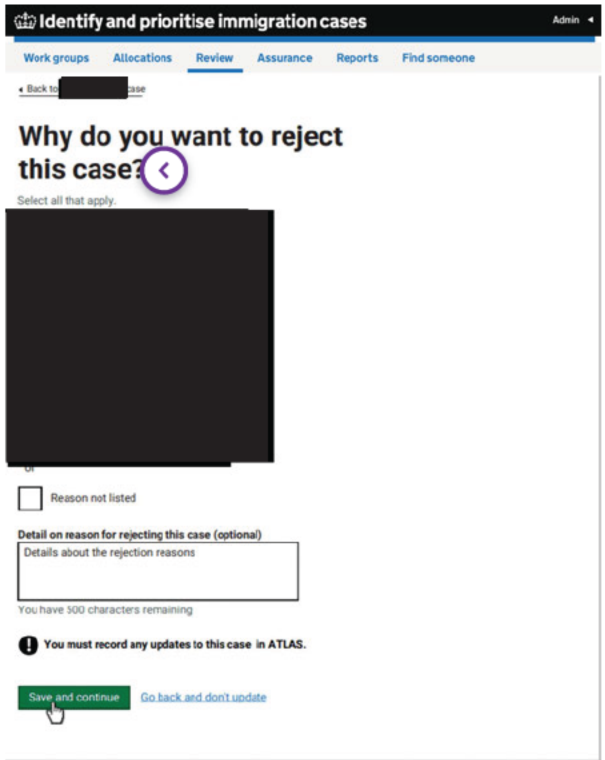
[redacted]


Identify and prioritise immigration cases
Admin
Work groups
Allocations
Review
Assurance
Reports
Find someone
Back to [redacted]
Why do you want to reject this case?
Select all that apply.
[redacted]
or
Reason not listed
Detail on reason for rejecting this case (optional)
Details about the rejection reasons
You have 500 characters remaining
You must record any updates to this case in ATLAS.
Save and continue
Go back and don't update



Back

If users would like to go back to view the details again, select 'back to [redacted]

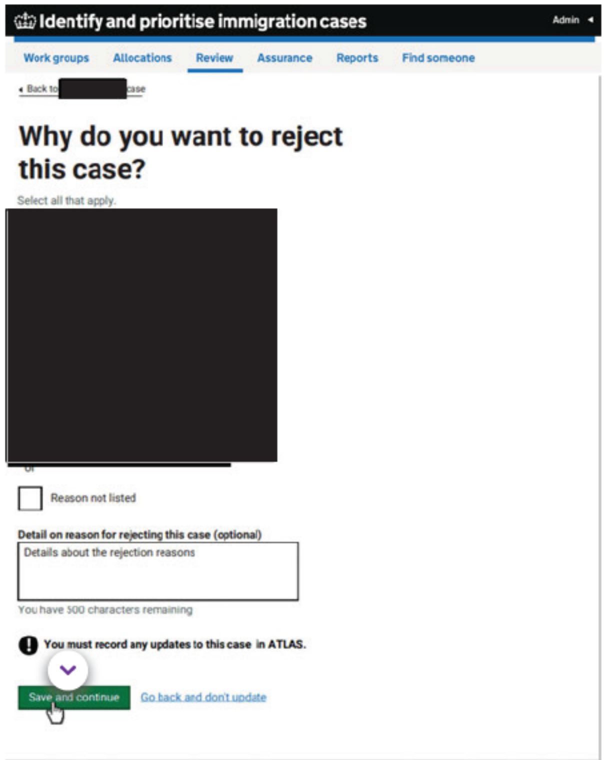


Reasons for rejecting

Users will need to select a reason for why they are rejecting the case. One or more reasons can be selected for this part.

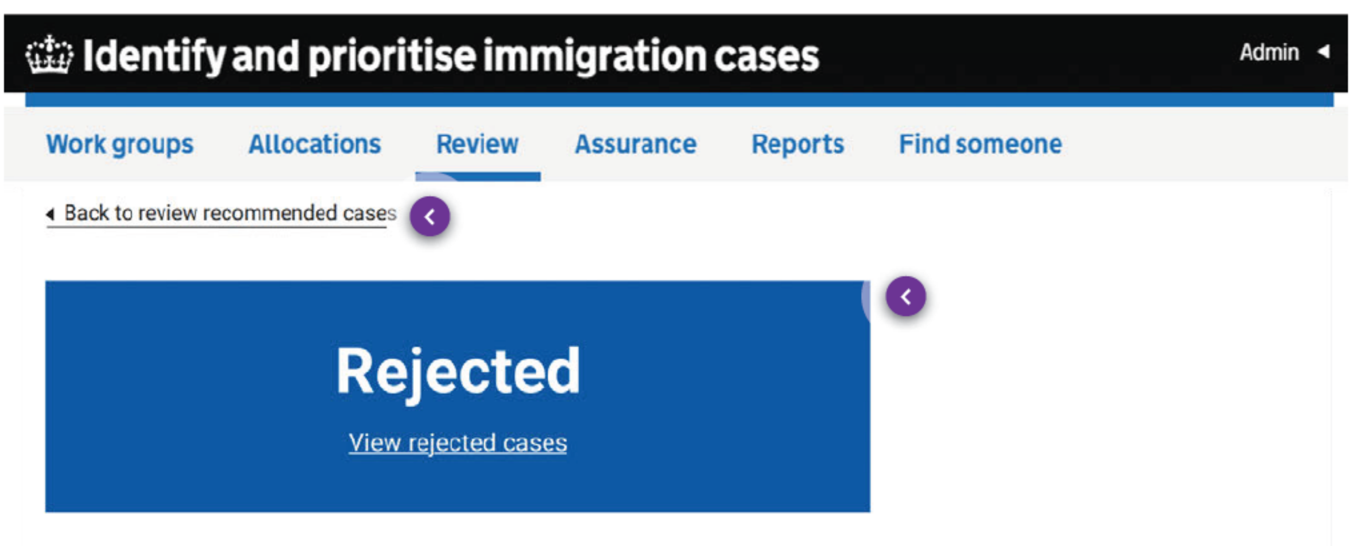
If the reason isn't listed, there is an option to select 'reason not listed'. Select this and then provide details on reason for rejecting the recommendation in the textbox.

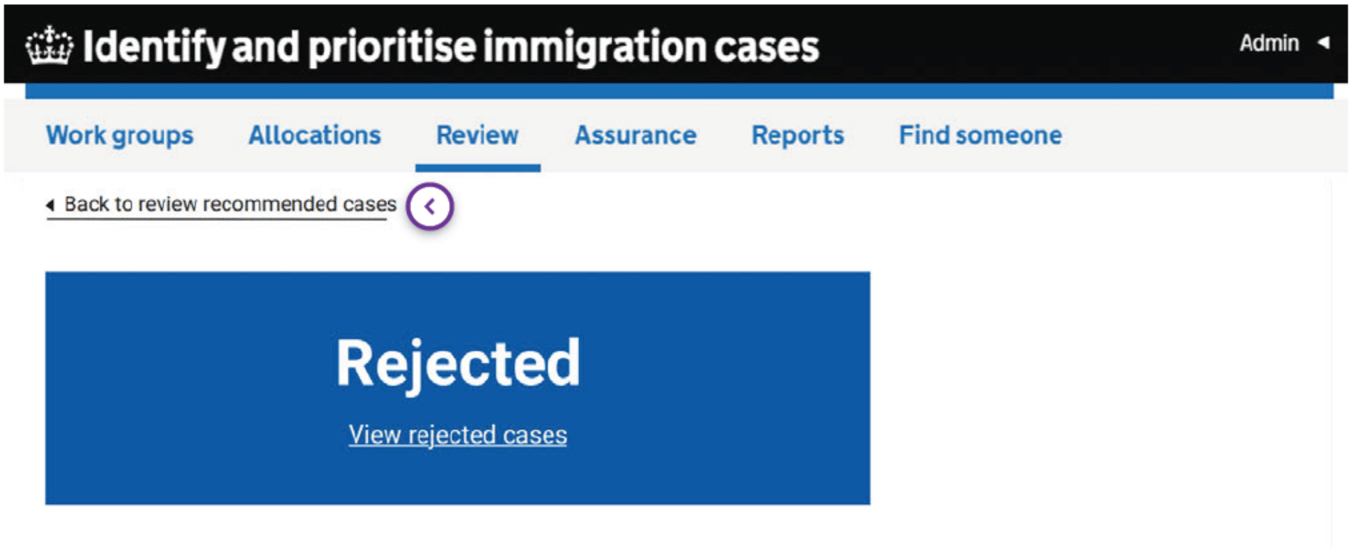
Users will also need to record any updates in ATLAS



Save and continue

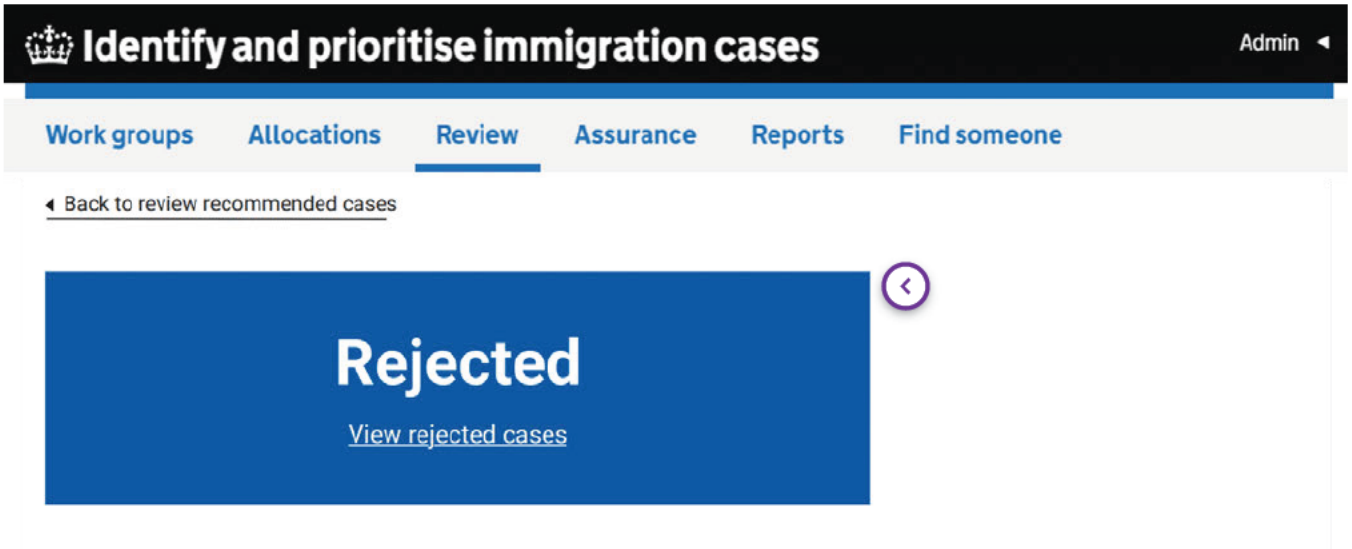
Users can now select the 'save and continue' button. Alternatively, users can select 'go back and don't update' button





Back

If users would like to go back to view all recommended cases, select the 'back to recommended cases' button



Rejected

Users will now see that the recommendation has been rejected and is shown in a blue box

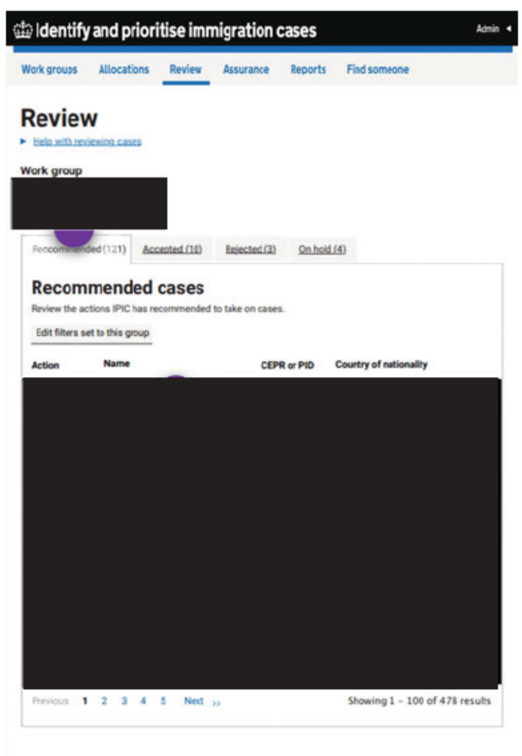
Please note: cases will stay on the rejected tab for 20 days.

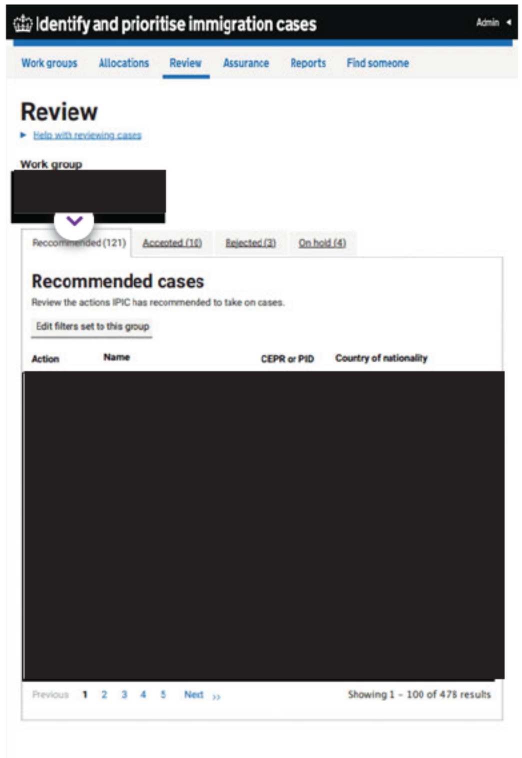
LESSON COMPLETE

On Hold

[redacted]

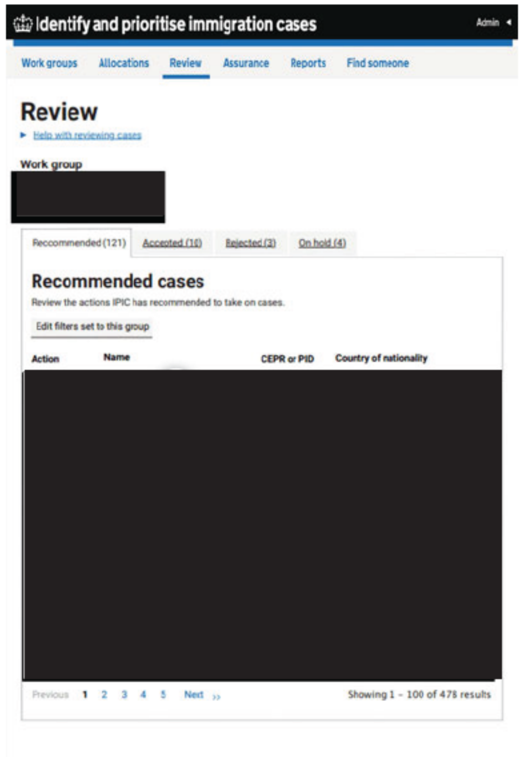
This section demonstrates how to place a recommendation on hold and why this would be appropriate.





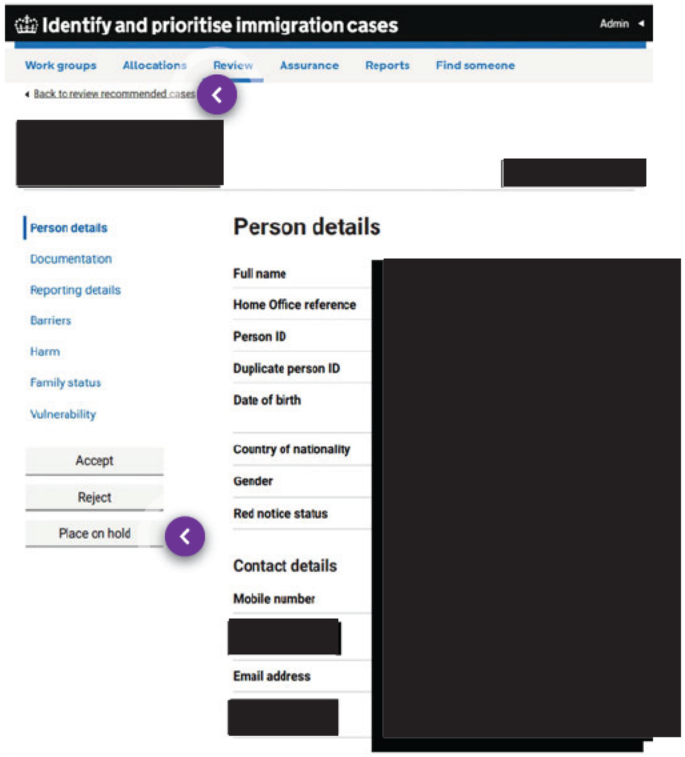
Recommended

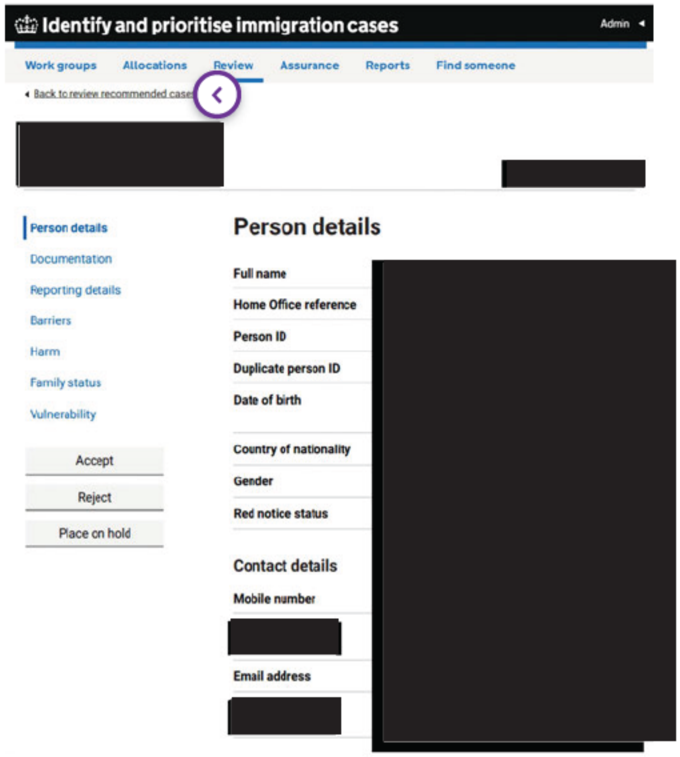
Users will see the list of all recommendations here



Name

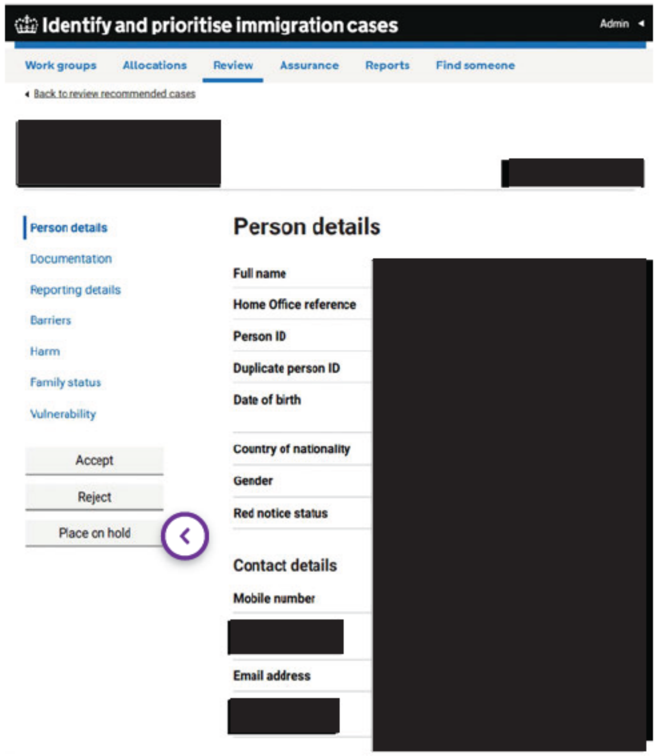
Select on the name of the recommendation that needs to be worked


Identify and prioritise immigration cases
Admin
Work groups
Allocations
Review
Assurance
Reports
Find someone
Back to review recommended cases
[redacted]
[redacted]
Person details
Documentaton
Reporting details
Barriers
Harm
Family status
Vulnerability
Accept
Reject
Place on hold
Person details
Full name
Home Office reference
Person ID
Duplicate person ID
Date of birth
Country of nationality
Gender
Red notice status
Contact details
Mobile number
[redacted]
Email address
[redacted]
[redacted]



Back

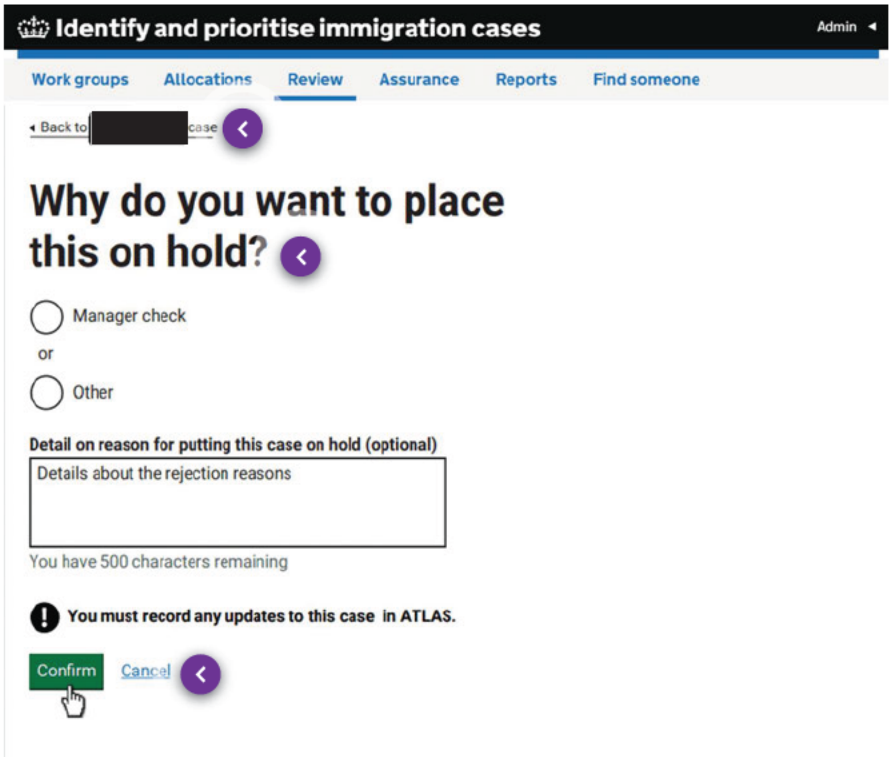
If users would like to go back to view all recommended cases, select the 'back to recommended cases' button



Place on hold

When users have selected a recommendation from the previous section, the persons details will be displayed here. Users will need to review this information thoroughly before accepting or rejecting the recommendation. If unsure, users can place the case on hold until they have reached a decision.

For example, this might be appropriate to seek advice from management or check guidance.


Identify and prioritise immigration cases
Admin

Work groups | Allocations | Review | Assurance | Reports | Find someone

Back to [redacted] case

Why do you want to place this on hold?

- Manager check

or

- Other

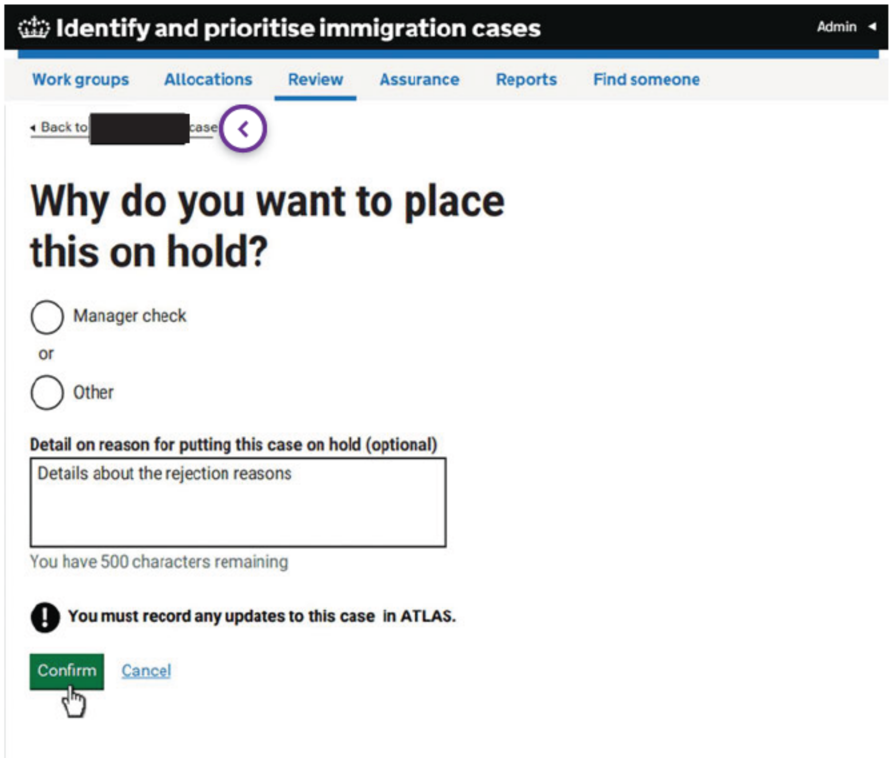
Detail on reason for putting this case on hold (optional)

Details about the rejection reasons

You have 500 characters remaining

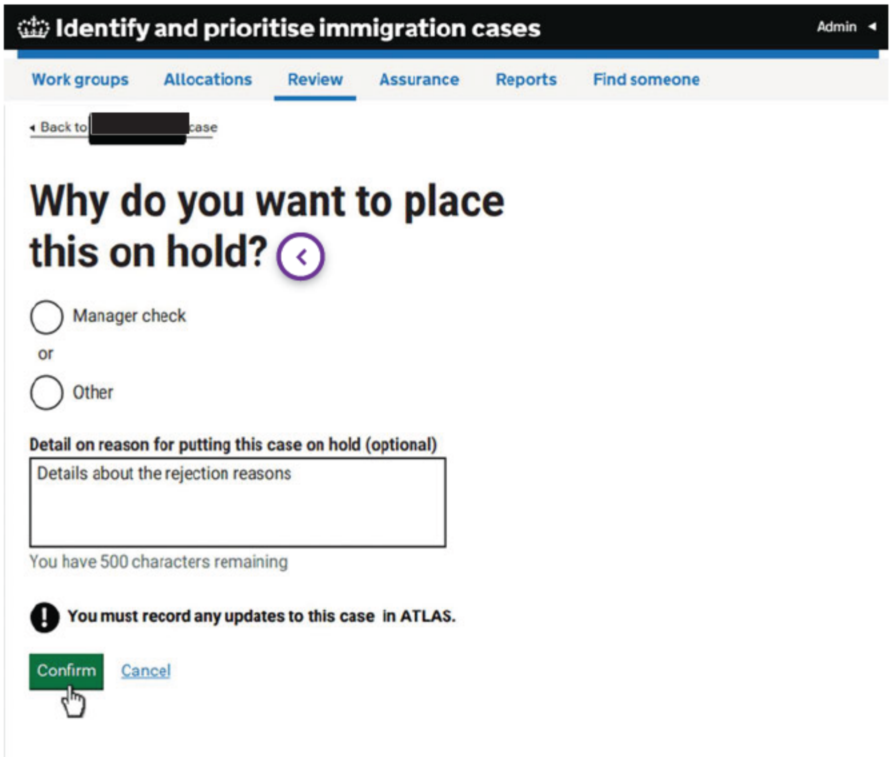
You must record any updates to this case in ATLAS.

Confirm   Cancel



Back

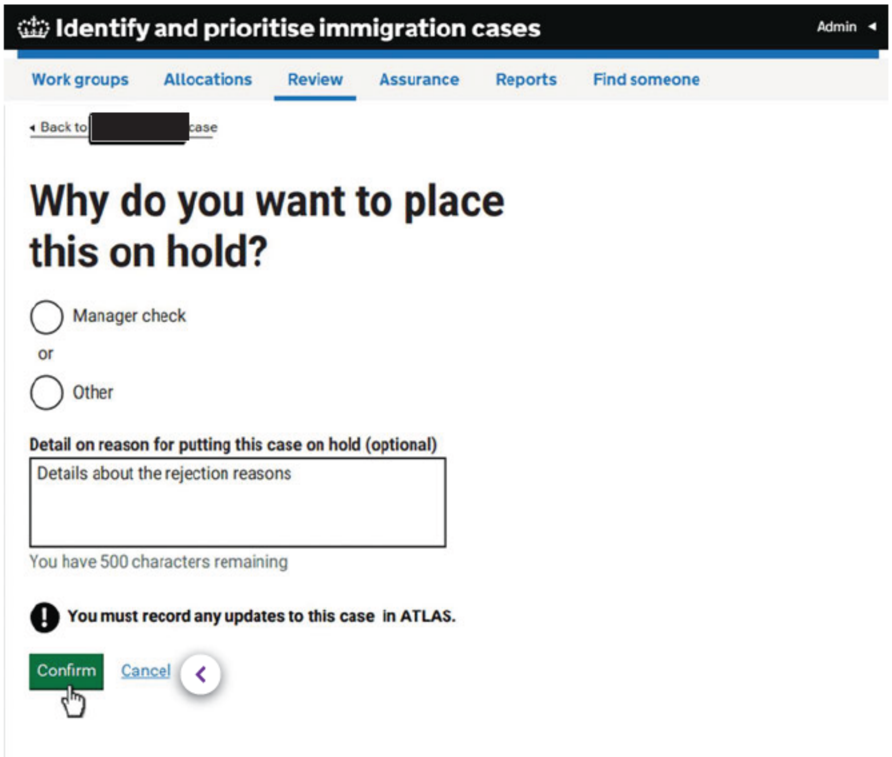
If users would like to go back to view the details again, select 'back to [redacted] case'



Why?

The user will need to select a reason why they are placing the recommendation on hold. This can be due to a manager check or another reason.

If its 'other', please enter the details about it in the textbox



Confirm/Cancel

All information must be recorded on ATLAS, then the users will need to select 'confirm' or 'cancel'

Back

If users would like to go back to view all recommended cases, select the 'back to recommended cases' button

On hold

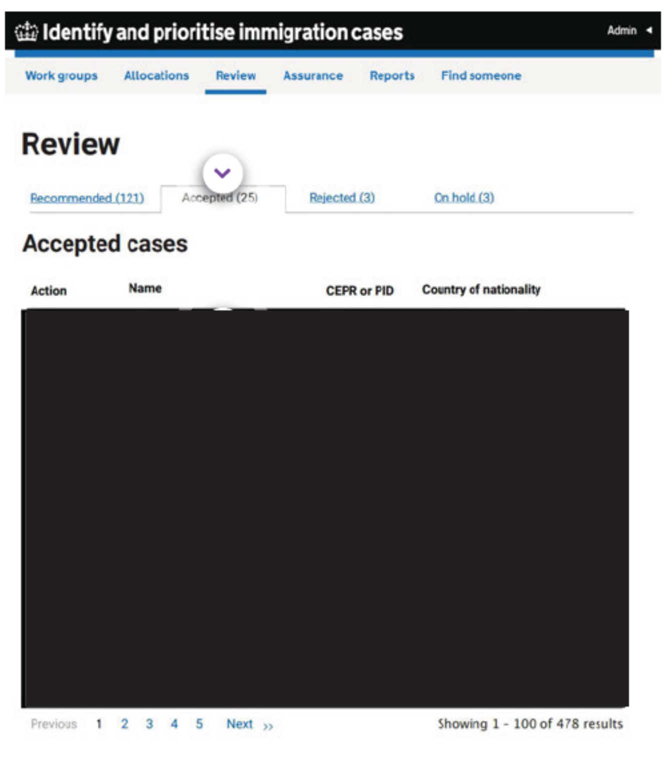
Users will now see that the recommendation has been placed on hold.
Users can select 'view cases on hold' to view all recommendations on hold

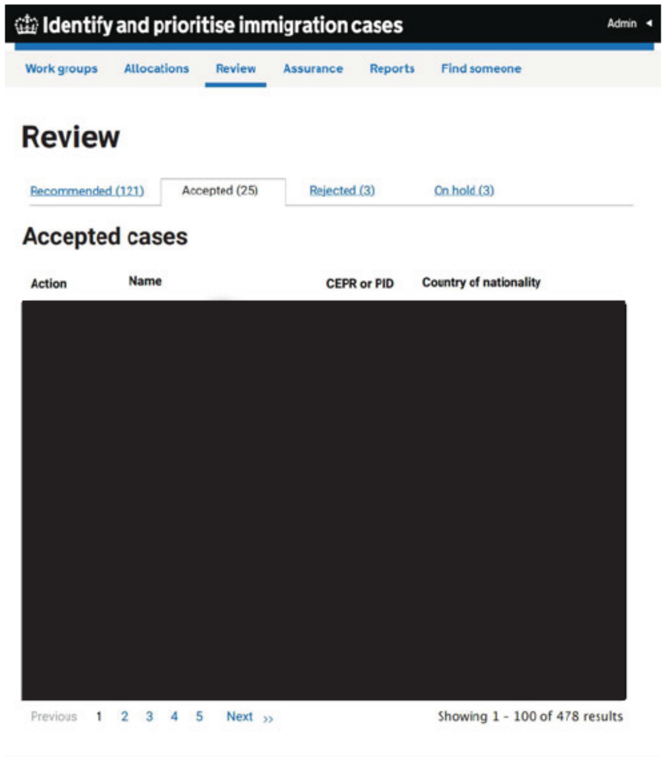
LESSON COMPLETE

Changing a decision

[redacted]

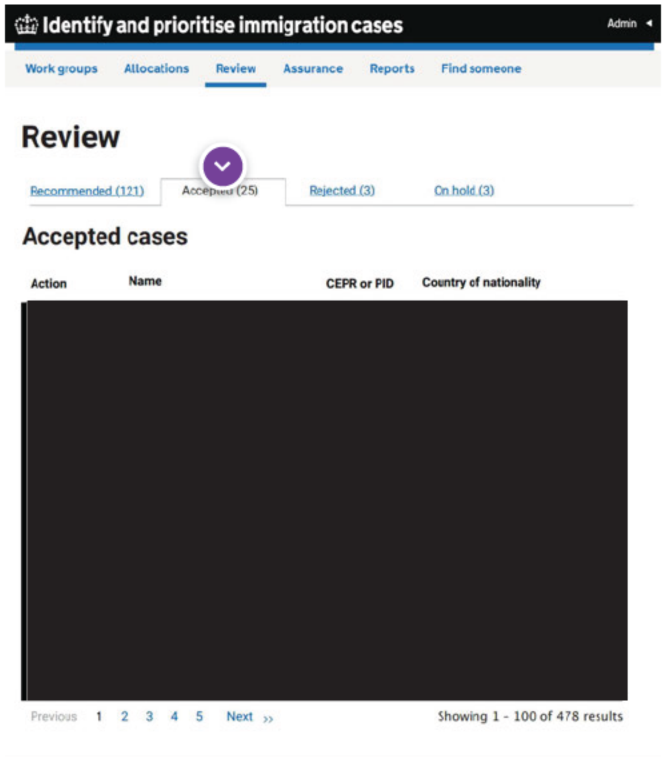
This section demonstrates how to change a recommendation that already has a decision.





Name

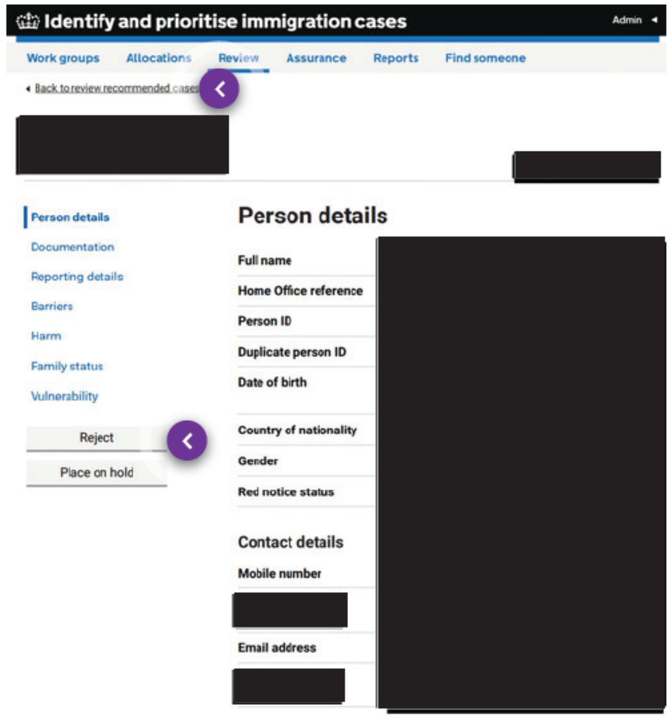
Select the relevant recommendation by selecting the name



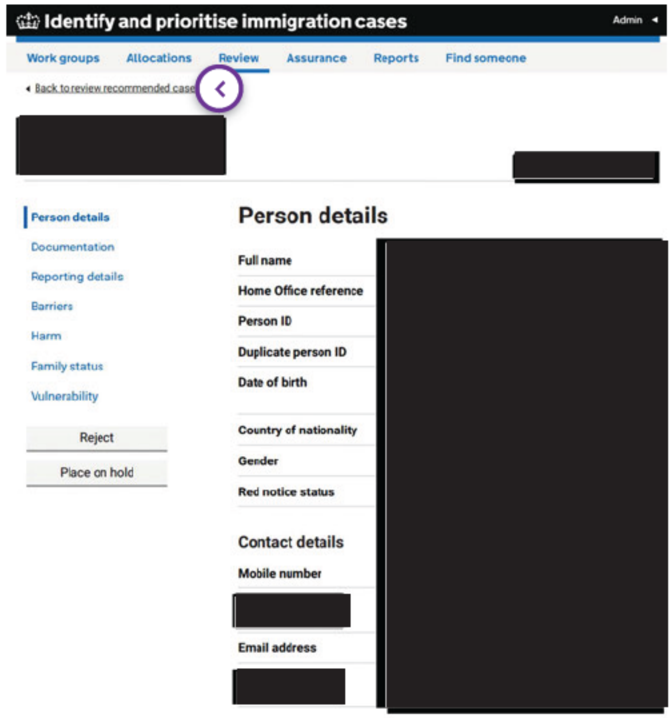
Accepted

If the user has accepted a recommendation but now needs to change it, select on the accepted tab and select the recommendation that needs amending.

Please note - this should only be done if a mistake was made, not if something changes after the initial decision

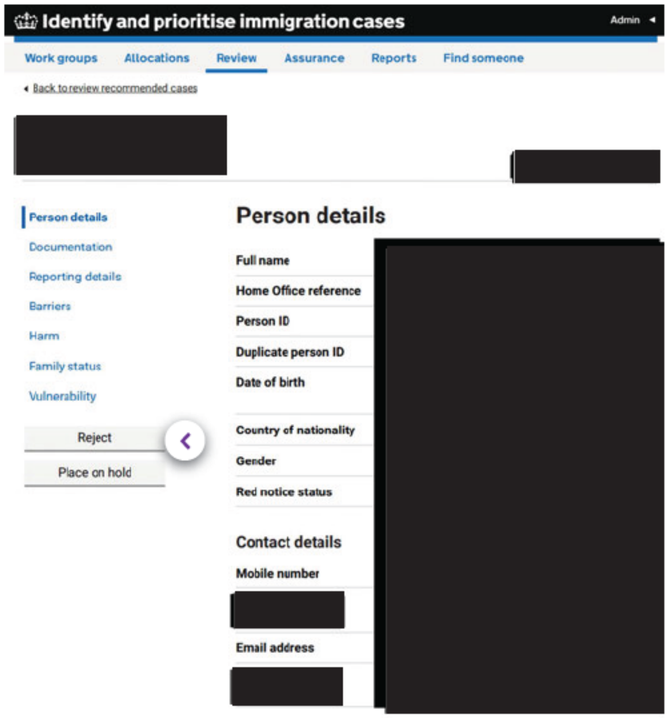


Identify and prioritise immigration cases
Admin
Work groups
Allocations
Review
Assurance
Reports
Find someone
Back to review recommended cases
[redacted]
[redacted]
Person details
Documentation
Reporting details
Barriers
Harm
Family status
Vulnerability
Reject
Place on hold
Person details
Full name
Home Office reference
Person ID
Duplicate person ID
Date of birth
Country of nationality
Gender
Red notice status
Contact details
Mobile number
[redacted]
Email address
[redacted]
[redacted]



Back

Select 'back to review recommended cases' to go back to the list of recommendations



Decision

Users can now reselect a decision for this recommendation by selecting 'reject' or 'place on hold'

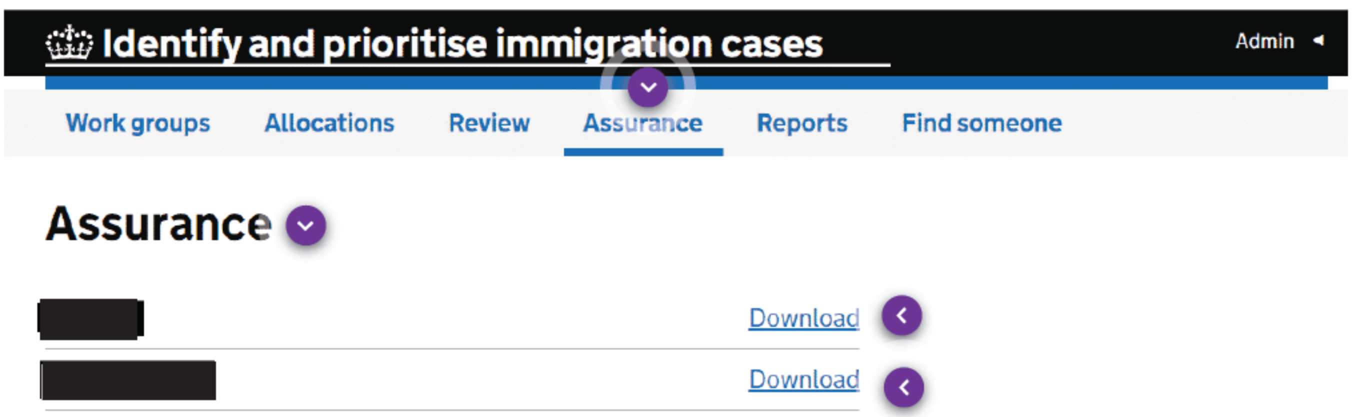
If this recommendation was initially rejected, users will see the following buttons:

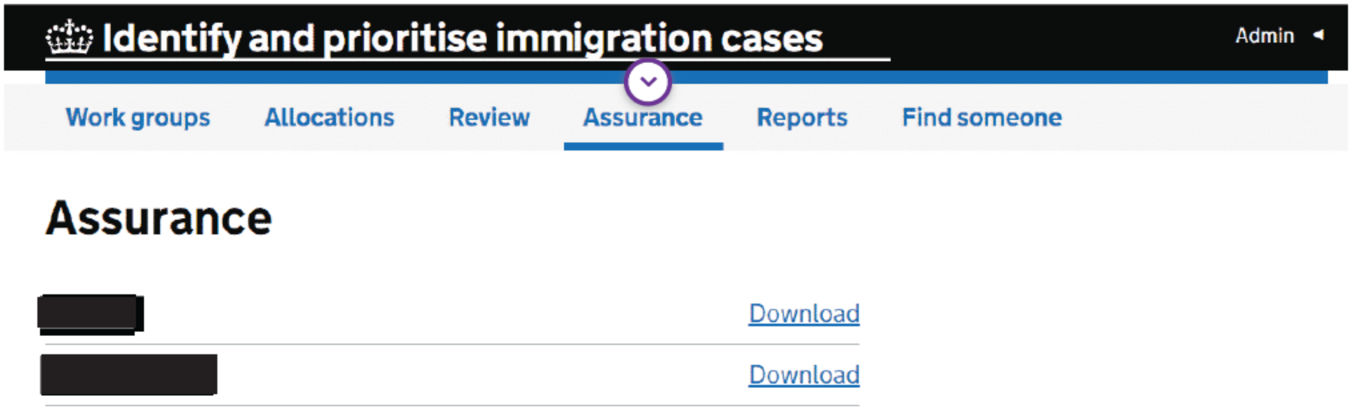
'Accept'
'Place on hold'

Assurance

[redacted]

This section will explain how the assurance works within IPIC.





Assurance

Select 'assurance' tab.

Identify and prioritise immigration cases

Admin

Work groups | Allocations | Review | Assurance | Reports | Find someone

Assurance

[redacted] Download

[redacted] Download

Assurance Downloads

These downloads will give users the individuals [redacted]

[redacted]

Identify and prioritise immigration cases

Admin

Work groups | Allocations | Review | Assurance | Reports | Find someone

Assurance

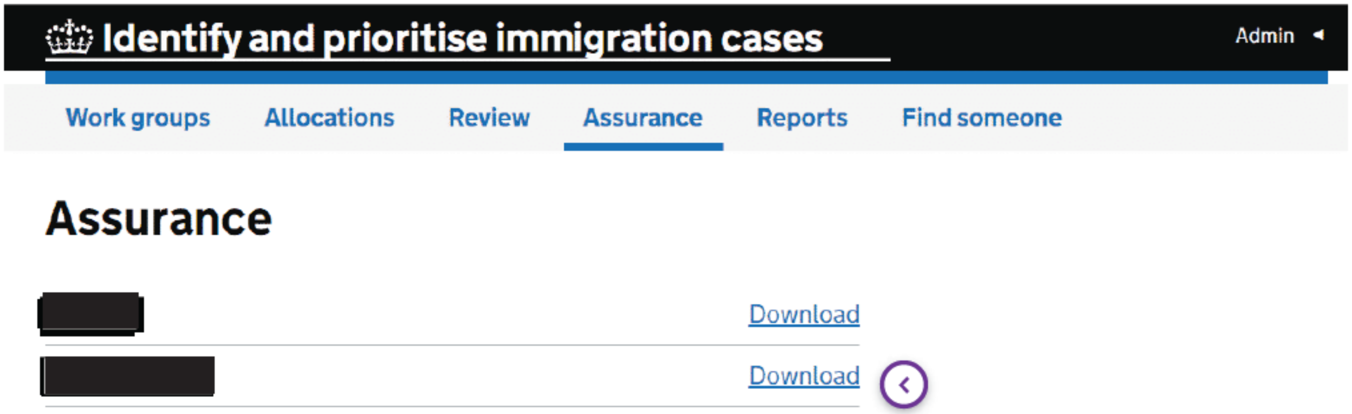
[redacted]	Download
[redacted]	Download

IBDR 7

[redacted]

This will allow users to download the data which shows people [redacted]

An example of the downloaded report is shown



IBDR Monthly

[redacted]

This will allow users to download the data which shows people [redacted]

An example of the downloaded report is shown

Editing a users permissions

[redacted]

This section explains how managers can change the permissions of other users within NRPCs IPIC products.

Setup

Select the user setup button to get started

Poise ID

Enter the POISE ID of the user who's access needs to be amended and select continue

Please note: if the POISE ID cannot be found, then it means the user is not in the IPIC system and a request will need to be made to have them added to IPIC.

To do this, users will need to request access via [redacted]

Identify and prioritise immigration cases

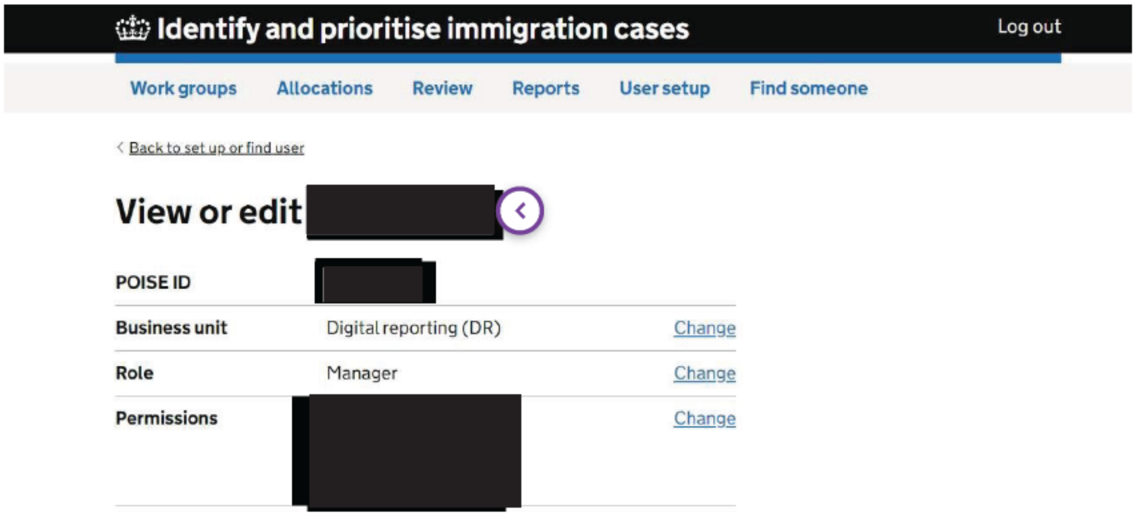
Log out

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

< Back to set up or find user

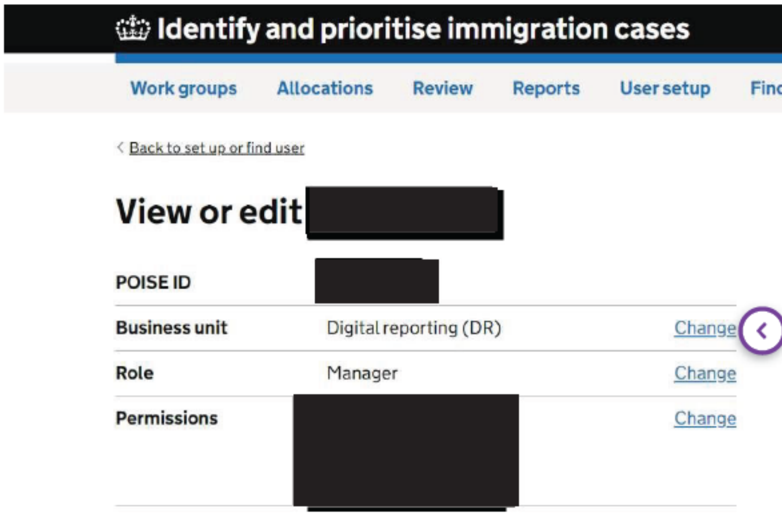
View or edit [redacted]

POISE ID	[redacted]	
Business unit	Digital reporting (DR)	Change
Role	Manager	Change
Permissions	[redacted]	Change

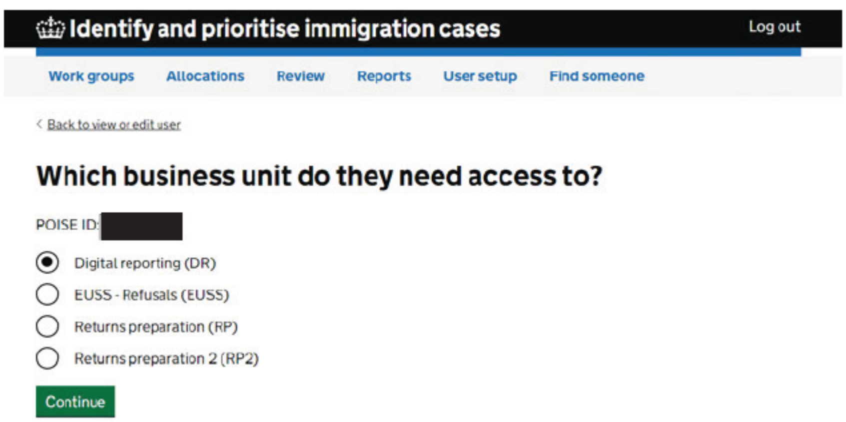


View or edit

Users can amend the business unit, role and permissions by selecting the change button



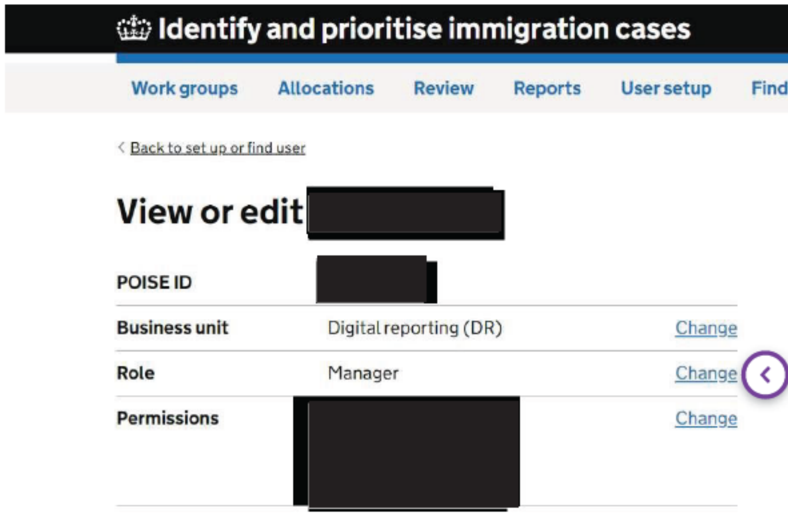
Business Unit



Select the business unit, for this training, Digital Reporting has been selected

This can be amended by selecting change

Business Unit is the service being used, i.e. Digital Reporting.



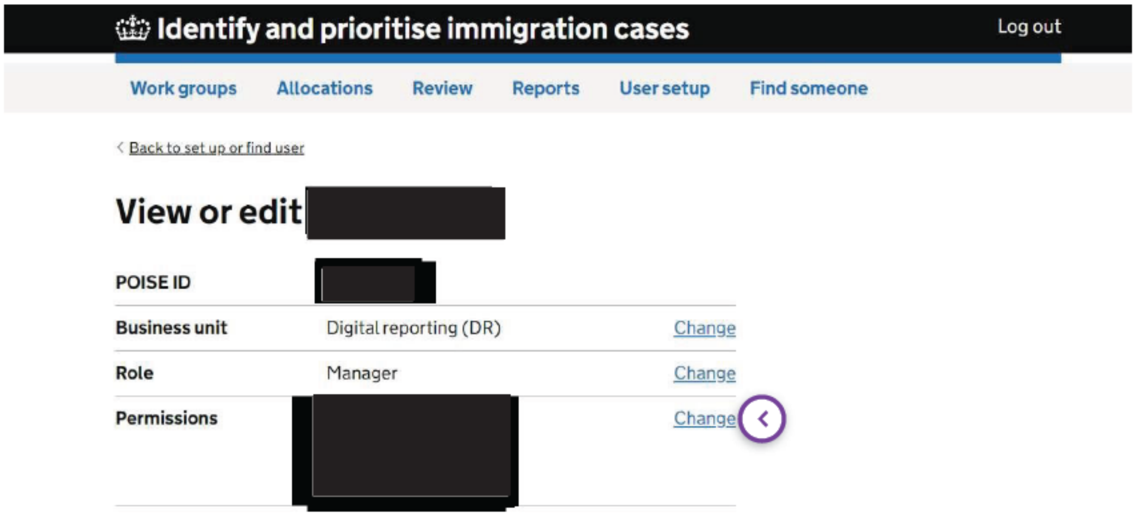
Role

Select what IPIC access the user requires, manager or caseworker access

This can be amended by selecting change

A manager is someone who will set up the workgroups and allocate the work but might not necessarily need to review the recommendations that are allocated

A caseworker in IPIC is someone who will go on to IPIC to review the cases that a manager has allocated to them and make the decision whether to accept/reject/place on hold and then perform the task in ATLAS



Permissions

Select the specific permissions to be assigned to the user

These can be amended by selecting change

Permissions is the access to specific rules, if a manager.

CONTINUE

Identify and prioritise immigration cases   Log out

Work groups   Allocations   Review   Reports   User setup   Find someone

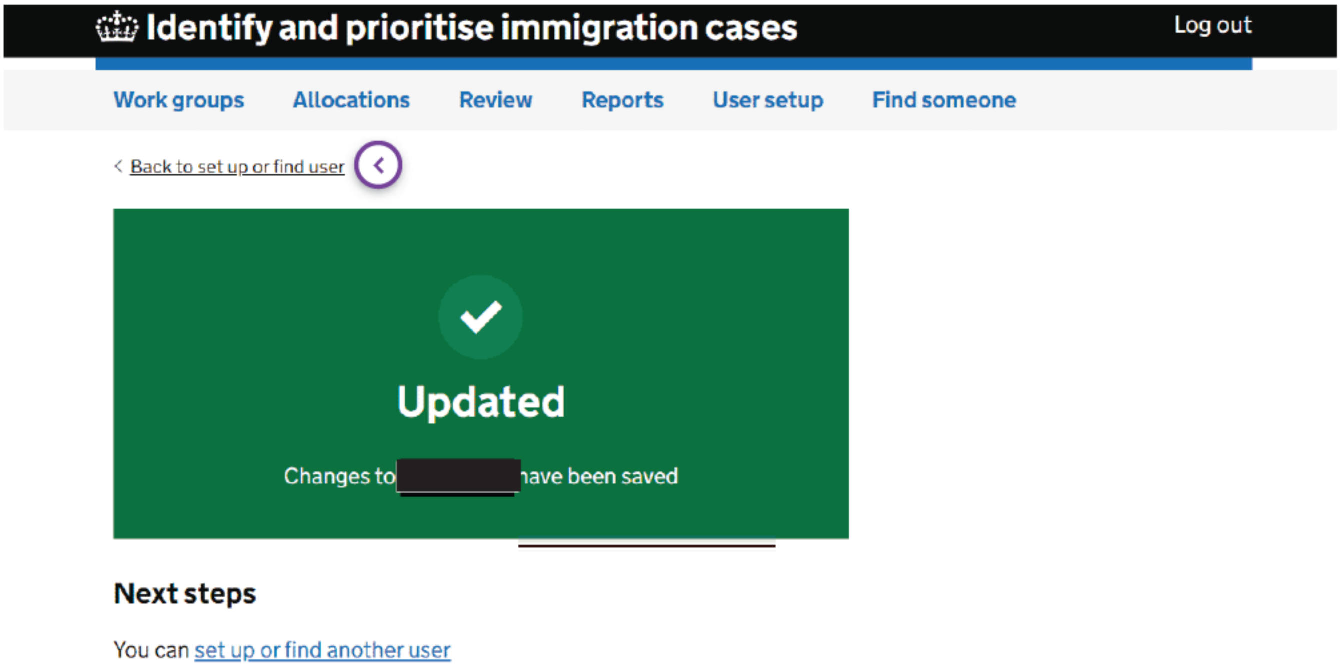
< Back to set up or find user

Updated

Changes to [redacted] have been saved

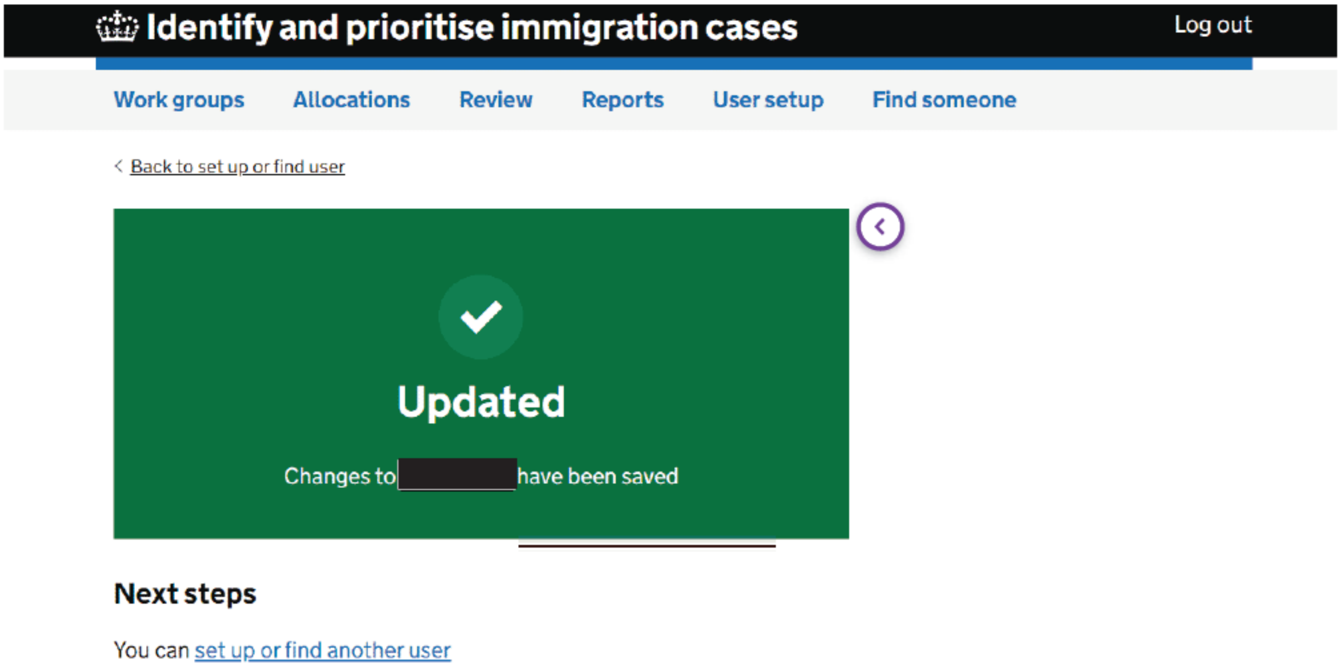
Next steps

You can set up or find another user



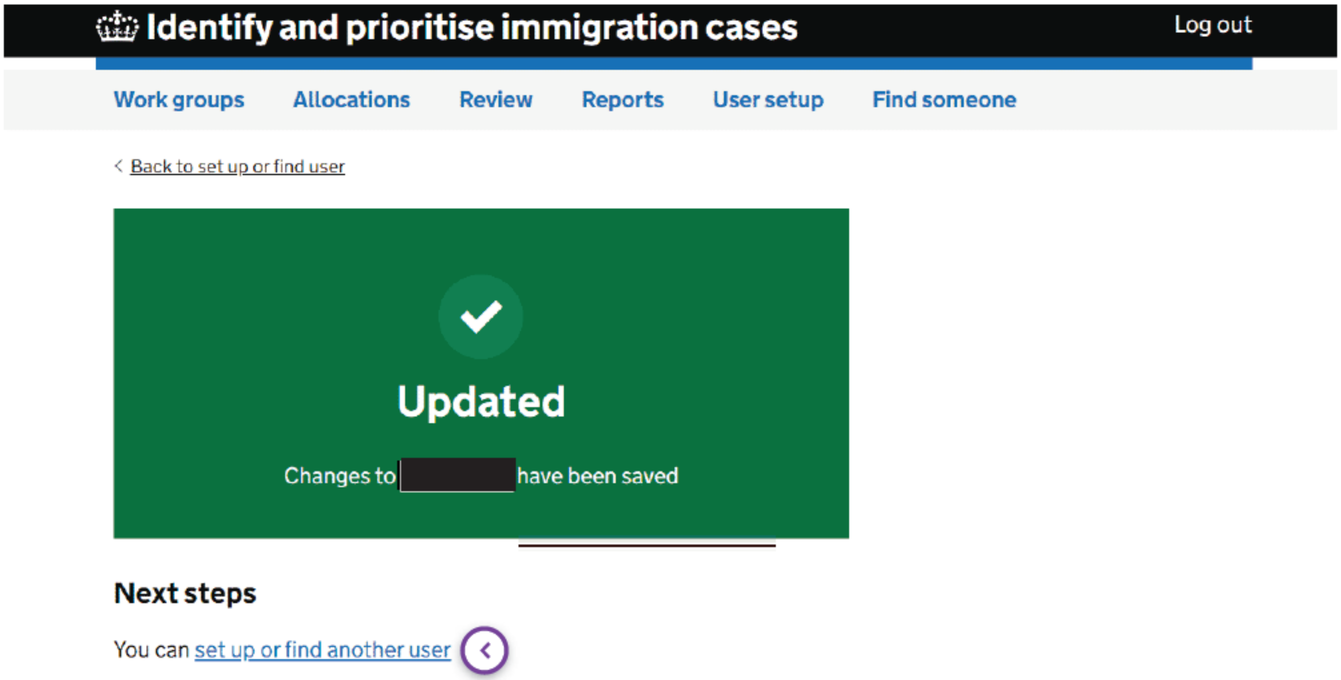
Back

Users can select 'back to set up or find user'



Updated

Users will now see a screen showing that the information has been updated



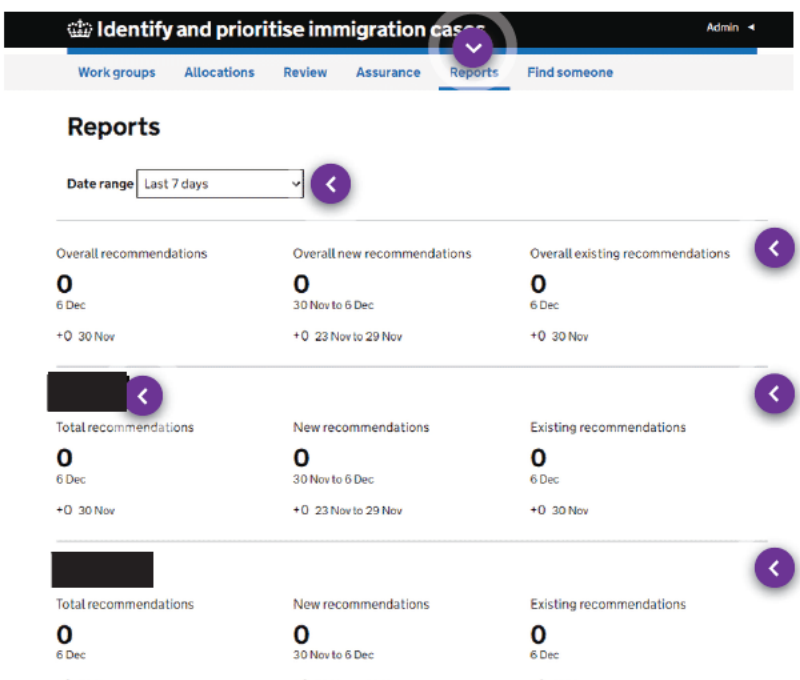
Setup another user

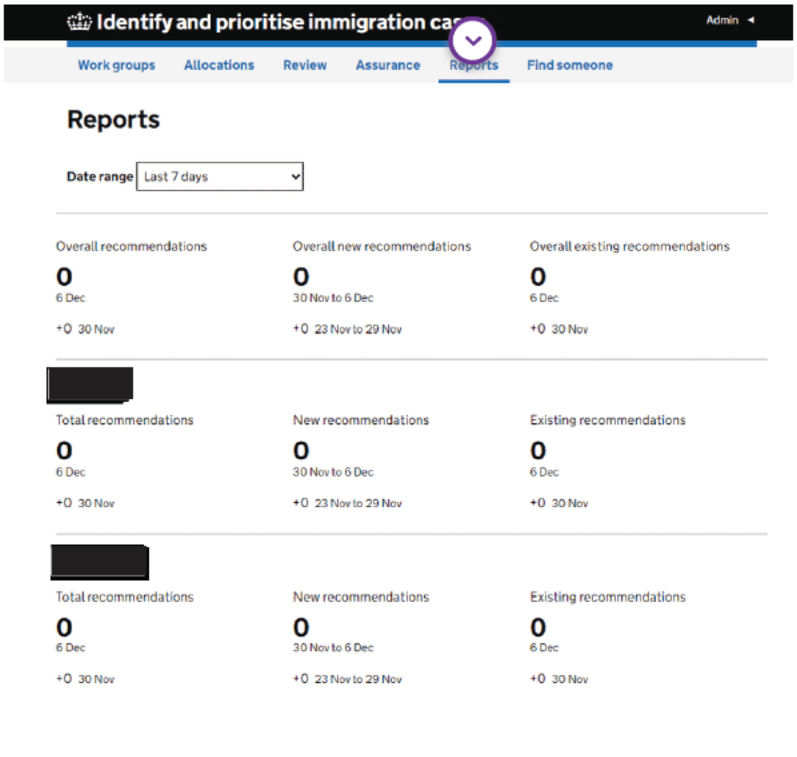
Users can now also select 'setup or find another user'

Reports

[redacted]

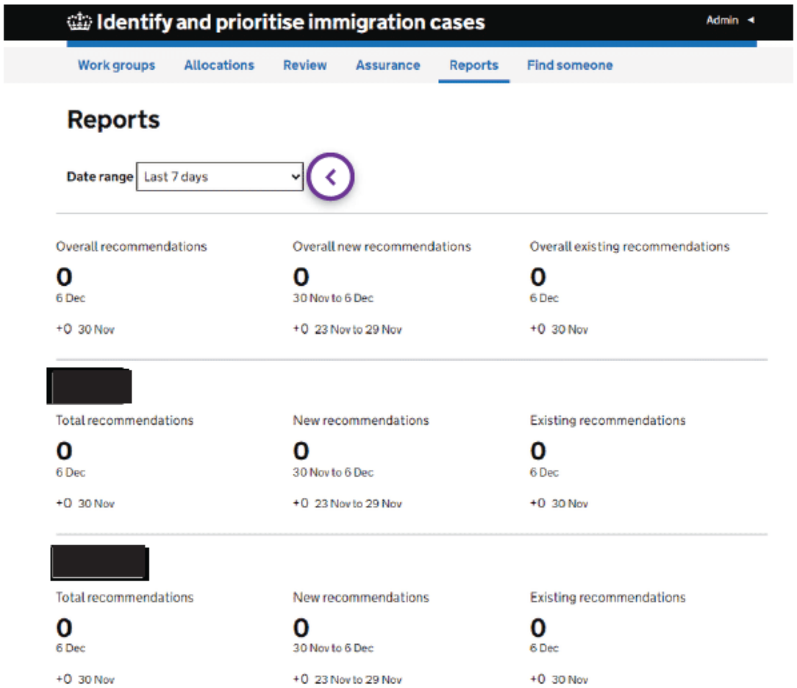
This area of IPIC is used to display and download Management Information (MI) reports which show a breakdown of all undertaken activity on IPIC within a date range.

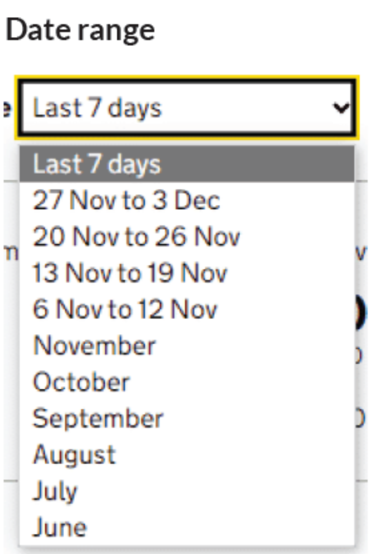




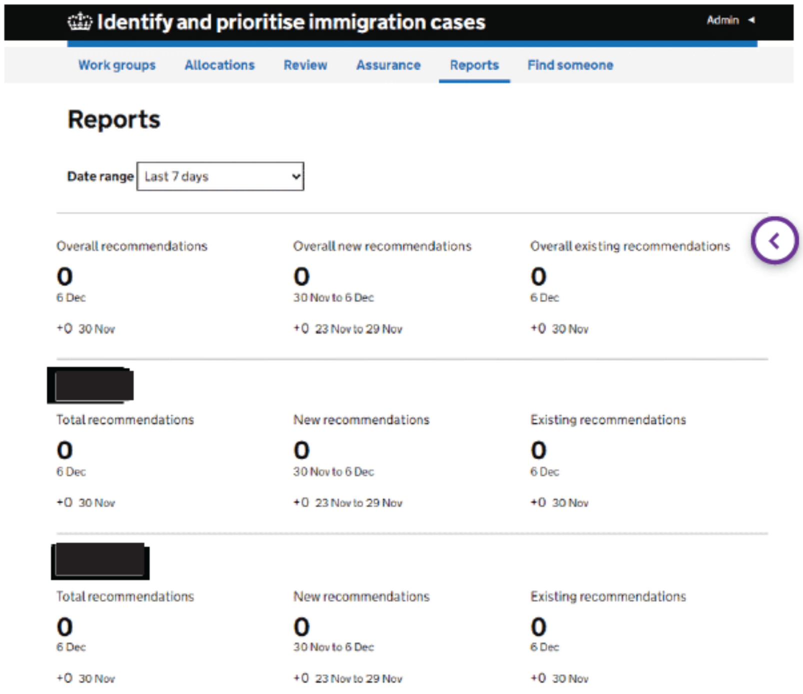
Reports

Select the reports tab



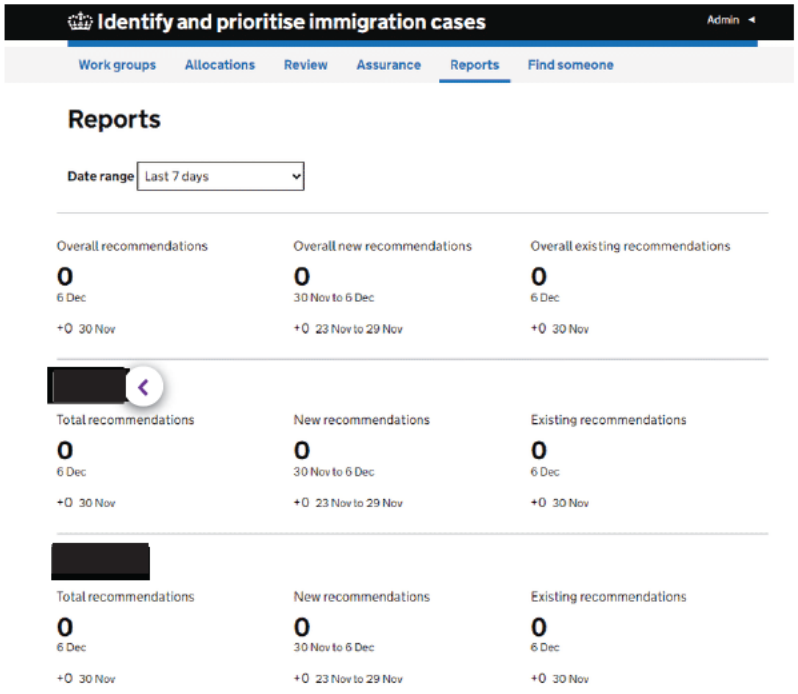


Using the dropdown menu, users will see the last 7 days, the last 4 weeks weekly and then the last 6 full months of MI



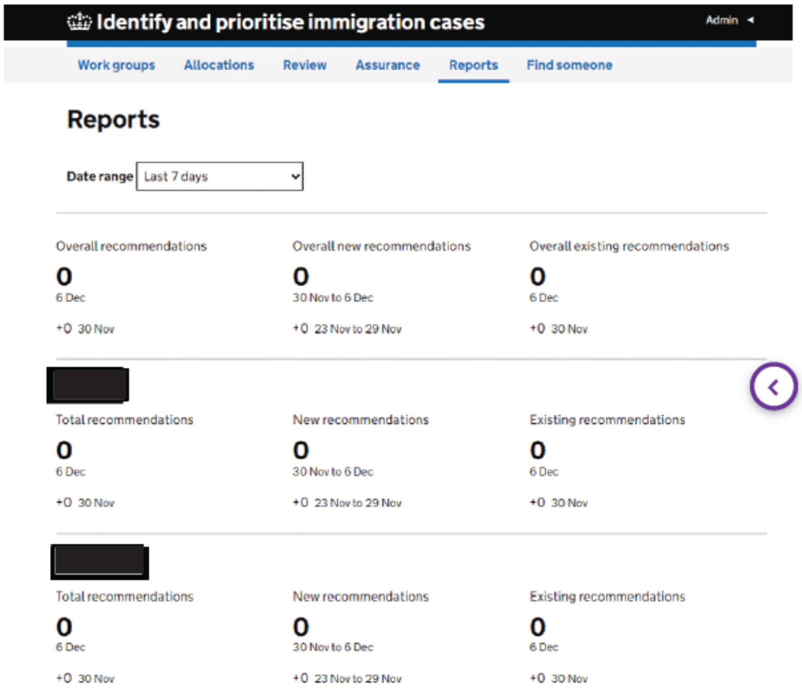
Overall recommendations

The total number of recommendations for inflow AND outflow is displayed. The trend information shows how many more or less recommendations there are based on the dates



[redacted]

Select [redacted] to see the breakdown of information held within this section

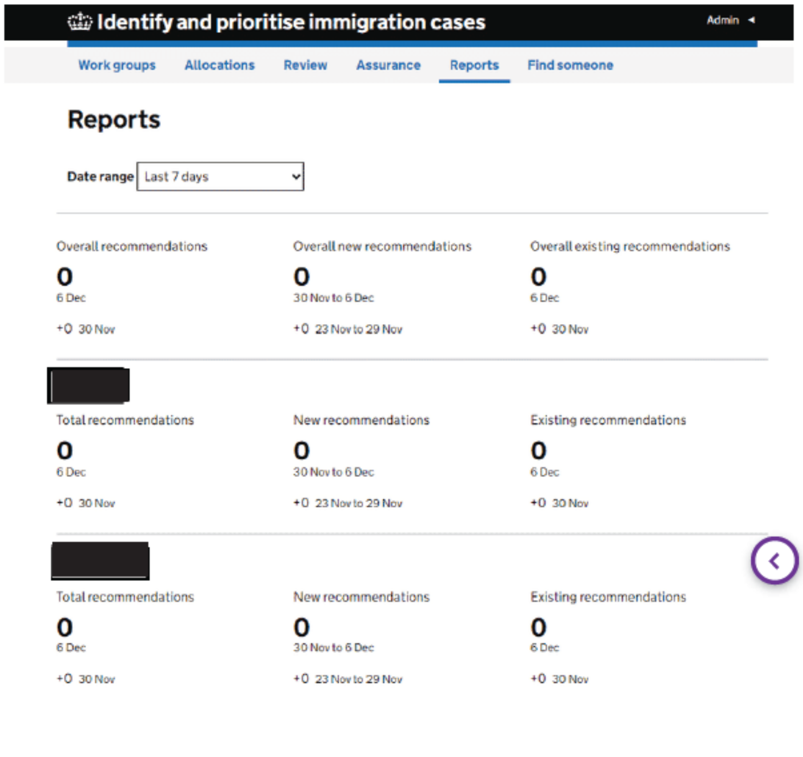


[redacted]

The total number of recommendations for [redacted] is displayed. The trend information shows how many more or less recommendations there are based on the dates

New recommendations - have met the [redacted] business rule in the last 14 days (based on the date range selected)

Existing recommendations - these are recommendations that are older than 14 days



[redacted]

The total number of recommendations for [redacted] is displayed. The trend information shows how many more or less recommendations there are based on the dates

Identify and prioritise immigration cases Admin

Work groups | Allocations | Review | Assurance | Reports | Find someone

< Back to Reports

[redacted]

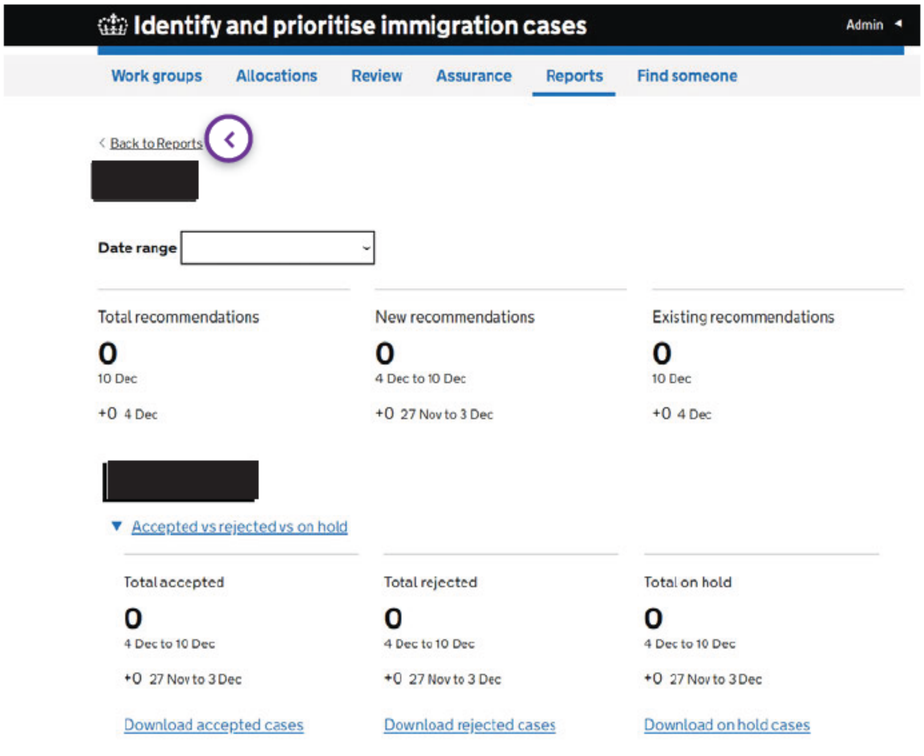
Date range

Total recommendations	New recommendations	Existing recommendations
0	**0**	**0**
10 Dec	4 Dec to 10 Dec	10 Dec
+0 4 Dec	+0 27 Nov to 3 Dec	+0 4 Dec

[redacted]

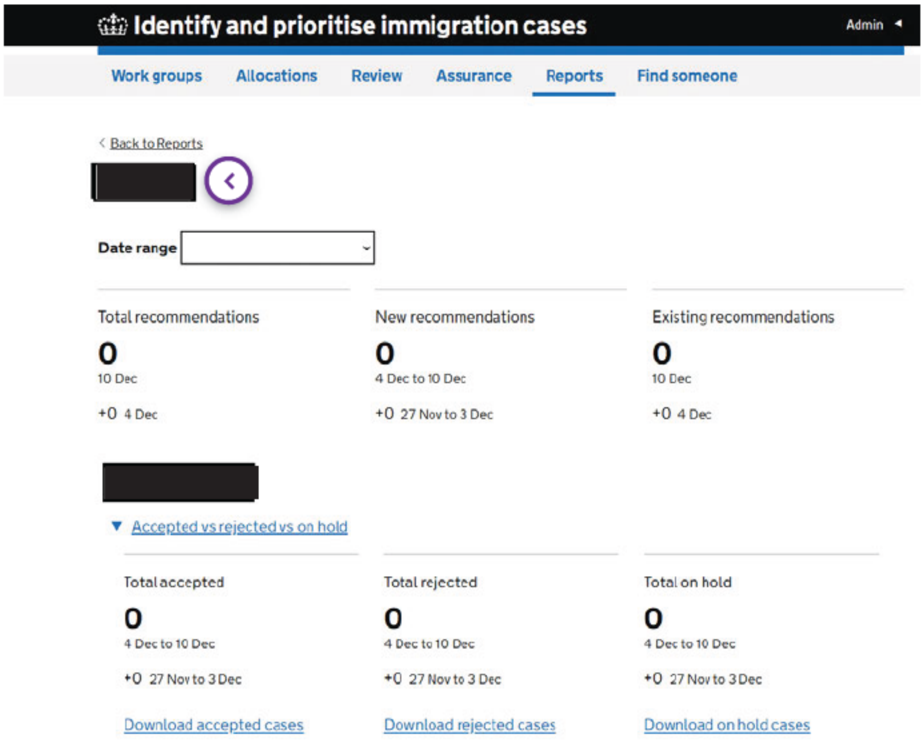
▼ Accepted vs rejected vs on hold

Total accepted	Total rejected	Total on hold
0	**0**	**0**
4 Dec to 10 Dec	4 Dec to 10 Dec	4 Dec to 10 Dec
+0 27 Nov to 3 Dec	+0 27 Nov to 3 Dec	+0 27 Nov to 3 Dec
Download accepted cases	Download rejected cases	Download on hold cases



Back

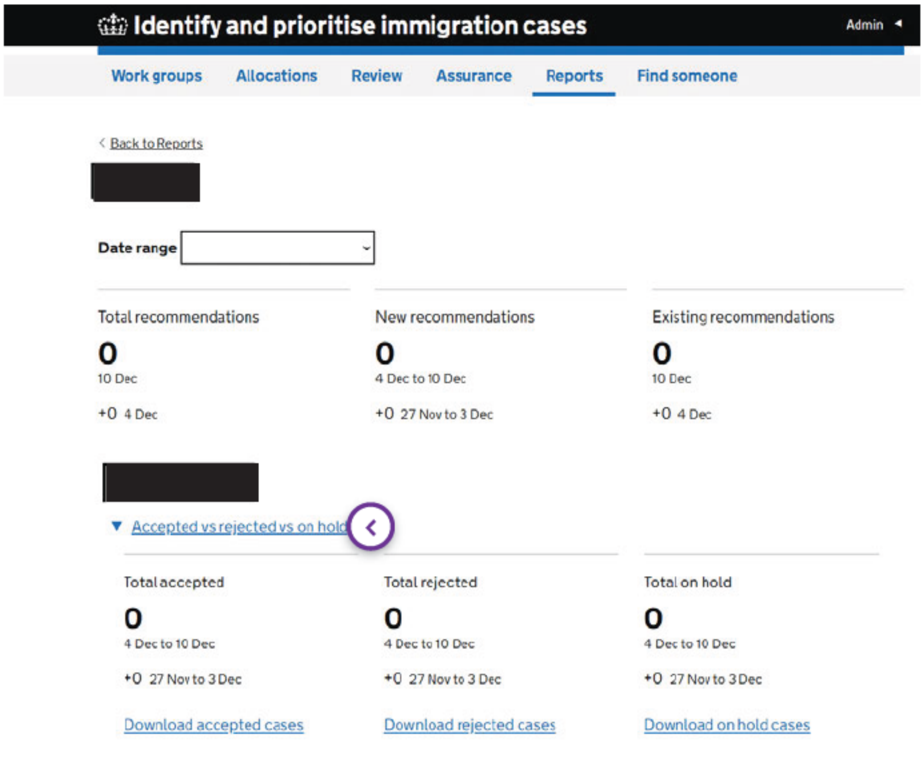
Select 'back to reports' to go back



[redacted] breakdown

Users will see the full breakdown of [redacted] here.

Total recommendations
New recommendations
Existing recommendations



Accepted vs rejected vs on hold

When 'accepted vs rejected vs on hold' is selected, the following will be displayed:

Total accepted
Total rejected
Total on hold

The trend information shows how many more or less recommendations there are based on the dates

The breakdown of activity undertaken on IPIC within the specified date range can be downloaded by selecting 'download **accepted** cases'