

CPIMS+ User Guide

March 2026

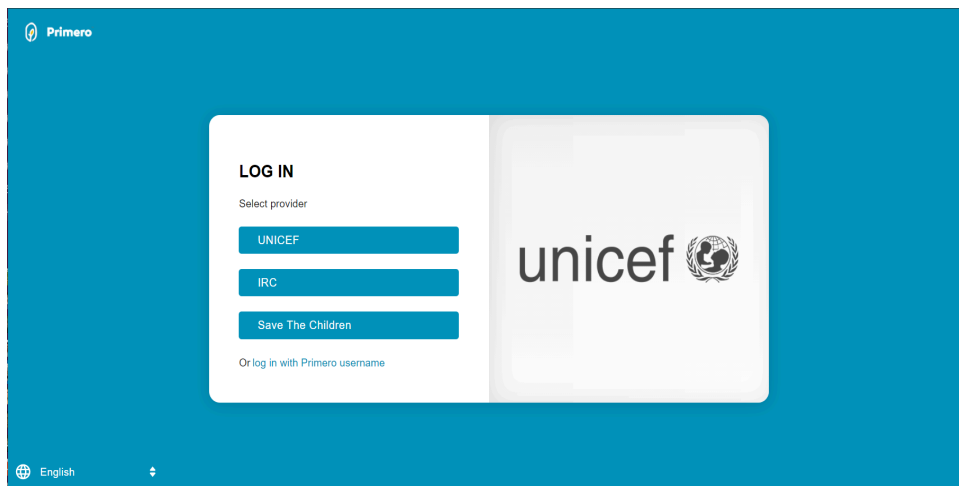
Introduction

The purpose of this user guide is to outline all features and functionality available in Primero. The forms built into Primero are configured to the in-country forms currently being used, and aligned to standard operating procedures currently in practice.

Logging In

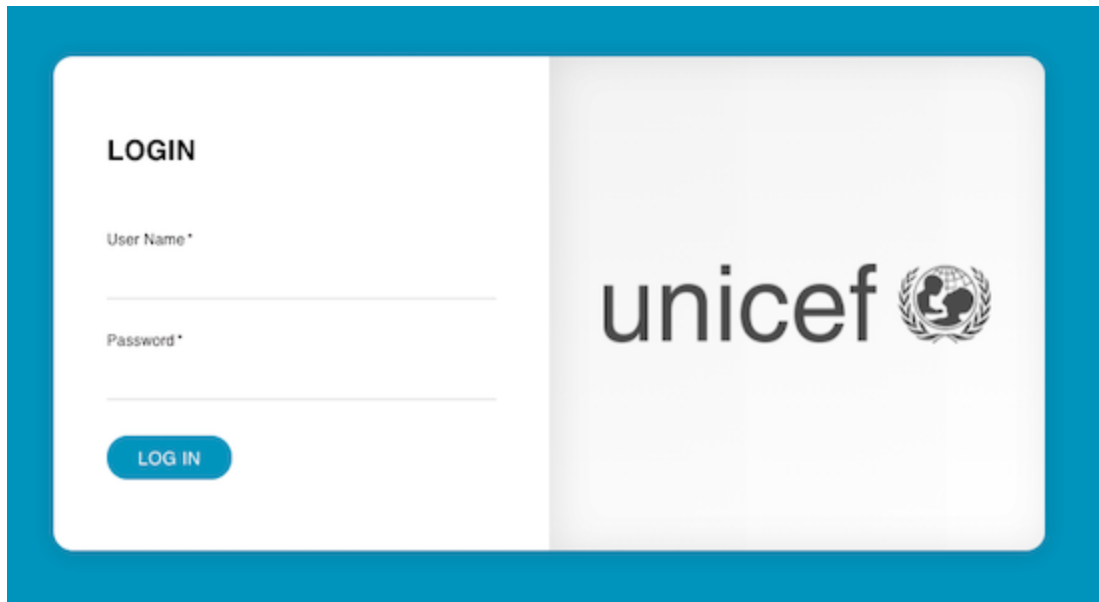
When logging into Primero, you'll see:

- 1) Participating organizations: If you see your organization listed, click on your organization to sign in through single-sign on as seen below



If you or any users are using single-sign on as shown above, and they close their Primero tab in their browser when they are offline, they will need to re-authenticate. Therefore, if Primero is being used in limited bandwidth areas, please do not close the browser once you have logged in.

- 2) "Primero" to log in: Please follow the instructions found here: <https://community.primero.org/t/resetting-primero-identity-user-password-in-primero-v2-and-reset-link-for-organizational-identity-provider/474>
- 3) User name and password: Click in the Username field and type in the unique user name provided to you by your System Administrator. Then enter your password in the field below and click **LOG IN**. If you have forgotten your password, you must contact the system administrator who will provide you with a temporary password.



Note that access to features and functionality varies depending on the user you are: Case Worker, or FTR manager.

The different types of users and their access vary depending on the implementation. Generally the roles are defined below:

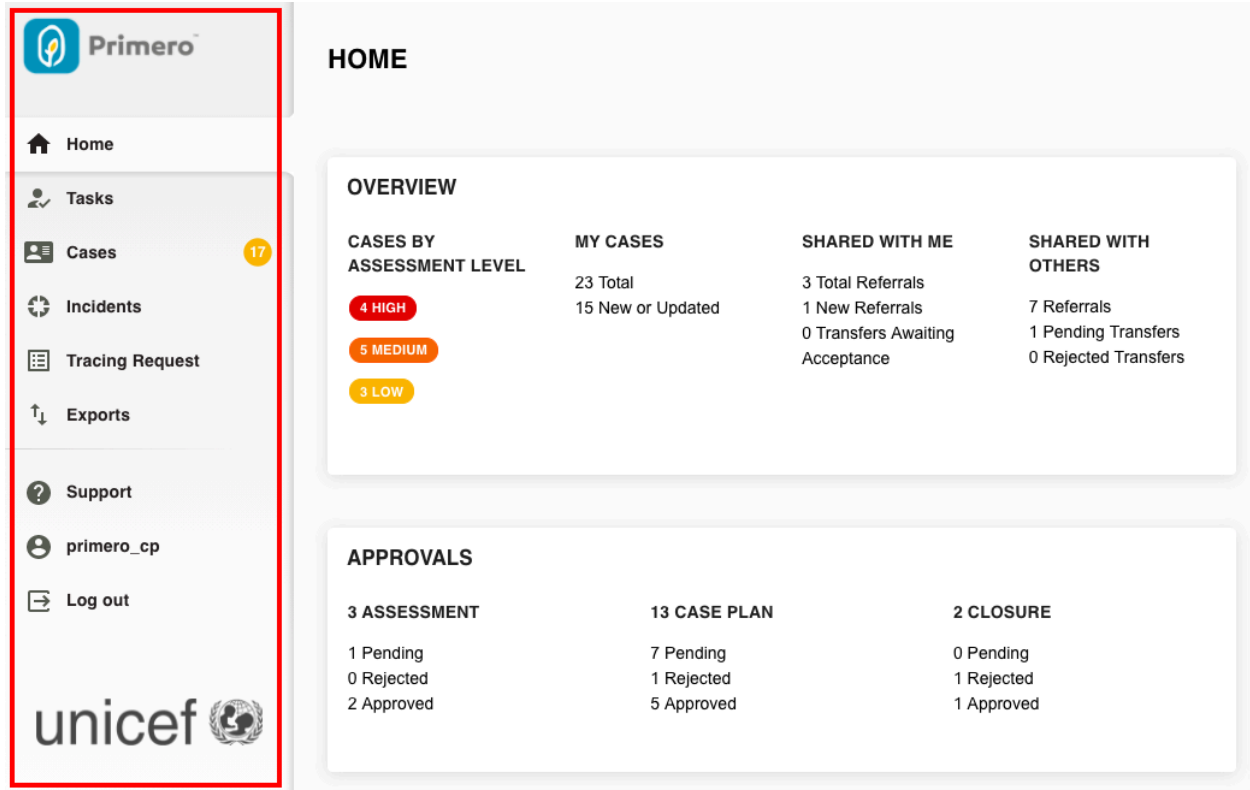
- Case Worker: create and edit only my own cases only
- Case Manager: view only the cases which are managed by case workers under their supervision

Navigating Primero

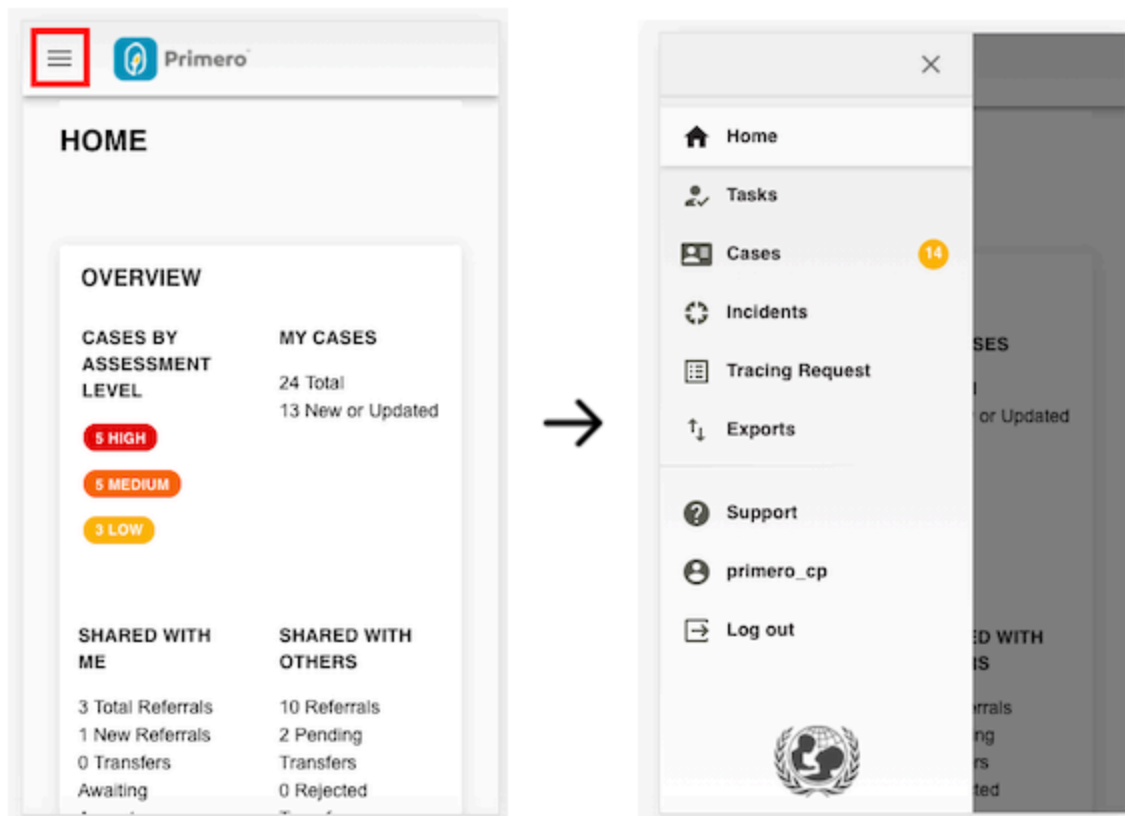
Navigation Menu

The Navigation Menu appears at the left side of your screen where you can quickly navigate to the options which are available to you in Primero. The type of information that appears here will depend on the type of work you do for your organization. For instance, social workers, managers, and agency administrators will each see cases which are tailored to their level of access as mentioned in the previous section.

You can access this menu from any page of the app.



On smaller devices, such as tablets or phones, you will need to click or tap on the menu button to show the Navigation Menu. The menu button will appear at the top left of your screen.



Dashboard

The Dashboard ("Home") is where you can quickly find information about the records you manage in Primero. The type of information that appears here will depend on the type of work you do for your organization. For instance, social workers, managers, and agency administrators will each see dashboards which are tailored to the needs of their day-to-day work.

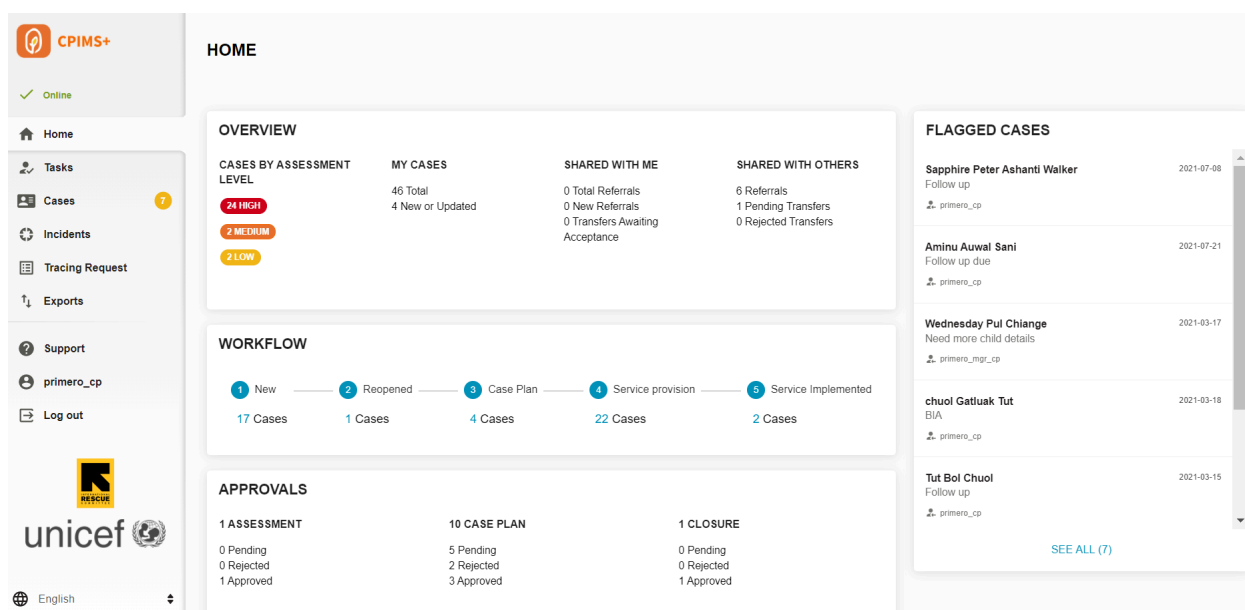
A few notes about dashboards:

- You can always get back to the dashboard by clicking on the "Home" link in the Navigation Menu.
- Clicking on any of the numbers in the dashboard sections below will take you to a list of the records which that number represents.
- In general, numbers in the dashboard represent records to which you have access. For example:
 - If you are a case worker, you have access to only your own cases, numbers in the dashboard will reflect only those cases which you manage directly, or which have been referred to you.

- o If you are a Case Manager and have access to all the cases managed by users in your team (user groups), the numbers in your dashboard will reflect these cases.
 - o Administrator dashboards generally reflect all records in the system.
- Dashboard numbers also tend to represent only open records. Unless the dashboard explicitly mentions closed records, assume that it represents only open ones.
- Dashboard numbers also exclude disabled¹ records
- If any updates are needed to your dashboards, reach out to your system administrator to change your permissions to improve your dashboards.

Case Worker Dashboards

The image below shows an example of the dashboard you might see as a case worker when you first login to Primero.



- **Action Needed** - This section tells you the most important information including:
 - o “New or Updated” - A case is included in this number if 1.) a supervisor has just assigned it to you; or 2.) another user in the system has added information to the case since the last time you saw it. This number will decrease if you view the case, make a change and save the case.
 - o “New Referrals” - shows you the number of cases which have been referred to you

¹ Disabling a case equivalent to deleting a case in the sense that it will no longer be visible for the case worker but remains in Primero for recording purposes.

- o “Transfers Awaiting Acceptance” - shows you the number of cases which have been transferred to you
- *Cases by Assessment Level* - This section tells you how many of your cases are at each "Risk Level"
- *My Cases* - This includes two indicators:
 - o "Total" - The total number of cases you manage
- *Shared with Others* - This shows you how many of your cases have been referred or transferred to someone else in the system. We will review referrals and transfers in a later section.
- *Approvals* - This tells you how many of your approval requests are pending, approved, or rejected by a case manager. Each type of approval appears with its own column.
- *Workflow - Individual Cases* - This tells you how many of your cases are at each stage of the case management workflow: New, Assessment, Case Plan, Service Provision, Service Implemented and Closed. Read more about the workflow stages in the *Workflow Status Bar* section below.
- *Flagged Cases* - This displays cases that you have flagged as a case worker (or case manager)

Case Manager Dashboards

Below are some examples of sections which may appear in your dashboard if you are a manager.


CPIMS+



Home

Cases 13

Tracing Request

Reports

Exports

Support

primero_mgr_cp

Settings

Log out




English

HOME

OVERVIEW

CASES BY ASSESSMENT LEVEL	MY GROUP'S CASES	SHARED WITH ME	SHARED WITH OTHERS
27 HIGH 3 MEDIUM 4 LOW	74 Open 3 Closed	0 Transfers Awaiting Acceptance	0 Referrals 0 Pending Transfers 0 Rejected Transfers

APPROVALS

PENDING APPROVALS

0 Assessment
 0 Closure
 9 Case Plan

SHARED FROM MY TEAM

CASE WORKER	REFERRALS	PENDING TRANSFERS	REJECTED TRANSFERS
primero_cp	6	1	0
byoal	1	0	0

- *Cases by Assessment Level* - See description above.
- *My Group's Cases* - This shows the total number of open and closed cases managed by all of the case workers in your team.
- *Shared with Me* - See description above. Note that, because the user in the example is not able to receive referrals, they only see information on the number of cases which other users have transferred to them, and which still have not been accepted. We will discuss referrals and transfers in a later section.
- *Shared with Others* - See description above.

Online

- Home
- Cases 13
- Tracing Request
- Reports
- Exports
- Support
- primero_mgr_cp
- Settings
- Log out

HOME

SHARED FROM MY TEAM

CASE WORKER	REFERRALS	PENDING TRANSFERS	REJECTED TRANSFERS
primero_cp	6	1	0
byoal	1	0	0
ssirat	1	0	0

SHARED WITH MY TEAM

CASE WORKER	REFERRALS	PENDING TRANSFERS
pdafonseca	1	0
salahsirrat	1	0
sotieno	1	0
ssirat	1	0
kcocco	0	1

- *Shared from My Team* - This is similar to the "Shared with Others" section, except that it shows how many of the cases managed by each of the case workers in your team have been transferred or referred to other users.
- *Shared with My Team* - This is similar to the "Shared with Me" section, except that it shows how many of the cases other users have referred or transferred to case workers in your team.

Online

- Home
- Cases 13
- Tracing Request
- Reports
- Exports
- Support
- primero_mgr_cp
- Settings
- Log out

HOME

OVERDUE TASKS

CASE WORKER	ASSESSMENT	CASE PLAN	SERVICES	FOLLOW UP
gjobit	0	0	0	0
byoal	1	0	0	0
cmabounji	1	0	0	0
megan.obrien	1	0	0	0
kristy.crabtree	2	0	0	0
kkaguthi	2	0	0	0
sa5	0	0	0	0
akante	1	0	0	0
pdafonseca	1	0	0	0
sa9	0	0	0	0
primero_cp	29	2	22	0
alessandra.dangelo	0	0	0	0
nkarania	0	0	0	0

- *Overdue Tasks* - This section shows all of your team as well as how many of your team's cases have tasks past their due dates. This is broken down by case worker and by the four types of tasks: Assessment, Case Plan, Service, and Follow Up.



CPIMS+

✓ Online

Home

Cases13

Tracing Request

Reports

Exports

Support

primero_mgr_cp

Settings

Log out

HOME

WORKFLOW - TEAMS CASES

	NEW	REOPENED	CASE PLAN	SERVICE PROVISION	SERVICE IMPLEMENTED	CLOSED
gjobit	1	0	0	0	0	0
byoal	0	0	1	0	0	0
cmasboungi	1	0	0	0	0	0
megan.obrien	1	0	0	0	0	0
kristy.crabtree	2	0	0	0	0	0
kkaguthi	2	0	0	0	0	0
sa5	1	0	0	0	0	0
akante	0	0	1	0	0	0
pdafonseca	1	0	0	0	0	0
sa9	1	0	0	0	0	0
primero_cp	17	1	4	22	2	3
alessandra.dangelo	1	0	0	0	0	0

- *Workflow - Team Cases* - For each case worker in your team, this section shows how many cases are at each stage of the case management workflow.

CP Administrator Dashboards

The below image gives an example of the sections you may see in your dashboard if you are an administrator.

CPIMS+

Online

Home

Cases

13

Incidents

Tracing Request

Reports

Exports

Support

primero

Settings

Log out

HOME

CASES

DISTRICT	OPEN CASES	NEW (LAST WEEK)	NEW (THIS WEEK)	CLOSED (LAST WEEK)	CLOSED (THIS WEEK)
Country 1::Province 1::District 1	11	0	0	0	0

PROTECTION CONCERNS

PROTECTION CONCERN	ALL CASES	OPEN CASES	NEW (THIS WEEK)	CLOSED (THIS WEEK)
Separated	21	20	0	0
Child labour (not worst forms)	3	3	0	0
Rape	2	1	0	0
Sexual exploitation	1	1	0	0
Unaccompanied	2	2	0	0
Emotional or psychological abuse / violence	4	4	0	0

- *Cases by Location* - This table shows the number of cases registered in each location. For each location, the table also shows:
 - o "Open Cases" - Total number of open cases registered in this location.

- o "New (Last Week)" - Cases registered in this location 7-14 days ago.
 - o "New (This Week)" - Cases registered in this location 0-7 days ago.
 - o "Closed (Last Week)" - Cases registered in this location which were closed 7-14 days ago.
 - o "Closed (This Week)" - Cases registered in this location which were closed 0-7 days ago.
- *Cases by Protection Concern* - Shows the number of cases with each type of protection concern, broken down by:
 - o "All Cases" - This includes both open and closed cases.
 - o "Open Cases" - This includes only cases which are still open.
 - o "New (This Week)" - Open cases registered 0-7 days ago.
 - o "Closed (This Week)" - Cases which were closed 0-7 days ago.
- *Cases to Assign* - Shows the number of cases that have been assigned to a manager that need to be reassigned to a case worker. Note: role must have "Manager?" selected for this dashboard to display on the Home page.

Cases To Assign

	HIGH	MEDIUM	LOW	NO PRIORITY
Cases To Assign	0	0	0	1
Overdue Cases To Assign	0	0	0	0

Tasks List

As a Case Worker, if you click on the "Tasks" link in the Navigation Menu, you will arrive at the **Tasks** page.

 Online Home Tasks Cases Incidents Tracing Request Exports Support primero_cp Log out		TASKS			
ID#	NAME	PRIORITY LEVEL	TYPE OF ACTION	DUE DATE	STATUS ↑
6872bab	Chiang Tut Paul	NO ACTION	Assessment	20-Mar-2021	ⓘ
6add657	Nyuon Chuol Makuach	NO ACTION	Assessment	20-Mar-2021	ⓘ
6f11a63	Selam Bacha Kebede	HIGH	Assessment	19-Mar-2021	ⓘ
1fb50d7	Animut Desalegn Wassie	HIGH	Service - Basic psychosocial care	18-Mar-2021	ⓘ
6f11a63	Selam Bacha Kebede	HIGH	Service - Medical	15-Mar-2021	ⓘ
2389276	Shakura Rubab Taj	HIGH	Assessment	07-Mar-2021	ⓘ
c9f9b0b	Tut Bol Chuol	LOW	Assessment	04-Mar-2021	ⓘ
4ba49e9	Nafisa Dror Iqbal	HIGH	Assessment	21-Feb-2021	ⓘ
9670e59	Hamed Tasnim Shadya	HIGH	Assessment	15-Feb-2021	ⓘ

Here, you will see the incomplete Tasks present for all of the cases you manage. Primero automatically generates Tasks for four types of actions: assessments, case plans, services, and follow ups. For each Task, the list shows:

- Case ID
- Name of the Case
- Priority Level (also called "Risk Level")
- Type of Action
- Due Date
- Status (either "Overdue" or "Almost due")

Primero automatically generates Tasks based on information you fill out in the Case forms. Each type of Task action has a date field in the Case forms that acts as its due date. As soon as a user enters a date value into one of these fields, Primero generates a Task with that due date. To find out which field sets the due date for a Task, hover over the due date for any Task you find in the Tasks page.

KDMA/04/20/86f164e	wilomena ostenhocks dreihauer	MEDIUM	Service - Psychosocial Service	03-Jul-2020	ⓘ
ccfa3b8	Harold Marcus	LOW	Case Plan	04-Jul-2020	ⓘ
75567b8	Bob G Miller	HIGH	Service - Psychosocial Service	01-Sep-2020	ⓘ
75567b8	Bob G Miller	HIGH	Service - Health/Medical Service	04-Sep-2020	ⓘ

Each type of Task action also has a date field in the Case forms which marks the Task as "complete". Once a user enters a date value into this field, the Task is marked as "complete" and disappears from the Tasks list.

To complete a Task, click on that Task in the list. You will arrive at that Task's Case, on the form which corresponds to that Task and contains its "complete" field. (Note: Usually the "complete" field for a Task will have help text which is assistive text under a field to let you know it is used to complete a Task.) For example, if I click on a Case Plan

Task, I will arrive at the Case Plan form for that Case. This form contains the field "Case Plan Initiated". If I fill out this field, the Task will be completed and will disappear from the Tasks list.

CASE ID: UNICEF-1389A44

NEW ASSESSMENT CASE PLAN SERVICE PROVISION SERVICE IMPLEMENTED CLOSED

Record Information

Identification / Registration

Initial Screening Assessment

Comprehensive Assessment

Social Enquiry Report

Case Plan

CASE PLAN

Approval Status

Approved

Case Plan Developed and Participants Involved

Date Case Plan Initiated

30-Mar-2020

Tasks. Below is a list of the fields used for each type of Task action in the Primero configuration. **Note:** only record owners can see tasks for their cases. You will not see the tasks if you are assigned to a case (such as a referral).

- Assessment
 - o Due Date: "Date Assessment Due" on the "Child's Details" form

Record Information

Consent and Assent

Identification / Registration

Interview Details

Child's Details

Care Arrangements

CHILD'S DETAILS

Date Case Identified / Reported

31-Jan-2021

dd-mmm-yyyy

Date Assessment Due

08-Jun-2020

dd-mmm-yyyy

- o Complete: "Date Assessment started/requested on" on the "Assessment Status" form.

Record Information ^
Consent and Assent
Identification / Registration ^
Assessment v
Assessment Status
Protection Concerns
Assessment
Summary and Conclusions
BID Status
BID Report
Case Plan
Case Conference Details
Services / Follow Up ^
Case Review

ASSESSMENT STATUS

Approved by Manager

☐ Yes

Date

dd-mmm-yyyy

Manager Comments

Approval Status

ASSESSMENT FORM

Assessment start date

09-Jun-2020

This field is used for the Workflow status.

- Case Plan
 - o Due Date: "Date Case Plan Due" on the "Assessment Status" form.

ASSESSMENT FORM

Assessment start date

09-Jun-2020

This field is used for the Workflow status.

Assessment completed on

dd-mmm-yyyy

Date Case Plan Due

02-Sep-2020

dd-mmm-yyyy

[Guidance](#)

- o Complete: "Date Case Plan Initiated" on the "Case Plan" form.

Case Plan

Date Case Plan Initiated
03-Sep-2020

This field is used for the Workflow status

Date Case Plan Agreed

dd-mmm-yyyy

- Service:
 - o Due Date: "Implementation Timeframe" on the "Services" subform.
 - NOTE: Each Service subform entry will generate its own Task.
 - NOTE: "Implementation Timeframe" is a dropdown, not a date field. In some configurations, the "Service Appointment Date" field is used to set the Task due date instead.
 - o Complete: "Service Implemented On"

SERVICES

Type of Response
Service provision

Type of Service
Psychosocial Service

Created on
03-Oct-2020 01:18

dd-mmm-yyyy

Implementation Timeframe
(Select...)

- One hour
- Three hours
- One day
- Three days

dd-mmm-yyyy

✓ ADD X CANCEL

- Follow Up:
 - Due Date: "Follow up needed by" on the Follow Up subform.
 - NOTE: Each Follow Up subform entry will generate its own Task.
 - Complete: "Follow Up Date" on the Follow Up subform.

FOLLOW UP

Type of follow up
Follow up for Service

Type of service
Psychosocial Service

Type of assessment
Personal Intervention Assessment

Follow up needed by
10-Oct-2020

Follow up date

Was the child/adult seen during the visit?

☐ Yes ☐ No

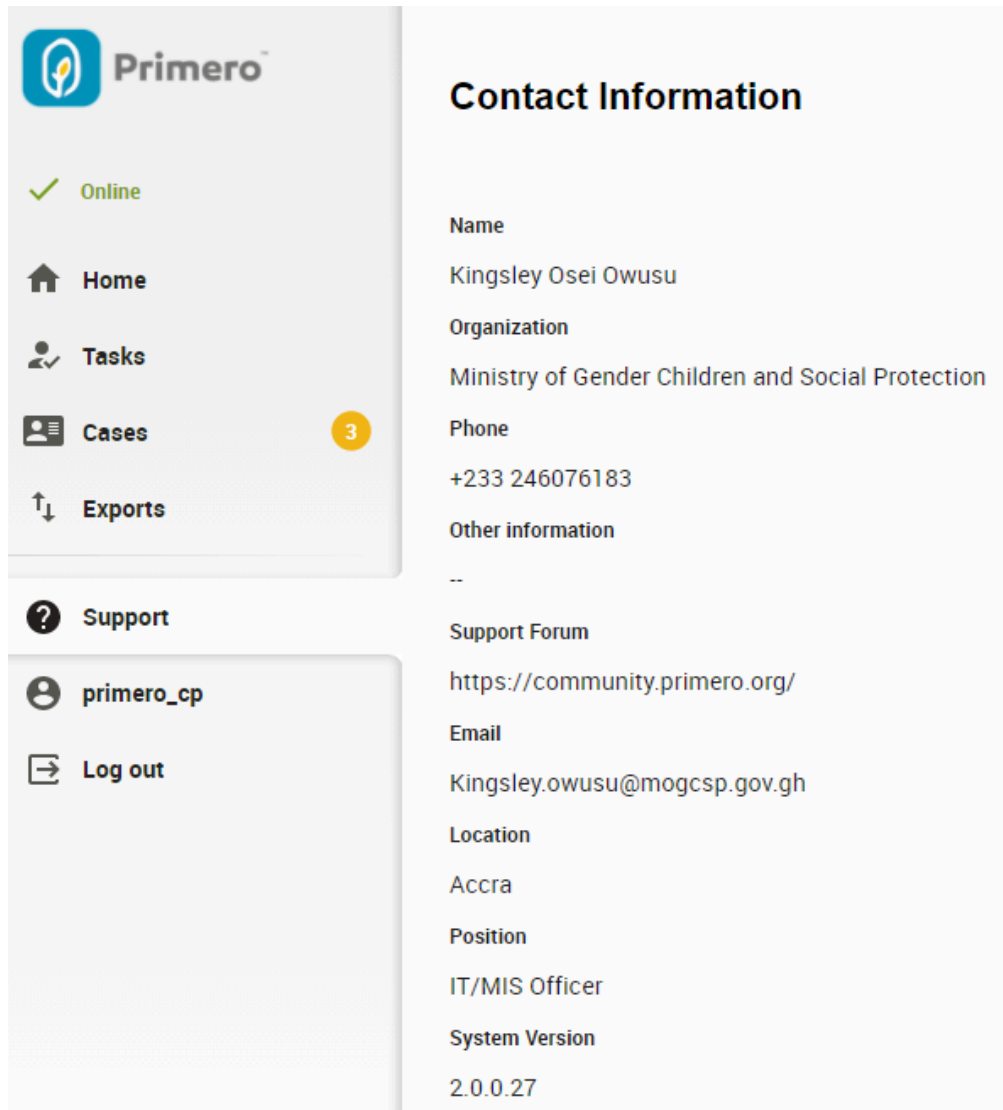
Record Lists

There are three main types of records in Primero: **Cases**, **Incidents**, and **Tracing Requests**. In the Navigation Menu, below the Tasks link are the links to the List pages for each type of record. These are the **Case List**, the **Incident List**, and the **Tracing Request List**. Depending on the work you do for your organization, you may only have access to one or two of these pages. For instance, in most Child Protection contexts case workers only deal with Cases, and so only have access to the Case List. For this reason, we usually use the Case List as an example when discussing record list functionality.

For more information on how record lists work, please see the [Navigating Record Lists](#) section.

Support

In the Navigation Menu, below the Exports link, you should see the **Support** link. Clicking on this will bring you to page with contact information for your system administrator, as well as links to support forums and documentation.



The screenshot displays the Primero user interface. On the left is a navigation menu with the Primero logo at the top. Below the logo, it shows a status 'Online' with a green checkmark. The menu items are: Home (house icon), Tasks (person with checkmark icon), Cases (person with document icon, highlighted with a yellow circle containing the number 3), Exports (up and down arrows icon), Support (question mark icon), a user profile link for 'primero_cp' (person icon), and a 'Log out' link (door icon). The main content area on the right is titled 'Contact Information'. It lists the following details: Name (Kingsley Osei Owusu), Organization (Ministry of Gender Children and Social Protection), Phone (+233 246076183), Other information (indicated by two dashes), Support Forum (https://community.primerio.org/), Email (Kingsley.owusu@mogcsp.gov.gh), Location (Accra), Position (IT/MIS Officer), and System Version (2.0.0.27).

Contact Information	
Name	Kingsley Osei Owusu
Organization	Ministry of Gender Children and Social Protection
Phone	+233 246076183
Other information	--
Support Forum	https://community.primerio.org/
Email	Kingsley.owusu@mogcsp.gov.gh
Location	Accra
Position	IT/MIS Officer
System Version	2.0.0.27

My Account and Password Change

In the Navigation Menu, below the Support link, you will see a link with your username. Click this to go to the **My Account** page.

CP WORKER EDIT

Full Name *
CP Worker

Username *
primero_cp

User Code
111-222

Locale
English

Services

If you do not specify services, this User will be given the same services its Agency has.

Phone
111-2222-333-444444

Email *
primero_cp@primero.com

Here, you can see details about your user account. Click the Edit button at the top right of the page to update any of these details or to change your password.

CP WORKER EDIT

Full Name *
CP Worker

Username *
primero_cp

User Code
111-222

Locale
English

Services

If you do not specify services, this User will be given the same services its Agency has.

Phone
111-2222-333-444444

Email *
primero_cp@primero.com

Here, you will be able to update the following:

- **Full Name:** The name managers and administrators will see when looking at your account.
- **User Code:** User codes are used in the system-generated CPIMS+ ID and will only appear if your CPIMS+ has been customized to show your user code on records that you create

- **Password:** Must be at least eight characters and contain both letters and numbers.
 - To update your password, please click the "Change Password" link. Otherwise, your password will stay the same.
 - If you forget your password, contact the system administrator to provide you with a temporary password.
- **Language:** This will be the default language in which you will see the application.
- **Phone:** Allows other users, such as managers or administrators, with the ability to view your profile to contact you.
- **Email:** Will be used for any email notifications to be able to accept or reject transfers. It is required that all users have a functional email address to ensure they are able to receive email notifications from Primero and email notifications are enabled.
- **Services:** Any services you will be providing through Primero. This will determine whether and when you appear as a potential recipient for record referrals.
- **Position:** Your official title within your organization.
- **Current Location:** The location where you are always or most-often based. This will determine whether and when you appear as a potential recipient for record referrals and transfers.
- **Receive push notifications:** This should be enabled on case workers mobile phones or tablets if they would like push notifications to appear on their device if they would like a notification when:
 - A case is assigned to them
 - A case is transferred to them
 - A case is referred to them
 - When a supervisor approves a form
 - Someone sends a transfer request for your case
 - As a supervisor, a push notification will appear if a case worker requests approval on a form

Note: the Primero must be installed as a PWA on your device. In order to do this, you must go to your profile, edit the user account to set it to receive push notifications as well as use the toggle at the top of my account page to turn on notifications for your current device (see screenshot below)



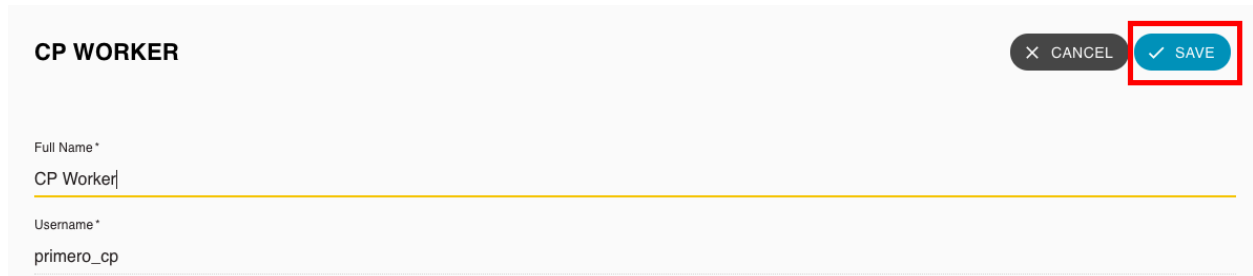
Device notifications



You can view how push notifications work in this demo video:

<https://youtu.be/62Wiz2aUpRk?si=VYynXJsVhhAOdugi>

- **Receive email notifications:** This should be enabled to ensure case workers are able to you receive email notifications, including the following:
 - Cases assigned, transferred, or referred.
 - Requests from other users for you to transfer one of your cases to them.
 - Manager approvals and requests for manager approval.

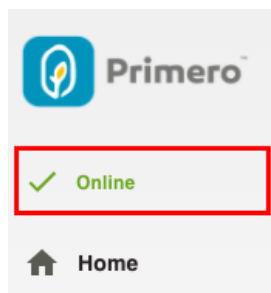


Click the **SAVE** button once you are finished making changes.

Offline Mode

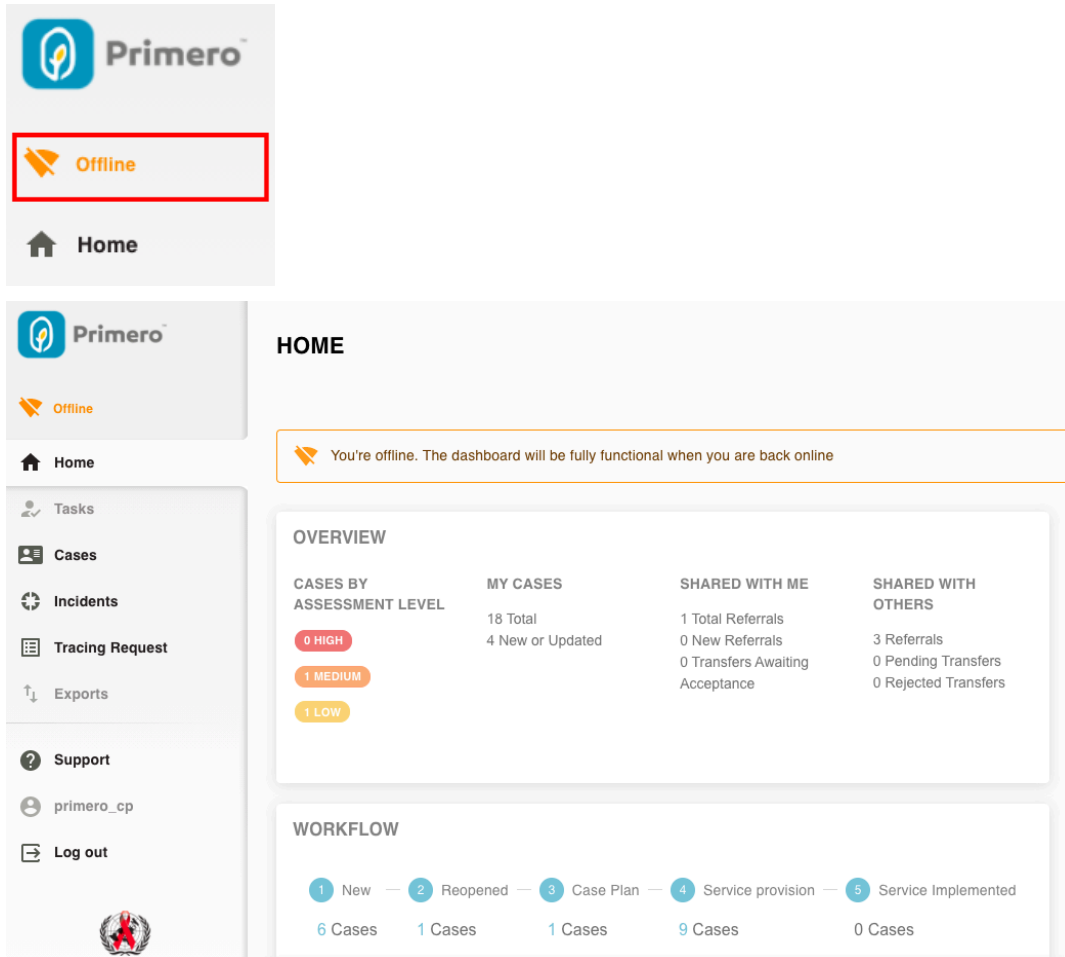
Online Mode:

When you have internet connection, you will see the “Online Mode” symbol at the top of the Navigation Menu. This means that Primero has full functionality.



Offline Mode:

If you lose your internet connection or choose to work offline, you will be in “Offline Mode,” as indicated in the images below.



When you are in Offline Mode, you will have limited functionality.

1. You will be able to create and save new cases, but your changes will not be submitted until you are back online.
2. You can “Mark for offline” cases to be able access and edit records to the device you are using. You can do this by selecting the cases you would like to work on while offline, and select “Mark for Offline” in the actions menu:

Cases

20 case(s) selected [Select all 2845 cases that match this query.](#) Rows per page 20 1-20 of 2845

	ID#	NAME	AGE	SEX	REGISTRATION DATE	CASE OPEN DATE	SOCIAL WORKER	PHOTO
☒	136924c	cpasettransfer asdasdasd	6	Male	19-May-2022	19-May-2022 10:52	primero_cp	
☒	11387e5	qatransfer sadasdasd	4	Male	19-May-2022	19-May-2022 10:38	primero_cp	

Filters:

- Assign Case
- Add Incident
- Add Service Provision
- Mark for Offline
- Export

- Once you have marked cases for offline editing, those will be available while offline:

The screenshot shows the Primero application interface in Offline Mode. The sidebar on the left contains navigation links: Home, Tasks, Cases, Incidents, Tracing Request, Exports, Support, and Log out. The main content area is titled 'CASES' and shows a table of cases. The table has columns for ID#, NAME, AGE, SEX, REGISTRATION DATE, and PHOTO. Three cases are highlighted with yellow dots, indicating they are available for offline editing: Maxwell middle Harris (ID# c505a73), Robin G Tesland (ID# 46b0363), and Angelica Tellers (ID# 0943ebb). The right sidebar shows filters for Age Range, Sex, Case Plan, Risk Level, No Activity, and Status. The Status filter is set to 'Open'.

ID#	NAME	AGE	SEX	REGISTRATION DATE	PHOTO
94c3630	Harriet Orange Ipswich	14	Female	19-Nov-2020	
f6499e6	Tiffany Davis	15	Female	17-Nov-2020	
c505a73	Maxwell middle Harris	2	Male	07-Jan-2021	
617166d	Antonia Danyelescu	8	Female	18-Nov-2020	
b19ae78	Gilda Baumgarten	11	Female	18-Nov-2020	
325cbd3	Hans Hohenzolern	17	Male	24-Nov-2020	
c3a3059	Veronica Maria Rodriguez	17	Female	24-Nov-2020	
46b0363	Robin G Tesland	14	Female	19-Nov-2020	
0943ebb	Angelica Tellers	15	Female	03-Dec-2020	
2a4eb10	Murray Hewitt	12	Male	17-Nov-2020	

For example, in the image above, the cases you were working on before you lost connectivity (ie. Maxwell, Robin, and Angelica) are still accessible from the Case List. All the other cases are greyed out and inaccessible until you are back in Online Mode.

This means that if you are planning to go into Offline Mode, you should “Mark for Offline” any Cases you will want to edit or access *while still online*.

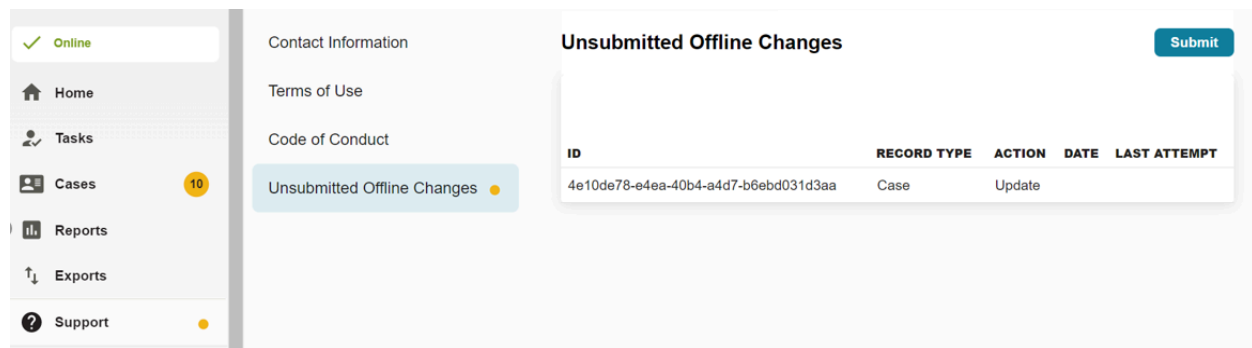
- Only certain actions will be available in Offline Mode (such as requesting approvals or deleting uploads). Note that these actions will only get submitted to the system once you are back online.
- Some pages, such as Tasks and Exports, are unavailable in Offline Mode.
- While offline, the case list displays all cases including closed, disabled, transferred and duplicate cases but when online it defaults to only open cases.

IMPORTANT: Note that if you choose to log out while in Offline Mode, you will not be able to log back in until you are online again. Additionally, if you log out, any changes you made while offline will be lost. There is unfortunately no easy technical solution for logging in while completely offline in Primero v2. PWA's are a relatively new technology. In order to log in while offline, we would require storing user credentials in your browser which is unsafe and is a security risk.

NOTE: If you are using a VPN, or if your organization has provisioned your device with advanced security settings, you may not be able to use Offline Mode. Before attempting to use Primero in a low-connectivity setting, try using Primero at home or in your office, and switch on your device's "Airplane Mode," which cuts your device's internet connection. If you do not see the "Offline" notification appear in Primero, then Offline Mode may not work on your device. This means information you enter while you are offline will not be saved. If you are unable to use Offline Mode, please talk to your organization's ICT team about how to update your device's settings.

Unsubmitted Offline Changes

In the support page, there is a new tab called "Unsubmitted Offline Changes" which looks like this:



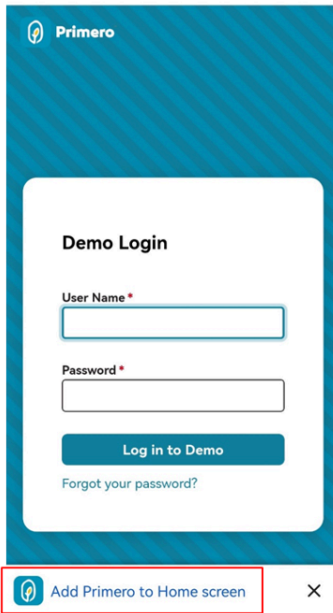
When users are offline, and if they go online and any cases fail to sync in the backend of the system, users can try to re-submit any of the unsynced records here by clicking "Submit". When the user clicks on submit, Primero attempts to submit the changes again. This is useful for those users who have intermittent internet access.

Note: We had reports from some colleagues who were not able to log in to their Phone A52 Samsung or Galaxy Tab A7 lite. For 1 user who *can* log in on a mobile device, ask them to check the settings and see if the date and time set automatically (to adjust to the time zone) or manually. Depending on the answer, update the settings on the mobile device to be either automatically or manually set and then re-try logging in.

Saving Primero to your Home Screen (Android):

Option 1:

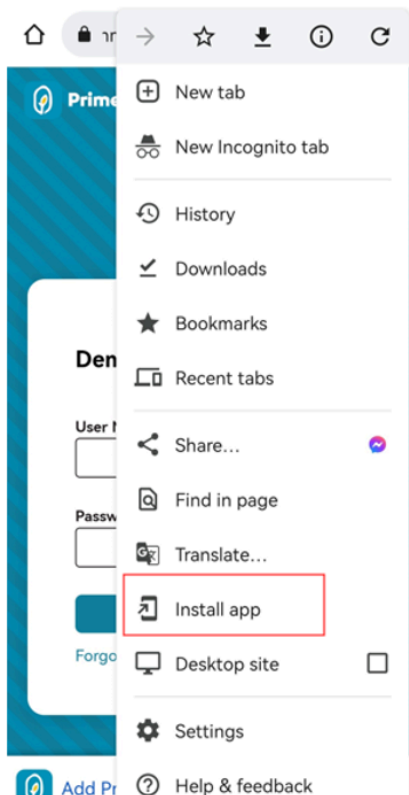
1. Open Google Chrome on your mobile device.
2. Type in the Primero URL – xyz.primero.org
3. You will see ' **Add Primero to Home Screen** ' at the bottom. Select it.

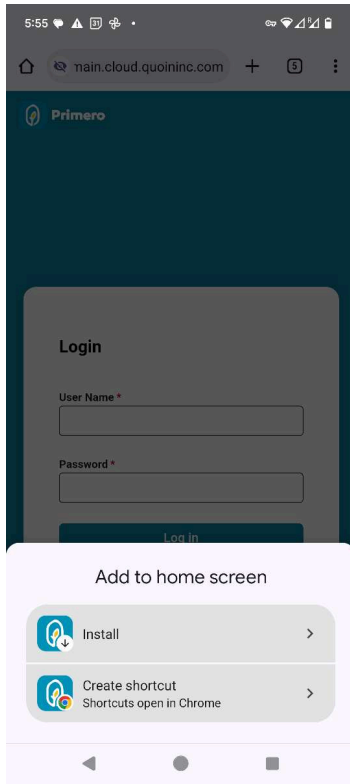


4. You will have Primero now saved on your home screen

Option 2:

1. Open Google Chrome on your mobile device.
2. Select the 3 dots  in the upper right.
3. Select 'Install app':





4. You can either install the app or create a shortcut. Once selected, you will have Primero now saved on your home screen.

Saving Primero to your Home Screen (iPhone):

1. On your iPhone browser, go to the Primero site.

AT&T Wi-Fi 12:52 PM 64%

Login

User Name*

Password*

Log in

[Forgot your password?](#)

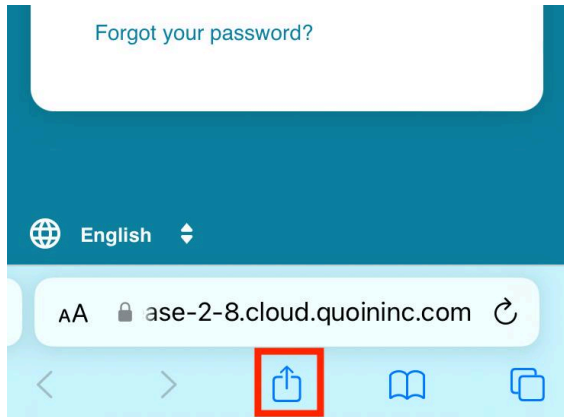
English

ase-2-8.cloud.quoininc.com

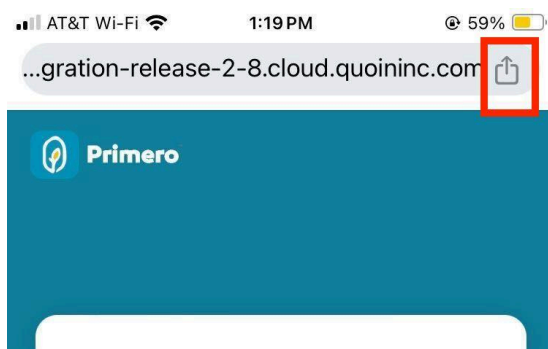
< > Share Bookmarks

2. At the bottom of the screen, select the Share icon.

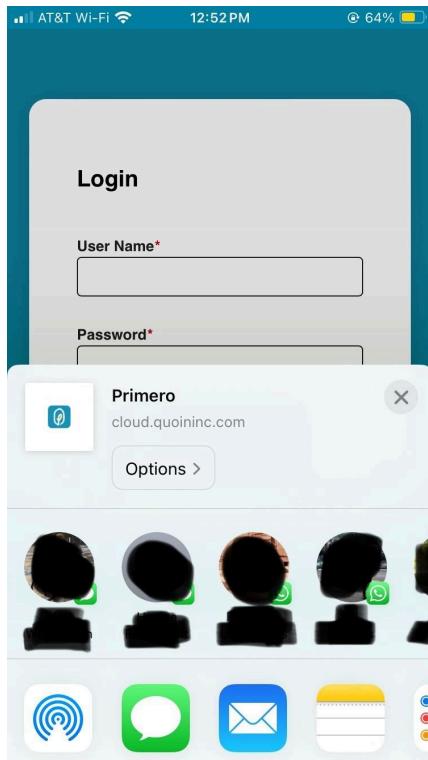
In Safari, the Share icon is found at the bottom of the screen.



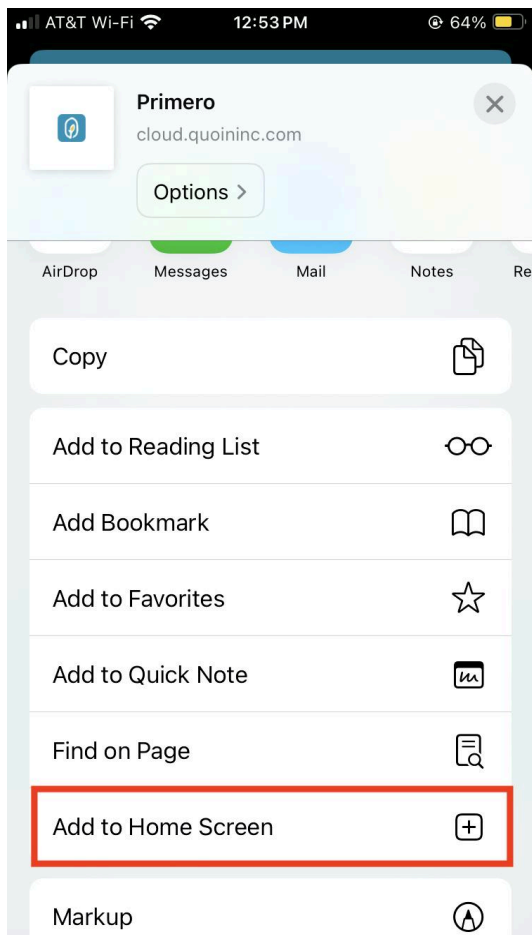
In Chrome, the Share icon is at the top of the screen.



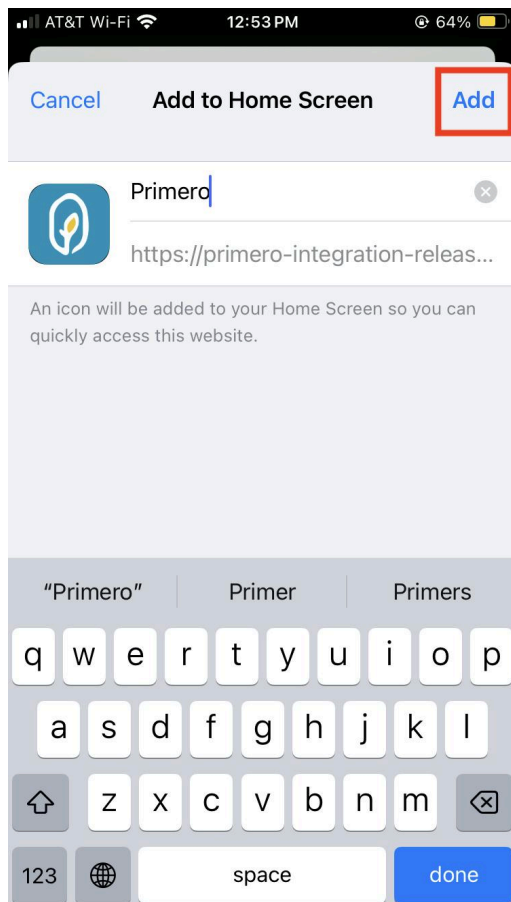
3. Selecting the Share icon will open a slider with Sharing options.



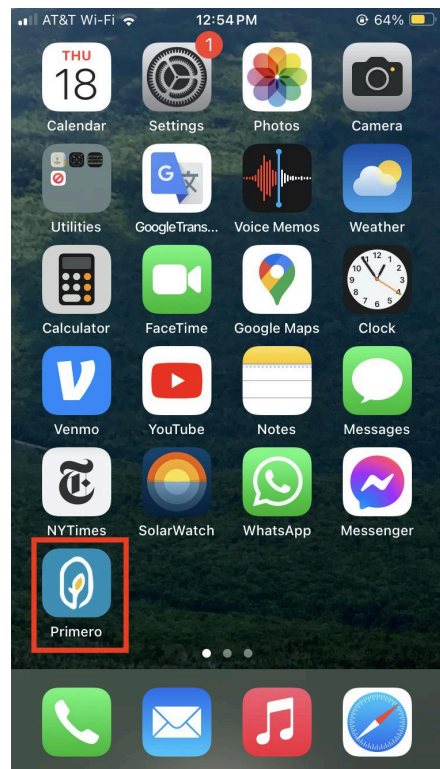
4. Scroll down in the Sharing menu until you see an option called “Add to Home Screen.”



5. Select “Add to Home Screen” and then choose “Add.”



6. You should see the Primero app on your iPhone's home screen.



7. Proceed to log-in as usual.

AT&T Wi-Fi 12:54 PM 64%

 **Primer**

Login

User Name*

Password*

Log in

[Forgot your password?](#)

 English

AT&T Wi-Fi 12:56 PM 64%

  **CPIMS+**  **Online**

Home

Overview

CASES BY ASSESSMENT LEVEL

0 HIGH
0 MEDIUM
0 LOW

MY CASES

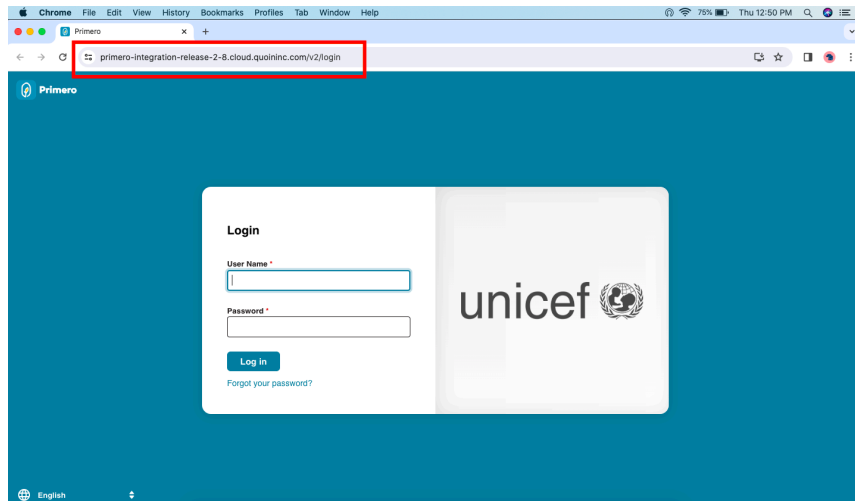
- 0 Total
- 0 New or Updated
- 0 With Incidents
- 0 With New Incidents
- 0 Without Incidents

MY CASES

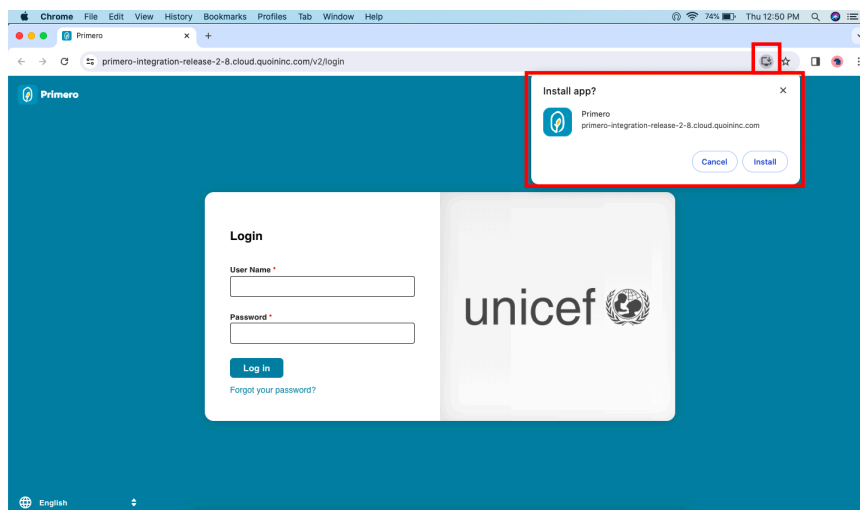
- 0 Total

Saving Primero to your Home Screen (Mac):

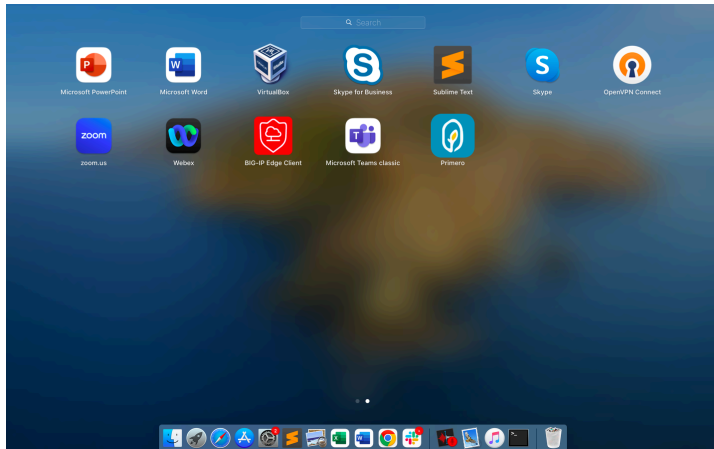
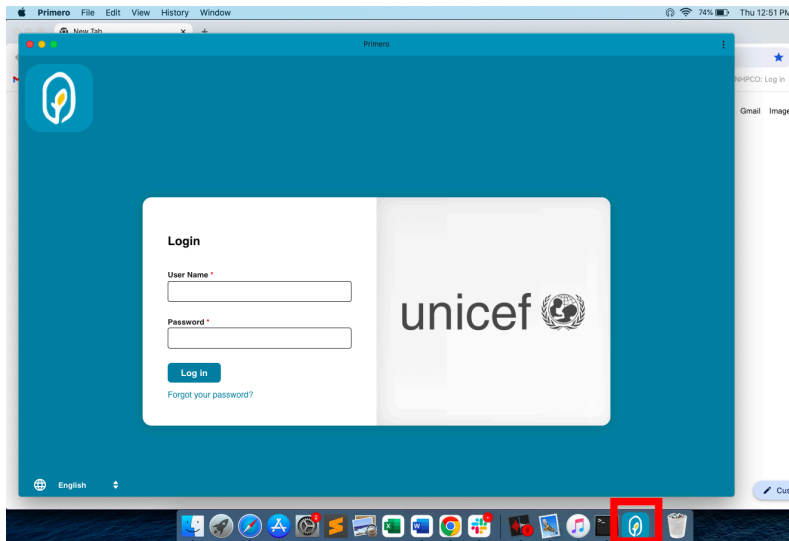
1. On your desktop browser, go to the Primero site.



2. Select the Download link in the top right of the browser url, and click “Install.”

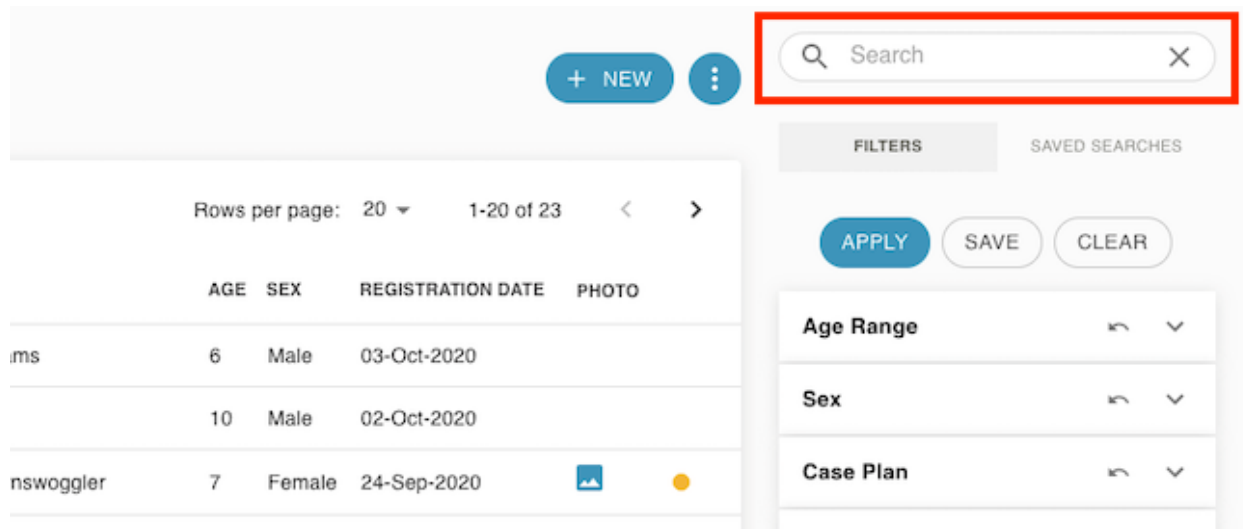


3. This will create a desktop app for Primero, visible at the bottom of the screen or from Applications. Proceed to log-in as usual.



Navigating Record Lists

Searching for Records



On all of the record list pages, you will find a search bar at the top right of the page. When you perform a search, Primero compares your query against the following fields for each record type:

- **Cases:** "Long ID," "Case ID," "Name," "Nickname," "Other Name," "National ID Number," and "Number of Other ID Document,".
- **Incidents:** "Long ID," "Incident Code," "Account of Incident," "Survivor Code", and "Incident ID IR."
- **Tracing Requests:** "Long ID," "Inquirer ID," "Name of inquirer," and "Nickname of inquirer."

By default, search includes both open and closed cases. You can search and filter the record lists at the same time (example: Search for Cases with the name "Smith" while filtering for only Male Cases with a Risk Level of "High").

Primero's search uses phonetic matching to include results which have the *same sound* as your search term. For instance, if you search for 'John,' the result 'Jon Doe' will appear, even though the first name 'Jon' is not spelled with an 'h' like in your search term. While this method gives the user flexibility if they do not know exactly how to spell a name, it does come with limitations. For instance, if you search for 'John Doe,' and a child's full name is 'Jon Amos Doe,' it will not appear in your search results. This is because Primero is searching for a name which contains the words / sounds you typed, *in order*. Basically, when Primero compares 'John Doe' to 'Jon Amos Doe,' it first determines that the sound 'John' matches the sound 'Jon,' but then decides that the sound 'Doe' does not match the sound 'Amos,' and so excludes this child from the search results. While this may seem limiting, it prevents Primero's search from including irrelevant results. So, if you search using full name, and the Case you are seeking does not appear, try searching for the first, middle, and/or last name instead.

If a case worker searches “John” OR “Doe”, the case list will return names such as “John Jack” or “Jane Doe”.

If you are searching “Akiel Pilgrim”, the results will also include names with similar letters (a, i, l, k, r) such as “Adarius Balkaran”.

Note: If you select the “back” button in the browser, the results of the search will be cleared.

Searching by Phone Number where case workers and managers can enter a phone number and it will return the associated cases if the telephone number exists on the case. Specifically, if the telephone number is on the following forms:

- Case
 - Nested Incident Details Subform
 - cp_incident_perpetrator_mobile_phone
 - cp_incident_perpetrator_phone
 - Child’s Details + Referral Details
 - telephone_current
 - Care Arrangements
 - telephone_child_future
 - Nested Care Arrangements
 - telephone_caregiver
 - telephone_caregiver_future
 - telephone_last
 - Other Identity Details
 - telephone_last
 - Nested Child’s Preferences
 - wishes_telephone
 - Nested Verification
 - verification_phone_inquirer
- Incident
 - NOTE: There are currently no phone fields on incidents.
- Tracing Request
 - relation_telephone
 - telephone_last
- Registry
 - telephone_current
- Family Record
 - family_telephone_current

Searching for Cases Managed By Other Users

Some users have the ability to search for and view limited information about records managed by other users. When users with this ability perform a search and arrive at the

Search Results page, they may see Cases for which they have full access (for example, a Case they manage) as well as Cases for which they *do not* have full access (for example, a Case managed by another user at another organization or district).

ID#	NAME	AGE	SEX	REGISTRATION DATE	PHOTO
75567b8	Bob G Miller	13	Male	01-Sep-2020	
935b199	Bobby Fisher	8	Male	28-Aug-2020	
80f5fa3	bob smith	3	Male	07-Aug-2020	
KDMA/04/20/c0adb45	bobby c mcgee	16	Male	30-Apr-2020	

When the user clicks on a Case in the Search Results page...

- If they have full access, they arrive at the View Case page.
- If they *do not* have full access, the **View Details** modal appears.

The View Details Modal

The **View Details** modal displays a small set of fields about a Case. This allows you to see some limited information about a Case managed by another user, without endangering the data confidentiality of the Case.

You can see a button labelled **Request Transfer** at the bottom of this modal. For more information on this action, please see the Requesting a Case Transfer section.

NOTE: Depending on the system's configuration, you may also be able to see the Case's photo in this modal.

ID #5C746C4 ×

Case Worker Code	Agency
l_kona_unicef	--

Full Name

Osman Hawa Fatima

Sex	Date of Birth	Age	Estimated Age?
female	2008-01-01	12	

✓ REQUEST TRANSFER

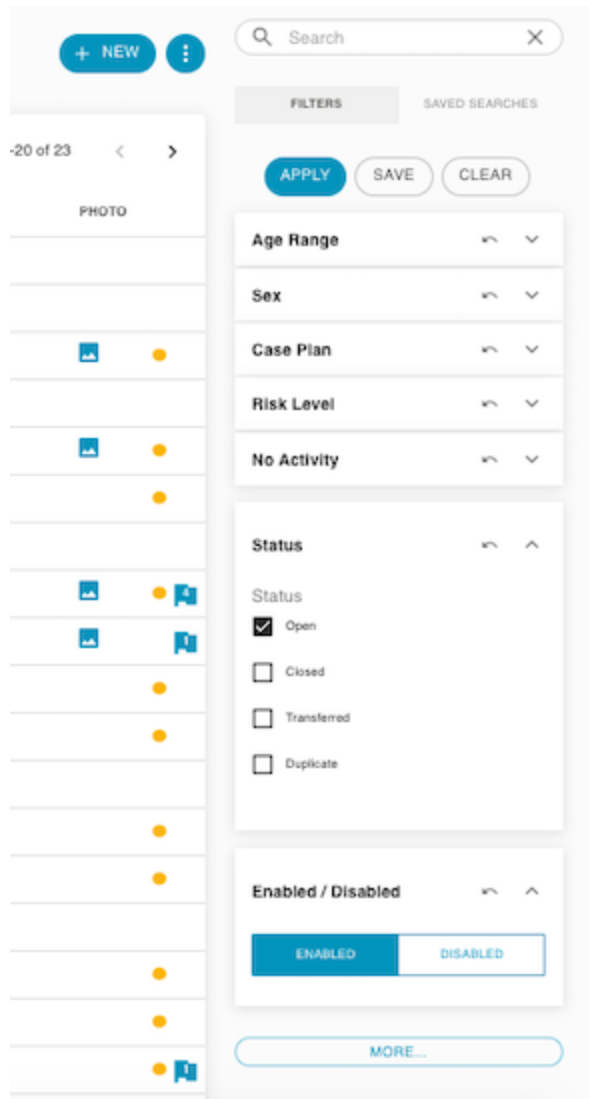
For more information on configuring the **View Details** modal and which information appears there, please see the **Primero Administration Guide**.

Filtering

On the right side of all of the Record Lists, you will see the **Filters Panel**. Filtering is an efficient way to find the record or records that need your immediate attention. Filtering allows you to search for a case with a particular feature - e.g. all cases of women (in which case, you will filter by 'Sex'). Or cases of a certain age group. Filters in Primero allow the user to search for cases by risk level, case status, etc.

NOTE: By default, the record list pages will only show records which are open and enabled. You can choose to show closed or disabled records using the "Status" and "Enabled / Disabled²" filters.

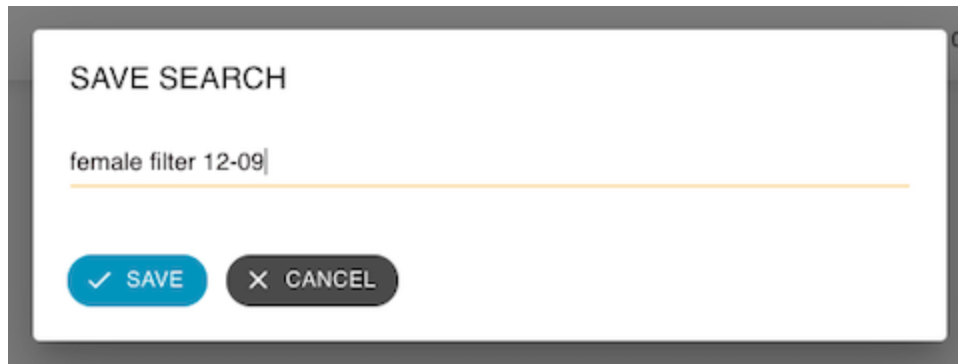
² Disabling a case equivalent to deleting a case in the sense that it will no longer be visible for the case worker but remains in Primero for recording purposes.



The most-commonly-used filters are always visible at the top of the Filters Panel. To expose more specific filters, click the "More" button below the panel. To re-hide these, click "Less".

Once you have set one or more filters, click the "Apply" button at the top of the Filters panel to update your list results. To clear the filters you have selected, click the "Clear" button.

You can also save a set of filters for later use by clicking the "Save" button at the top of the Filters Panel. This opens the modal pictured below.

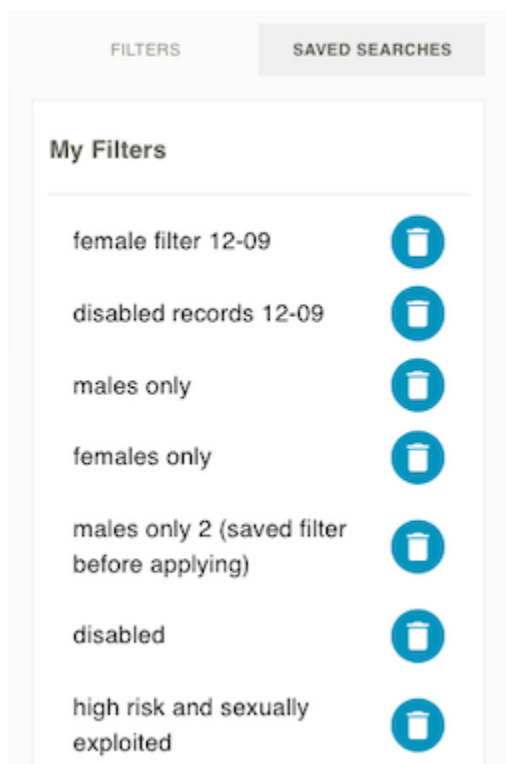
A modal dialog box titled "SAVE SEARCH" with a close button in the top right corner. It contains a text input field with the text "female filter 12-09" and a horizontal orange line below it. At the bottom, there are two buttons: a blue "SAVE" button with a checkmark icon and a grey "CANCEL" button with an "X" icon.

SAVE SEARCH

female filter 12-09

✓ SAVE X CANCEL

Enter a name for your new saved search and click "Save". Once the search has finished saving, click on the "Saved Searches" tab at the top of the filters panel.

A panel titled "My Filters" with two tabs: "FILTERS" and "SAVED SEARCHES". The "SAVED SEARCHES" tab is selected. Below the tabs, there is a list of seven saved searches, each with a trash can icon to its right. The searches are: "female filter 12-09", "disabled records 12-09", "males only", "females only", "males only 2 (saved filter before applying)", "disabled", and "high risk and sexually exploited".

FILTERS SAVED SEARCHES

My Filters

- female filter 12-09
- disabled records 12-09
- males only
- females only
- males only 2 (saved filter before applying)
- disabled
- high risk and sexually exploited

Here, you can find the search you had saved earlier. Click on the saved search to apply the filters that were saved. To delete a saved search, you can click on the trash can button next to it.

ID#	NAME	AGE	SEX	REGISTRATION DATE	PHOTO
49d5a72	Michael Williams	6	Male	03-Oct-2020	
e4990cc	John Baker	10	Male	02-Oct-2020	
bdf3871	Denise G Cornswoggler	7	Female	24-Sep-2020	
c2fb9e9	Andrea Ambergis	15	Female	22-Sep-2020	
b9b1c7e	Tom Smith	3	Male	11-Sep-2020	
cc81cf1	Milton Evenbrockle	9	Male	10-Sep-2020	
75567b8	Bob G Miller	13	Male	01-Sep-2020	
ccfa3b8	harold tulip marcus	12	Male	29-Jun-2020	
AMA2/05/20/d9403d9	olaf smeivit durgunsen	12	Male	20-May-2020	
KDMA/04/20/9425d97	yasmin khouri	12	Female	30-Apr-2020	

For the **User Group Filter**: Remember that, even if you are not in a user group, you still may have access to cases that are in that user group. For instance, I may work in Camp 1, but someone from Camp 2 may have referred a case to me. Therefore, I will see the *User Group* filter and the corresponding user groups.

Viewing and Editing a Record

In the Case List, you can click on any Case to see more details. You will arrive at the View Case page. On this page, you can only *view* information about the case; you cannot *edit* it. In order to edit information about the case, click the "Edit" button with the pencil icon at the top right of the page.

CASE ID: E4990CC

1 NEW — 2 ASSESSMENT — 3 CASE PLAN — 4 SERVICE PROVISION — 5 CLOSED

Record Information ^

Case Conference Details

Identification / Registration v

Incident Details

BASIC IDENTITY

Case ID
e4990cc

CPIMS ID
--

FLAGS EDIT

You should now be able to update information about the case. Once you have made changes, click the **SAVE** button in the header. NOTE: If you do not click the Save button, your changes will be lost.

CASE ID: E4990CC

1 NEW — 2 ASSESSMENT — 3 CASE PLAN — 4 SERVICE PROVISION — 5 CLOSED

Record Information ^

Case Conference Details

Identification / Registration v

Incident Details

Basic Identity

Case ID: e4990cc

CPIMS ID

Legacy CPIMS (or other system) ID

X CANCEL ✓ SAVE

You can find more details on this topic in the [Creating, Viewing, or Editing a Case](#) section. Note that depending on your permissions, for example if you are a case worker you can only edit your own cases and if you are a manager or administrator you are able to view records, not edit.

Workflow Status Bar

On the view and edit pages for a Case, the user will see the **Workflow Status Bar**. This tells the user which stage of the case management workflow the case has reached.

The Primero configuration has the following workflow which is aligned to the inter-agency Case Management Task Force forms:

Primero

CASE ID: UNICEF-1389A44

1 NEW — 2 ASSESSMENT — 3 CASE PLAN — 4 SERVICE PROVISION — 5 SERVICE IMPLEMENTED — 6 CLOSED

Record Information ^

Identification / Registration v

Referral Details

Individual's Details

Care Arrangements

Family Profile

Case ID: UNICEF-1389A44

Case Status: Open

FLAGS EDIT INFO

- **New** - When the case is first opened, before any services are added, the status bar will highlight the "New" status.
- **Assessment** - This status is set when the case worker enters the date in "Assessment requested on" field on the Assessment Status form.
- **Case Plan** - This status is set when the user records a value for the "Date Case Plan Initiated" field on the Case Plan form.
- **Service Provision** - If the user adds an entry to the Services subform, this status gets set.
- **Service Implemented** – This status is applied when all services are marked as complete.

- **Closed** - This status is applied when a user performs the "Close" action on a Case.
- **Reopened** - This status is applied when a user performs the "Reopen" action on a Case. In this situation, the "Reopen" status appears where the "New" status normally appears in the Workflow Status Bar. This indicates that the case management workflow has started from the beginning.

Navigating Case Forms

When you are viewing, creating, or editing a record in Primero, you can move between Forms using the **Form Navigation Menu**, which appears on the left side of the screen. Forms in Primero have been customized from the Global Inter-Agency Case Management Task Force Forms:

The screenshot displays the 'NEW CASE' form in the Primero system. On the left, a sidebar contains navigation links: Online, Home, Tasks, Cases, Exports, Support, primero_cp, Log out, and a language selector set to English. The 'Form Navigation Menu' is a vertical list of form categories, with 'Identification / Registration' expanded to show a sub-list of forms including 'Individual's Details', 'Care Arrangements', 'Family Details', 'Protection Concerns', 'Consent', 'Initial Screening Assessment', 'Comprehensive Assessment', 'Social Enquiry Report', 'Case Plan', 'Reunification Details', 'Services / Follow Up', 'Case Conference Details', and 'Closure'. The 'Individual's Details' form is currently selected and displayed on the right. It includes fields for Case ID, Case Status (set to 'Open'), Case Reopened? (checkbox), Full Name, First Name *, Middle Name, and Surname *. At the top right of the form are 'CANCEL' and 'SAVE' buttons.

You will notice that some Forms appear under a collapseable header. This is called a **Form Group**. In the above image, "Identification / Registration" is a Form Group, which contains a number of Forms, including "Individual Details." When you click on a Form Group, the Form Group opens, and you arrive at the first Form in the group. Click on any other Form in the group to view that Form. To collapse an open Form Group, click on it again.

Creating, Viewing, or Editing a Case

Creating a Case

To create a case from the Case List, click on the NEW button. You will see a modal like the one pictured below.

- First run a search to check whether a record already exists for the individual you are registering.
 - You can type the individual's name or ID into the search bar and then click the SEARCH button at the bottom right of the modal.
 - If there is a match in the system, you will be taken to a search results page, which may include Cases managed by other users. (For more information on how to search read the *Searching for Records* section.)
 - You may request a transfer of the case if you find a match in the system. Refer to the *transfer* section on how to proceed.
 - If there is no match or if you do not search for an existing case, you can **skip and create a new case** on the bottom left of the modal.

CASES

☐ ID#

☐ 1d36d21

☐ 0622b8b

Create New Case

Enter the ID number to search for an existing record *

Search existing cases

SEARCH

Why? To prevent creation of duplicate cases.

+ SKIP AND CREATE NEW CASE

You will be prompted to review a series of options concerning the individuals consent and legitimate basis.

Create New Case

Please specify the individual's consent to receive case management services and for their data to be stored in Primero.

Select all consent agreements that apply

☐ Consent has been given for the child to participate in the case management process

☐ The individual providing consent agrees to share information about this case with other service providers according to the details described below.

+ CREATE CASE

Selections made on the consent and legitimate basis will appear on the “Consent & Assent” form.

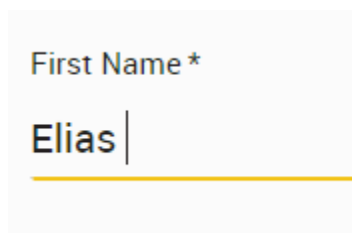
Once you have reached the new case page, you can navigate to different forms as described in the “Navigating Case Forms” section.

Editing a Case

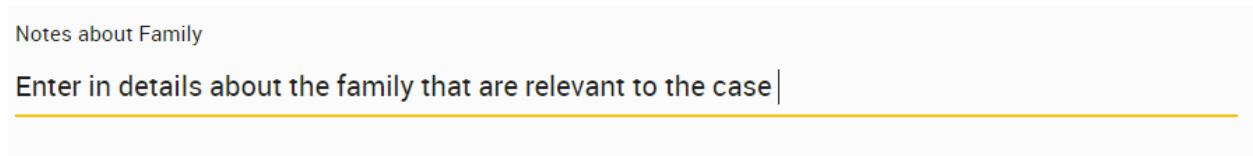
To edit a case, enter the case record and click the **EDIT** button. The page will then allow you to edit information in the forms.

There are a number of different field types which you can edit differently.

- **Text Field** - Type normally using your keypad or keyboard.

A screenshot of a text input field. The label "First Name *" is at the top left. The text "Elias" is entered into the field, followed by a vertical cursor bar. A thin yellow horizontal line is positioned below the text.

- **Text Area** - Similar to the Text Field, but the field expands as you type, allowing you to enter more information.

A screenshot of a text area input field. The label "Notes about Family" is at the top left. The text "Enter in details about the family that are relevant to the case" is entered into the field, followed by a vertical cursor bar. A thin yellow horizontal line is positioned below the text.

- **Date Field** - Opens a calendar widget where you can directly select the correct day, month, and year.
 - To go to another calendar month, click the side arrows to navigate forwards or backwards.
 - To choose another year, click on the year at the top left of the widget and select a year from the scrolling menu.
 - Clicking "OK" sets your choice; "Clear" returns you to today's date; "Cancel" does not make any changes.

2020

Sun, Nov 15

< Nov 2020 >

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

CLEAR CANCEL OK

- **Date-Time Field** - Similar to the **Date Field**, except that you can specify a date as well as a time.

2020

Nov 15 02:18 AM PM

< Nov 2020 >

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

CLEAR CANCEL OK

- **Tick Box** - Select the tick box if the statement in its label is true.

Is the age estimated?

☒ Yes

- **Select Dropdown** - Select an option from the dropdown menu. You can also try typing a word into the select field to narrow down the menu and find a desired option faster.

Sex

(Select...)

Male

Female

- **Multi-Select Dropdown** - Similar to Select Dropdown, but you can select more than one option from the dropdown menu.

Religion

Christianity

Other

Select all that apply

Islam

- **Radio Button** - Similar to Tick Box, click on the correct answer.

Consent is given share non-identifiable information for reporting

☒ Yes ☐ No

- **Numeric Field** - Type a number into the field. Non-numeric numbers will return an error.

Current Telephone

449784233247

You may be required to complete certain fields. Required fields can be identified by the star next to the field name. You will receive an error if you try to save the Case before filling out those fields. Red error messages will appear on the corresponding forms in the Form Navigation Menu to further help you identify the required fields.

NEW CASE

×

CANCEL

✓

SAVE

Record Information ^

Case Conference Details

Identification / Registration ● v

Incident Details

Basic Identity ●

Protection Concerns

Other Identity Details

Interview Details

Data Confidentiality

BASIC IDENTITY

● You need to address 4 fields on this form ^

First Name is required

Surname is required

Sex is required

Age is required

Case ID

CPIMS ID

INDIVIDUAL'S DETAILS

First Name *

First Name is required

If you enter a field incorrectly, the system will return a similar series of error messages and alerts when you try to save the case. In the example below, a negative age and a "Date of Birth" in the future cause errors until those fields are fixed.

Age *

-3

Age must be between 0 and 130

Date of Birth

01-Jan-2023

Cannot be in future.

Some fields may have help text, which is grey assistive text under a field to help you determine what the field is used for.

Date Case Plan Initiated

30-Mar-2020

This field is used for the Workflow status

Some fields may have guidance text, which is a more detailed summary of the field.

Identify the appropriate category regarding the client's safety

Safe

Guidance

Safe: No safety threats are identified at this time.
Based on currently available information, the client is not likely to be in immediate danger of serious harm. The decision can be made to either close the case or refer to non-child protection services.

Safe: Threats are present, client is not vulnerable or the client is vulnerable but protective capacities exists.
Safety plan is required for the client to remain in the home: One or more safety threats are present, but the client is not vulnerable or the client is vulnerable but protective capacities exist. Protecting safety interventions have been planned or taken that immediately mitigates the identified

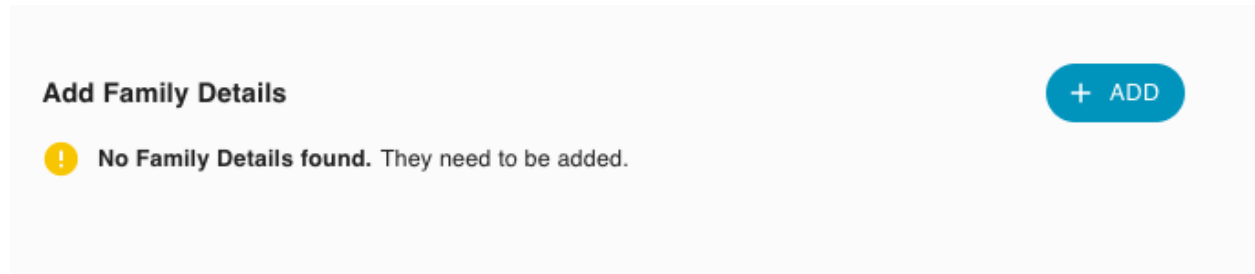
For more information on how to set which fields are required and other data constraints, please see the **Primero Administration and Configuration Guide**.

Navigating Subforms

Some Forms contain information that is entered multiple times. For example, a case worker might fill out the Name, Age, Date of Birth for multiple family members on the same Case. In situations like this, Primero organizes information in **Subforms**.

Adding Subforms

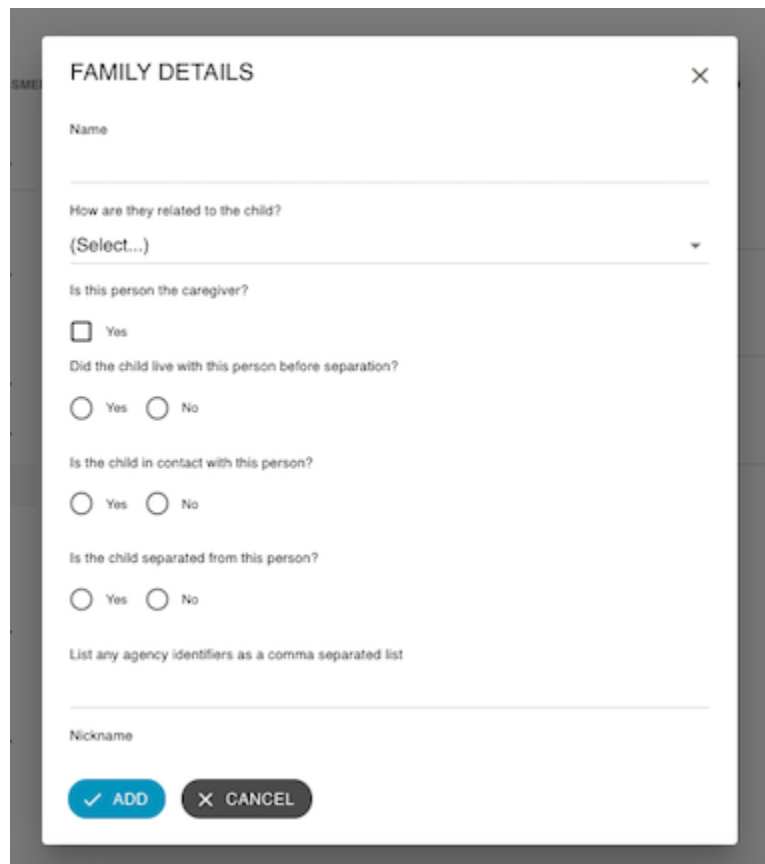
When you click into a Form that contains a subform, you will see an **ADD** button. Click this to add a **Subform Entry**.



Add Family Details + ADD

! **No Family Details found.** They need to be added.

A modal will appear. Here, you fill out information about the entry you want to add. For example, on the "Family Details" subform, you might add information about the Case's sibling.



FAMILY DETAILS ✕

Name

How are they related to the child?
(Select...) ▾

Is this person the caregiver?
☐ Yes

Did the child live with this person before separation?
☐ Yes ☐ No

Is the child in contact with this person?
☐ Yes ☐ No

Is the child separated from this person?
☐ Yes ☐ No

List any agency identifiers as a comma separated list

Nickname

✓ ADD ✕ CANCEL

When you are done filling in information, click **ADD** at the bottom of the subform modal. Note that if you click **CANCEL** instead, you will lose all of your changes.

Updating Subforms

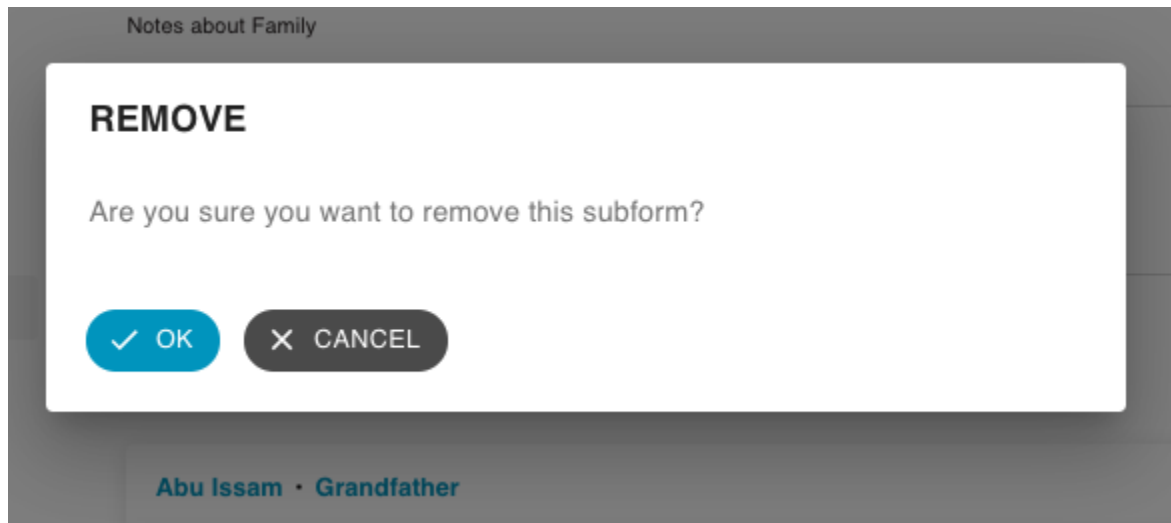
If multiple subforms are added in this way, they will be listed in collapsed form. Each can be reopened by clicking on the right-side arrows. Once you are finished with your edits, click **UPDATE** at the bottom of the subform in order to add your changes.



The screenshot shows a form titled "Add Family Details". At the top right is a blue button with a plus icon and the text "+ ADD". Below this is a list of four family members, each with a collapsed subform. The entries are: "Abu Issam • Grandfather", "Hala • Sister", "Ghaid • Mother", and "Issam Zeitouni • Father". To the right of each entry is a trashcan icon and a right-pointing chevron (>). A red rectangular box highlights the trashcan icons and chevrons for all four entries.

Removing Subforms

To remove a subform, click on the trashcan icon on the collapsed subform. A modal will appear asking you to confirm your decision.



The screenshot shows a modal dialog box titled "REMOVE". The text inside the modal asks, "Are you sure you want to remove this subform?". At the bottom of the modal are two buttons: a blue button with a checkmark icon and the text "OK", and a grey button with an 'X' icon and the text "CANCEL". Below the modal, the text "Abu Issam • Grandfather" is visible, indicating the subform being targeted for removal.

Other Documents

To upload PDF, TXT, DOC, DOCX, XLS, XLSX or CSV files, go to the "Other Documents" form. The maximum size of an upload is 10MB. You can upload up to 100 documents in 1 case record. (Note: This limit applies only when using the Primero X hosted service)

OTHER DOCUMENTS

Other Document

Only PDF, TXT, DOC, DOCX, XLS, XLSX, CSV files permitted



Alerts

Alerts help you keep track of updates to a Case's situation. Alerts are represented by small gold dots or message banners.

Case-level alerts:

- On the Navigation Menu, an alert next to the Cases link keeps track of total cases with alerts.
- In the Case Records List, a small gold dot appears next to each Case with one or more alerts.

ID#	NAME	AGE	SEX	REGISTRATION DATE	PHOTO
547704f	Fatime Yusef	7	Female	06-Oct-2020	
cd6dd0a	Alice Sorensson	2	Female	05-Oct-2020	
e4990cc	John Baker	10	Male	02-Oct-2020	
bdf3871	Denise G Cornswoggler	7	Female	24-Sep-2020	
c2fb9a9	Andrea Ambergris	15	Female	22-Sep-2020	
b9b1c7e	Torn Smith	3	Male	11-Sep-2020	

Form-level alerts:

- When you click into a case, an alert in the Form Navigation Menu indicates the form with updated information.

- When you click into the form, you can see a message banner alert that informs you of the reason for the alert.

The screenshot shows a web interface for a 'SOCIAL ENQUIRY REPORT'. On the left is a sidebar menu with the following items: 'Record Information' (with an upward arrow), 'Identification / Registration' (with an upward arrow), 'Initial Screening Assessment', 'Comprehensive Assessment' (with an upward arrow), 'Social Enquiry Report' (highlighted with a yellow dot), and 'Case Plan'. The main content area is titled 'SOCIAL ENQUIRY REPORT'. At the top of this area is a yellow-bordered box containing a yellow dot and the text 'Approval is pending for Social Enquiry Report'. Below this box, there is a section labeled 'Approved by Manager' with a checkbox and the text 'Yes'. Further down, there is a 'Date' field with a placeholder 'dd-mmm-yyyy'.

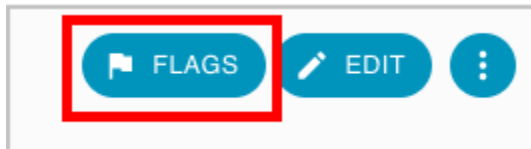
Alerts appear in any of the following situations:

- When you request approval for Assessment, Case Plan, and/or Closure. Alerts will appear on the corresponding form or forms pending approval. Once the form is approved or rejected by your supervisor, the alert goes away.
- When a new referral made to you
- When a new transfer is made to you
- When a supervisor adds a Note to your case. Once you view the note, edit and save your Case, the alert goes away.
- When another user directly edits a Services subform on your case. Once you edit and save your Case, the alert goes away.
- We can enable alerts and email notifications when updates are made by a service provider or when a case is updated by another user sharing the same case. This can be configured based on your programme. If this feature would be useful for your implementation, please share which forms would trigger alerts when updated by someone who does not own the case record with the Primero team if this is required. This is useful when there are case workers or case managers making changes to a service or for offline case management processes where case workers want to update a case not owned by themselves.
- When a case has been registered within the system with the same national ID (or similar field which has been configured in the system)

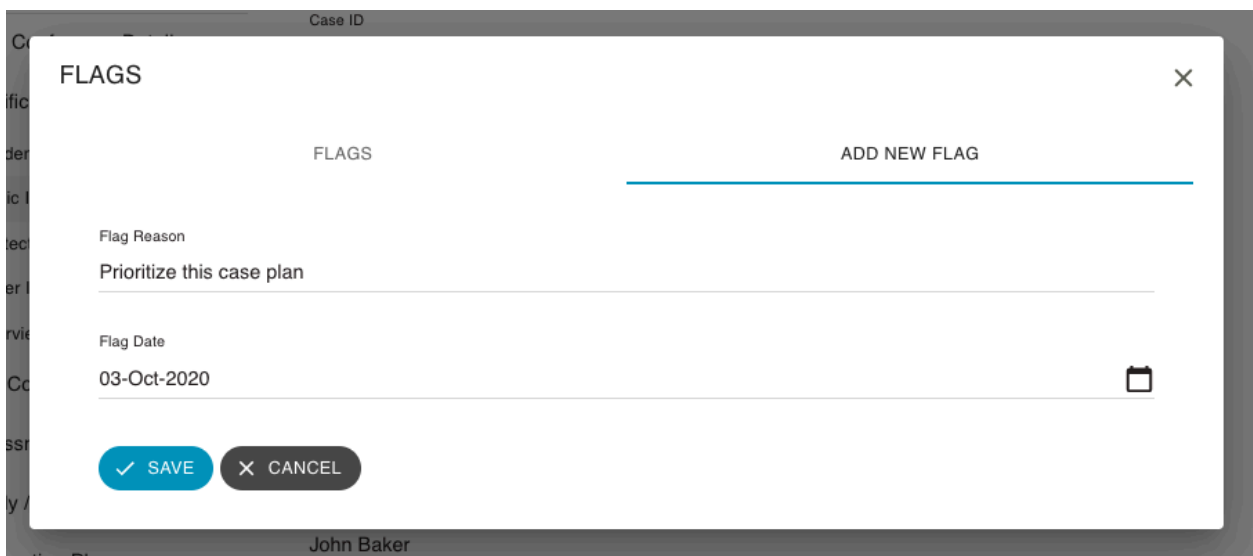
Note, services can be added to the user's profile as well as to the agency. If a service is added to the agency, all users will also by default provide those services. If a service is added to the user profile, and then a service is removed, by default they will not also have the services added to their agency.

Flagging

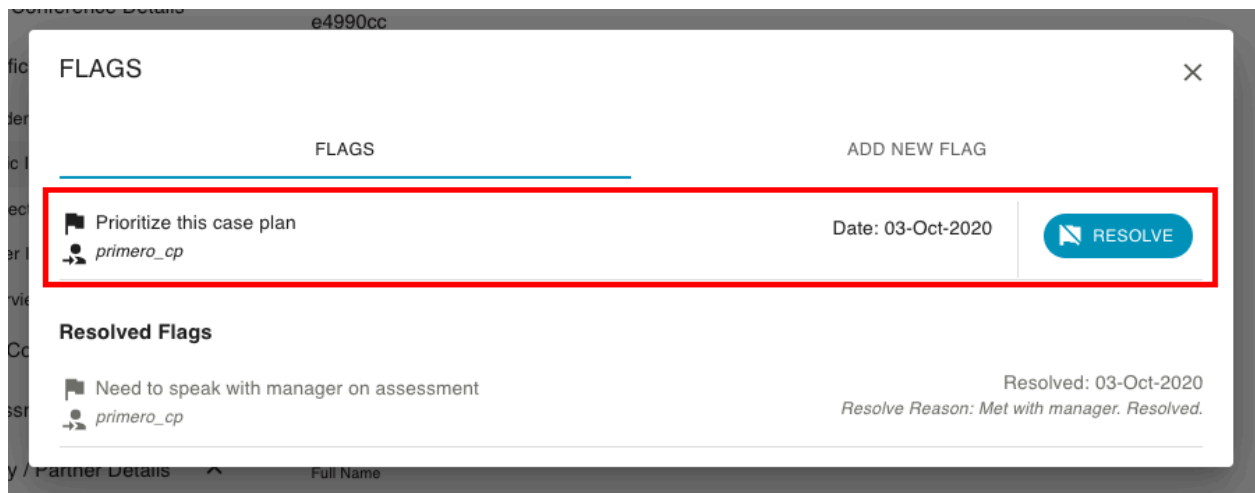
The **Flags** button allows a case worker or manager to leave a message or a "Flag" on a record. Usually, this is a reminder to other users that they need to perform an action (example: reminding a case worker to perform an assessment or reminding a manager to approve the Case Plan).



When you click the Flags button, a modal appears with two tabs: "Flags" and "Add New Flag". The "Flags" tab will open by default. Here, you will see a list of all flags that have already been added to this record. To add a new flag, click on the "Add New Flag" tab. Here, you can enter a reason for your flag, as well as a flag date.

A screenshot of the 'FLAGS' modal window. The modal has a title bar with 'FLAGS' and a close button. It features two tabs: 'FLAGS' and 'ADD NEW FLAG'. The 'ADD NEW FLAG' tab is selected. The form contains a 'Flag Reason' field with the text 'Prioritize this case plan', a 'Flag Date' field with the date '03-Oct-2020' and a calendar icon, and 'SAVE' and 'CANCEL' buttons at the bottom.

Once you click "Save", you will arrive back on the "Flags" tab. Here, you will see the flag you just saved.



Records which have active flags will appear in the record list with a flag icon displaying the number of active flags on that record.

☐	cd6dd0a	Alice Sorensson	2	Female	05-Oct-2020	
☐	e4990cc	John Baker	10	Male	02-Oct-2020	

When you are viewing a record, if it has any active flags, the **Flags** button will display a small red circle showing the number of active flags.



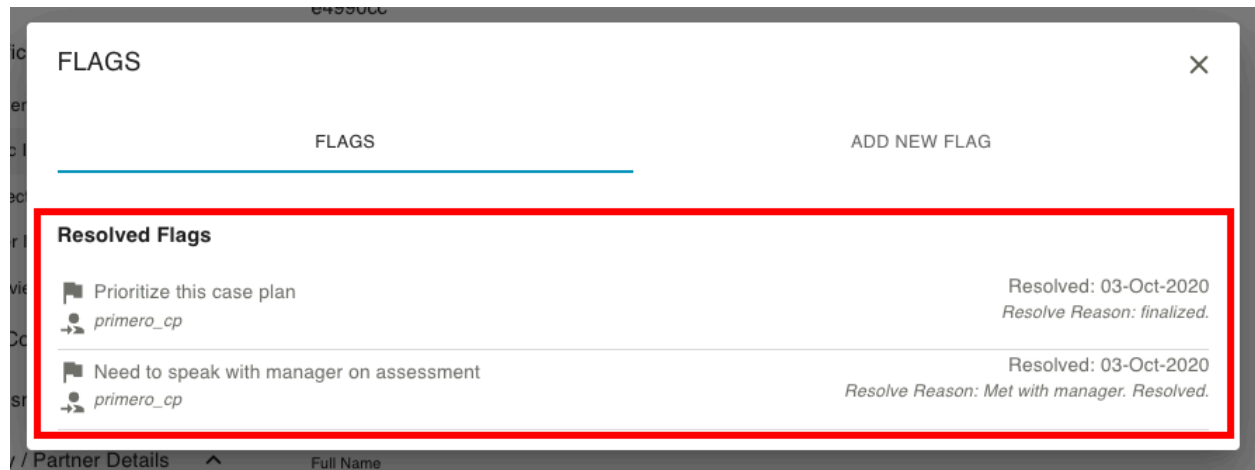
Once a flag is no longer relevant (example: your manager read the flag and approved your Case Plan as you requested), you can *resolve* the flag. To do this, click the **Resolve** button next to the flag. A modal will now appear where you can enter your reason for resolving the flag. NOTE: Only the user who created a flag can resolve it.



Once the flag is resolved:

- It will appear under the "Resolved Flags" header in the "Flags" tab of the Flags modal.

- It will no longer be included in the count of active flags which appears in the record list and on the "Flags" button (see below).



Note: Note: case workers and managers have the ability to have a flag dashboard functionality. This functionality does not work for users with roles that have access to "all records in the system" such as an administrator.

Change Log

Some case worker and manager roles may see a page under Record Information called the "Change Log." This page tracks all changes made to that Case, as well as the name of the user who made those changes. Changes can include simple field editing, updated subforms, and other actions such as approvals or transfers.

CASE ID: 46B0363

✓ NEW — ✓ CASE PLAN — 3 SERVICE PROVISION — 4 SERVICE IMPLEMENTED — 5 CLOSED

Record Information ▾

- Record Information
- Approvals
- Referrals
- Transfers / Assignments
- Change Log**
- Data Confidentiality
- Identification / Registration ▲
- Assessment ▲
- Case Plan
- Case Conference Details
- Services / Follow Up ▲
- Case Review

CHANGE LOG

- 21-Jan-2021 15:17**
workflow from "new" to "service_provision"
 primero_cp
- 21-Jan-2021 15:17**
 Updated "Services" subform [See Details.](#)
 primero_cp
- 24-Nov-2020 07:29**
Full Name from "Robin Tesland" to "Robin G Tesland"
 primero_cp
- 24-Nov-2020 07:29**
Middle Name from "--" to "G"
 primero_cp
- 23-Nov-2020 17:16**
Protection Concerns from "--" to ", "
 primero_cp
- 23-Nov-2020 14:17**
Case Manager's Location from "--" to "Country 1::Province 1::District 1"
 primero_cp
- 23-Nov-2020 13:05**
 Updated "Family Details" subform [See Details.](#)
 primero_cp

For more in-depth information about a subform update, click the “See Details” link on the Change Log to open up a modal window.

You will also be able to filter for a specific change by selecting the form or field. To do this enter in a specific form or field in the filter on the right.

CHANGE LOG

- 21-May-2021 17:58**
Child /Caretaker Telephone from "--" to "+10100002000"
 unhcr_cw
- 21-May-2021 17:57**
Sex from "Male" to "Female"
 unhcr_cw
- 21-May-2021 17:57**
Full Name from "Prim 63 Unhcr" to "Voting@2, Unhcr"
 unhcr_cw
- 21-May-2021 17:57**
Languages spoken by child from "--" to "Swahili"
 unhcr_cw
- 21-May-2021 17:57**
Religion from "--" to "Muslim"
 unhcr_cw

APPLY CLEAR

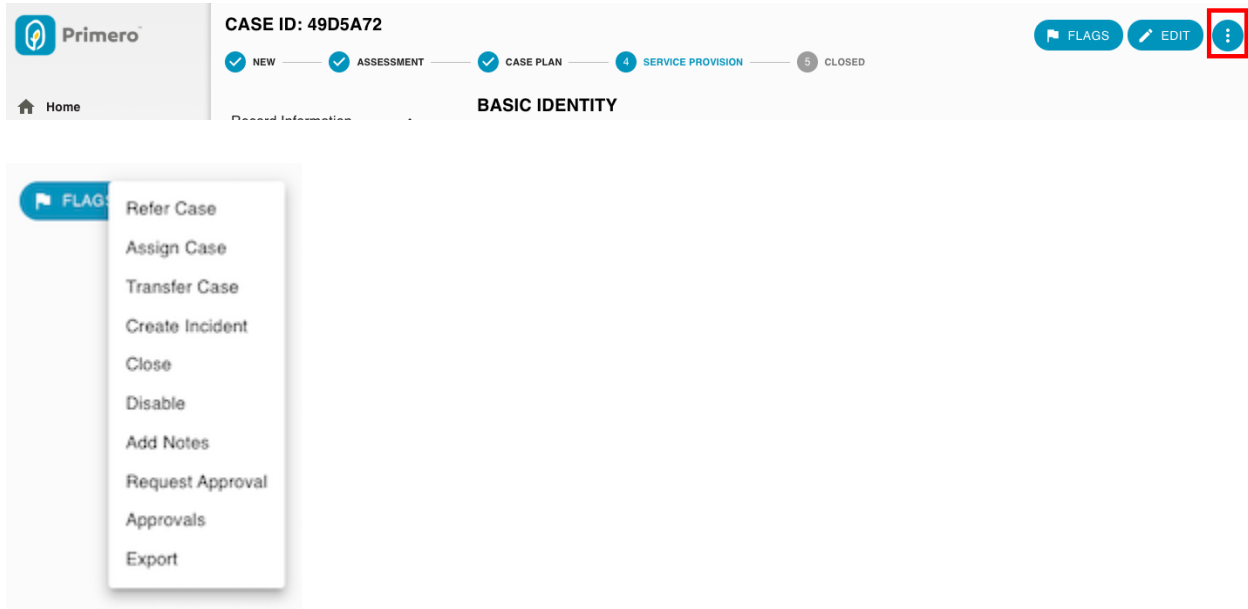
Form

Child's Personal... ✕

Field

Actions Menu

To the right of the "Edit" button on the View Case page, you should see a small button with three dots. This is the **Actions Menu**.



The full list of actions (which ones you see depends on your permissions):

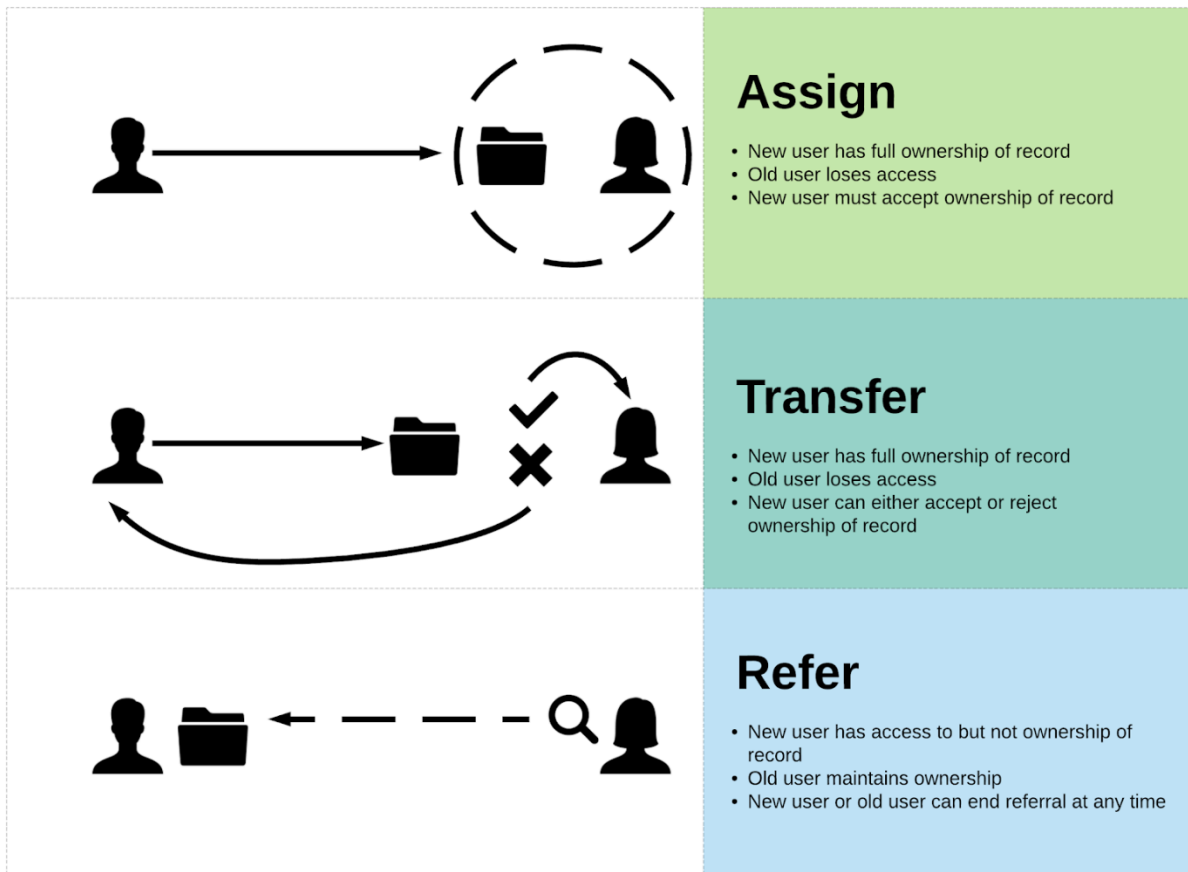
- Refer
- Assign
- Transfer
- Create Incident
- Close / Reopen
 - Note: This action will appear as "Close" if the Case is open, and "Reopen" if the Case is closed.
- Disable / Enable
 - Note: This action will appear as "Disable" if the Case is enabled, and "Enable" if the Case is disabled.
- Add Notes
- Request Approval
- Approvals
- Export

NOTE: When using these actions, you must follow the your local Standard Operating Procedures (SoPs). Primero does not replace normal day-to-day communications (e.g.

email, text, WhatsApp) between the people and organizations that perform Child Protection work.

Assignments, Transfers, and Referrals

There are three very important actions which allow you give another user access to your case: *Assign*, *Transfer*, and *Refer*.



Assignments

Case Managers have the ability to assign a case / cases to a different user. If you select the case(s) and then the Assign option, a modal will appear that allows you to select from existing users. Assigning the case will change the record owner to the selected user. The new owner will have full access to the record, and the previous case worker will lose their access.

Case managers have a dashboard that can be configured onto their home page which displays cases that need to be assigned. Displays the number of cases owned directly by the current manager (and not a case worker). This dashboard assumes that managers do not manage their own cases, and that, if a manager has their own cases, they should assign these cases to case workers on their team. The dashboard appears as shown below. The dashboard also shows overdue cases and you can view a tool tip by hovering over the risk level to see the timeframe for the overdue cases.

Cases To Assign			
	HIGH	LOW	NO PRIORITY
Cases To Assign	0	0	0
Overdue Cases To Assign	0	0	0

You have had these cases for more than three hours

Transfers

Managers can also transfer a record to a different user. Unlike assignments, however, transfers give the recipient the opportunity to accept or reject the record. If the recipient rejects it, the record will stay with its original owner. If recipient accepts it, they will now have full ownership of the record, and the original owner will no longer have access.

The screenshot displays the Primero case management interface. On the left is a sidebar with navigation options: Home, Tasks, Cases (15), Incidents, Tracing Request, Exports, Support, and user information (primero_cp, Log out). The main header shows the case ID 'UNICEF-F2508B8' and a progress bar with stages: REOPENED, ASSESSMENT, CASE PLAN, SERVICE PROVISION (current), and CLOSED. Action buttons for FLAGS, EDIT, and a menu are in the top right.

The 'TRANSFERS AND ASSIGNMENTS' section is active, showing a list of transfers. The first transfer, dated 26-Mar-2020, is in 'IN PROGRESS' status. It includes fields for Recipient (primero_mgr_cp_ar), Assigned By (primero_mgr_cp), Consent to share setting overwritten? (Yes), and Did the case worker have the individual's consent to make this transfer? (Yes). Notes include 'test transfer'. Below this, two other transfers from 02-Mar-2020 are shown, both with a 'REJECTED' status.

Transfer Date	Status	Recipient	Assigned By	Consent to share setting overwritten?	Did the case worker have the individual's consent to make this transfer?	Notes
26-Mar-2020	IN PROGRESS	primero_mgr_cp_ar	primero_mgr_cp	Yes	Yes	test transfer
02-Mar-2020	REJECTED					
02-Mar-2020	REJECTED					

When you select the Transfer action from the Action Button, a modal will appear so you can add the correct information for the transfer. Consent of the individual (or a consent override) is required. The consent question is typically on the Consent and Assent form and is labelled “Consent has been given for the child to participate in the case management process”. The individual providing consent agrees to share information about the case with other service providers. You may also be asked if you are transferring to a remote system (ie. someone who does not use Primero). As this feature is not currently enabled for most configurations, you can ignore this field without affecting the Transfer action.

To select the user that you are transferring to, first select the agency and location associated with the user.

TRANSFER CASE CD6DD0A

Consent is not provided in the Forms.

☐ Transfer anyway?

☐ Are you transferring to a remote system?

☐ Do you have consent from the individual to make this transfer?

Agency
Select...

Location
Select...

Recipient*
Select...

Notes

✓ TRANSFER X CANCEL

Once you have selected an agency and location for your transfer, the "Recipient" field will only display users who are part of that agency and based in that location.

TRANSFER CASE AMA2/10/20/B7BBBED

Consent is not provided in the Forms.

☒ Transfer anyway?

☐ Are you transferring to a remote system?

☒ Do you have consent from the individual to make this transfer?

Agency
DSWCD

Location
Select...

Recipient*
Select...

primero_dswcd_mgr_cp
primero_mgr_regional

If the desired user is not in the drop down, it means this user does not have privileges to be transferred to or that the user does not meet the criteria selected in the Agency or Location fields.

Accepting or Rejecting Transfers

You have the ability to receive a case transfer. You can see if any cases have been transferred to you on your dashboard under "Shared With Me - Transfers Awaiting Acceptance".

OVERVIEW

CASES BY ASSESSMENT LEVEL

2 HIGH

1 MEDIUM

0 LOW

MY GROUP'S CASES

9 Open

0 Closed

SHARED WITH ME

1 Transfers Awaiting Acceptance

SHARED WITH OTHERS

0 Referrals

0 Pending Transfers

0 Rejected Transfers

When you enter the case that has been transferred to you, open up the Record Information form group and click on the Transfers / Assignments form. You will see that the status is in progress. Clicking on the menu at the far right displays buttons to either accept or reject the transfer.

Primerio

Home

Cases 22

Tracing Request

Reports

Exports

Support

primero_mgr_cp

Settings

Log out

CASE ID: UNICEF-E4B0068

1 NEW 2 ASSESSMENT 3 CASE PLAN 4 SERVICE PROVISION 5 CLOSED

Record Information

Record Information

Approvals

Referrals

Transfers / Assignments

Case Conference Details

Identification / Registration

Data Confidentiality

Assessment

Family / Partner Details

TRANSFERS AND ASSIGNMENTS

16-Mar-2020 TRANSFER

IN PROGRESS

Recipient primo_mgr_cp

Assigned By primo_admin_cp

Consent to share setting overwritten? Yes

Did the case worker have the individual's consent to make this transfer? Yes

Notes test transfer to manager

Primerio

Home

Cases 22

Tracing Request

Reports

Exports

Support

primero_mgr_cp

Settings

Log out

CASE ID: UNICEF-E4B0068

1 NEW 2 ASSESSMENT 3 CASE PLAN 4 SERVICE PROVISION 5 CLOSED

Record Information

Record Information

Approvals

Referrals

Transfers / Assignments

Case Conference Details

Identification / Registration

Data Confidentiality

Assessment

Family / Partner Details

TRANSFERS AND ASSIGNMENTS

16-Mar-2020 TRANSFER

IN PROGRESS

Recipient primo_mgr_cp

Assigned By primo_admin_cp

Consent to share setting overwritten? Yes

Did the case worker have the individual's consent to make this transfer? Yes

Notes test transfer to manager

By clicking 'Accept' you accept the responsibility for this case; once you click 'Accept' you will become the record owner in the system.

ACCEPT CANCEL

If you click to accept the case, the status will change to accepted, and you will become the record owner, rather than an “Other Assigned User”. The record information is updated with this change (see below images).

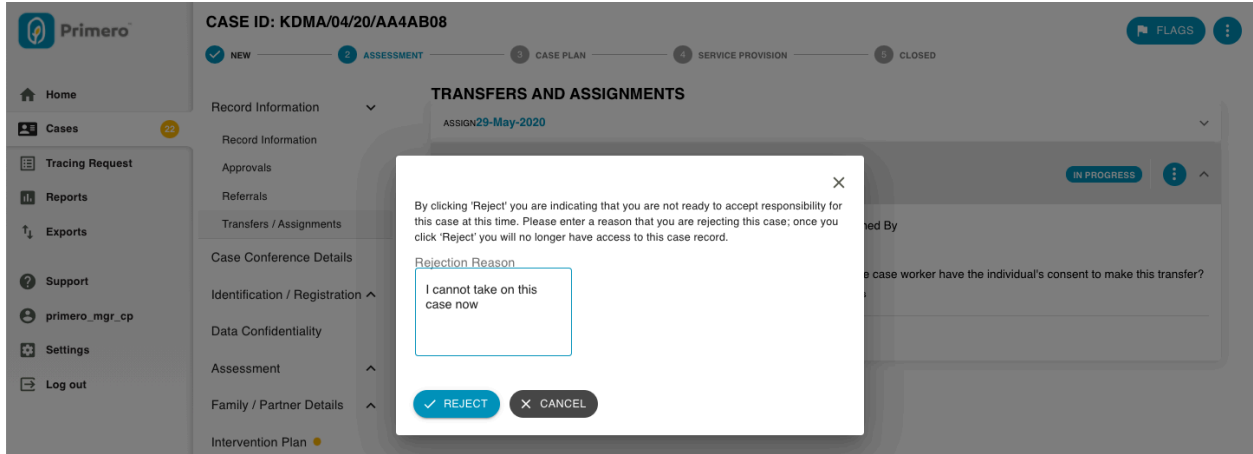
Before accepting the transfer:

The screenshot shows the Primero interface for Case ID: UNICEF-E4B0068. The left sidebar contains navigation links: Home, Cases (22), Tracing Request, Reports, Exports, Support, primero_mgr_cp, Settings, and Log out. The main content area displays the 'RECORD INFORMATION' section. The 'Caseworker Code' field is highlighted with a red box and contains the value 'primero'. Other fields include Agency (UNICEF), Other Assigned Users (List ["primero_cp_ar", "primero_mgr_cp", "primero_cp"]), Record created by (primero), Created by agency (Created by agency), Previous Owner (primero), Previous Agency (Created by agency), and Module (primeromodule-cp).

After accepting the transfer:

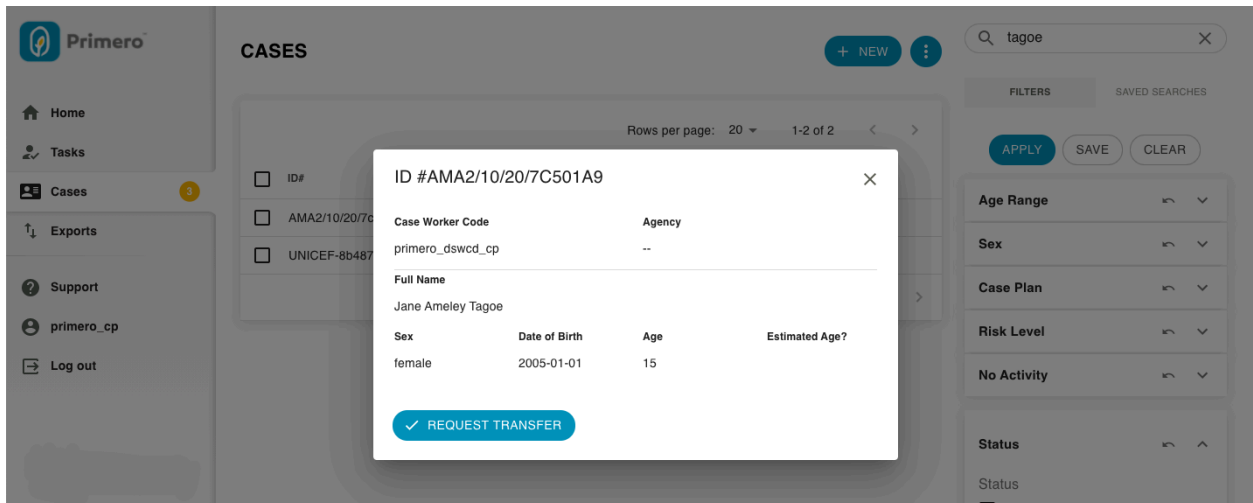
The screenshot shows the Primero interface for Case ID: UNICEF-E4B0068. The left sidebar contains navigation links: Home, Cases (22), Tracing Request, Reports, Exports, Support, primero_mgr_cp, Settings, and Log out. The main content area displays the 'RECORD INFORMATION' section. The 'Caseworker Code' field is highlighted with a red box and contains the value 'primero_mgr_cp'. Other fields include Agency (UNICEF), Other Assigned Users (List ["primero_cp_ar", "primero_cp"]), Record created by (primero), Created by agency (Created by agency), and Module (primeromodule-cp).

If you click Reject, a modal opens with text box for entering the Rejection Reason. When you click REJECT, the rejection reason is in the transfer subform on the Case and the transfer status is changed to 'Rejected.' You are will then lose access to the record.



Requesting a Case Transfer

If you find a record owned by another user and need full access to it, you can ask the record owner to transfer the record to you. In Primero, this is known as a *Transfer Request*. Your ability to perform a *Transfer Request* will depend on your instance's configuration. To request a transfer, first search for your case from the case list view. When you identify the case in the search results, clicking on the case will open the *View Details* modal.



At the bottom left of the *View Details* modal, you will see a button marked "Request Transfer". Click it, and a modal will appear. **Note:** you must also have the permission to receive transfers to be able to request a transfer of a case.

Rows per page: 20 1-2 of 2

ID#
AMA2/10/20/7c
UNICEF-8b487

ID #AMA2/10/20/7C501A9

Case Worker Code

primero_dswcd_cp

Agency

--

Notes *

need access

✓ SEND REQUEST

✕ CANCEL

Here, you will see information on the record owner and a text box where you can enter a note to the owner of the record. Click "Send Request" to submit.

Once you have sent the transfer request, the Case's record owner - if their user account is configured with an email address and the ability to receive email notifications - will receive a notification telling them about your request for a record transfer. If there is no email address, they can also accept or reject a transfer request in the system.

Transfer request for one of your cases Inbox x

primero.dev@quoinc.com via amazonses.com May 23 (12 days ago)

to jack.miszencin

Primero user **primero_cp** from UNICEF is requesting that you transfer ownership of this Case record **0b07cfc** so that they can provide Case management services for the individual in their area. If this transfer is acceptable to you, please click on the Case ID link in this email to open the Case in Primero and initiate the transfer.

Notes from the individual making the request: Hey, can I please have access to this case.

Click here to [Reply](#), [Reply to all](#), or [Forward](#)

If the Case record owner clicks on the link in the email, they will arrive at the case record in Primero. Here they will see an alert in the Form Navigation Menu on the *Transfers / Assignments* form. Here, they can expand the transfer request subform to see the details of your request, including any notes you have included.

CASE ID: AMA2/08/20/49F5D9C

1 NEW 2 ASSESSMENT 3 CASE PLAN 4 SERVICE PROVISION 5 SERVICE IMPLEMENTED 6 CLOSED

Record Information

Record Information

Approvals

Referrals

Transfers / Assignments

Identification / Registration

Initial Screening Assessment

TRANSFERS AND ASSIGNMENTS

TRANSFER REQUEST	08-Oct-2020	IN PROGRESS
TRANSFER REQUEST	05-Oct-2020	IN PROGRESS
Recipient	[missing "en.transition.requested_by" translation] primero_cp	
Notes	need access	

At this point, the record owner can choose whether or not to transfer the record to the user who requested the transfer.

Activity Log

CPIMS+

Online
CONNECTED

Home

Activity Log

Cases 25

Incidents

Activity Log

Case #AC36907

primero_cp accepted transfer of Case AC36907 from primero_mgr_cp

Transfer

A specific permission allows users to have a new button on the navigation called "Activity Log" which needs to be enabled by the system administrator. This log displays cases which were transferred to another user and which of those cases were accepted. This ensures there is a log of accepted transfers since the case worker or manager otherwise would lose access to the case once transferred to another user.

Referrals

Referring a record is a way of giving a user limited access to a record without transferring it completely. While referring a record allows the recipient to access your record, the referring user will maintain full record ownership and will be able to remove the recipient's access at any time. To start a referral, click the **Refer** in the **Referring From Services Form** section below.

Note: the "Other Assigned User" field in the Record Information form would be populated if another user is able to view/edit the case in addition to the current owner. For example, this include be a service provider to whom the case was referred in addition to a user who has not yet 'accepted' a case transfer.

The following modal form will appear and allow you to select options for your referral.

REFERRAL CASE CD6DD0A

☐ Consent is not provided in the Forms.
☐ Refer anyway?

☐ Are you transferring to a remote system?

Service

Agency

Location

Recipient*

Notes

✓ REFER X CANCEL

As with transfers, consent of the individual is required for referral. Consent for referral is found on the Consent form where consent has been given for the child to participate in the case management process and the individual providing consent agrees to share information about the case with other service providers.

The following fields are important for selecting a user:

- **Service** you are requesting the other user perform
- **Agency** you would like to perform the service
- **Location** where you would like the service to take place



Now, select the “Recipient” - who must be a user within your deployment of Primero. A list of all users that perform the service selected, from the agency selected, and in the location selected will appear. If the desired user is not in the drop down, it means this user does not have privileges to be referred to or does not meet one of the three criteria listed above. **Note:** specifying type of referral restricts recipients’ ability to delete a service subform.

When sending a referral, you will also be able to select from a dropdown “Would you like to specify a Type of Referral?”. This dropdown is a list which determines the level of access the recipient has to the case to ensure information is shared on a need-to-know basis and based on information sharing protocols. **Note:** this list are roles configured by the system administrator.

REFERRAL CASE 12499A1

Service
Medical

Agency
Medecins Sans Frontieres

Location

Recipient *
hpierce

Would you like to specify a Type of Referral?

Case Worker > Alternative Care
Medical Administrator
Medical Service Provider

✓ Refer X Cancel

The recipient, for example, may have edit access to all forms in a case record for the cases they are managing. If, for example, they receive a referral where the Type of Referral is specified, they may have edit/view-only access to a few forms. If the recipient receives multiple referrals for the same child where the Type of Referral is specified, then the form access is additive and they may get edit/view-only access to additional forms. For example, if I am a case worker who receives a Legal Service referral and an Alternative Care Service referral for the same case, I would see both the forms needed for a Legal Service, and the forms needed for an Alternative Care Service.

If "Would you like to specify a Type of Referral?" is left blank, the recipient will get access to the forms they normally would have access to.

For more information on how to specify the Agency a user belongs to, the Location where they are based, and the Services they offer, please see the **Primero Administration and Configuration Guide**.

Referring to a Remote System

The "Remote System" option allows you to record a referral to an individual or organization who is not using Primero. This action will generate a PDF export of some limited information about the Case which you can give to the referral recipient. To start this process, select the tick box for "Are you transferring to a remote system?"

REFERRAL CASE CD6DD0A

Consent is not provided in the Forms.

☒ Refer anyway?

☒ Are you transferring to a remote system?

Type of Referral *

Referral

Service

Child Protection Service

Agency

Location

Recipient

✓ REFER CANCEL

The "Type of Referral" field indicates the level of information access your export file will include. The options in this list will generally be roles in the system which are permitted to see specific forms on the Case, depending on the role's expertise. For instance, one option might be "Medical Service Provider." Selecting this option will produce a non-encrypted PDF export file which only contains the information a Medical Service Provider would be able to see in Primero. In the example above, we have chosen a generic "Referral" type.

Revoking a Referral

The Case Worker who manages the Case can remove a referral recipient's access to a Case, usually upon completion of the referral work. To revoke a Case you have referred to another user, simply enter the Case and go to the **Referrals** form in the **Record Information** form group. Expand the referral subform for the recipient you wish to remove and click the **REVOKE** action in the referral's action menu.

REFERRALS

05-Oct-2020 REFERRAL

IN PROGRESS



Recipient
test-services

Assigned By
primero_cp

Consent to share setting overwritten?
☒ No

Service
Livelihoods Service

IN PROGRESS

Revoke

Notes

Once you have revoked a referral, that referral's recipient will no longer have access to the Case. The referral's status changes from *In Progress* to *Done* to indicate that the referral has been closed and the recipient no longer has Case access.

05-Oct-2020 REFERRAL

DONE



Recipient
min-ref-2

Assigned By
primero_cp

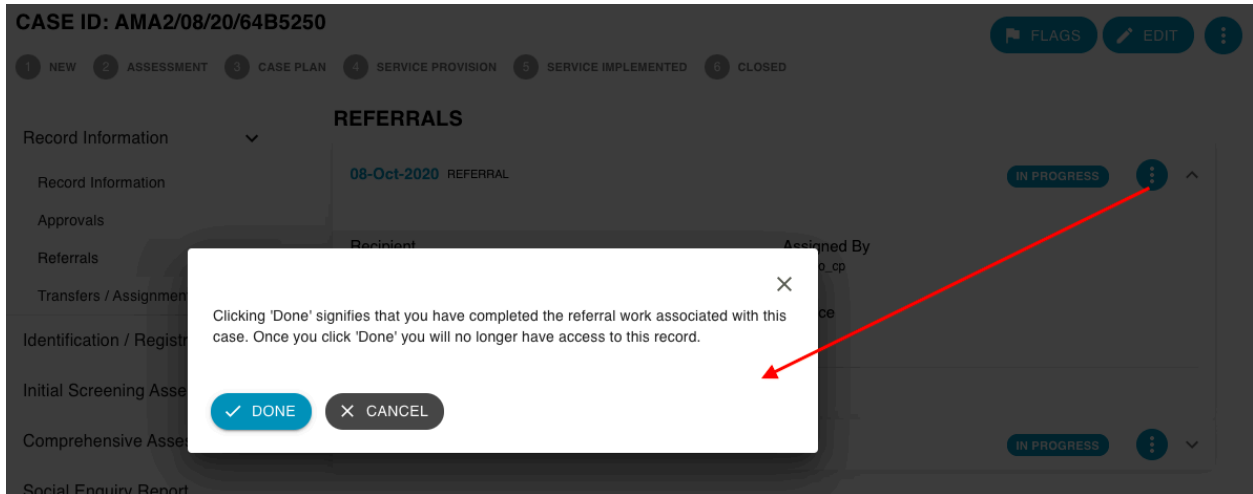
Consent to share setting overwritten?
☒ No

Service
Health/Medical Service

Notes

Relinquishing a Referral

If you have received a Case referral, you can relinquish the referral and give up access to the Case at any time by marking the referral as **Done**. Go to the case record, click on the *Referrals* form in the *Record Information* form group. Click the **DONE** action in the Actions menu of the appropriate referral. Primero will then ask you to confirm your decision in a modal. Once you have marked the referral as **Done**, the referred Case will be removed from your Case List and you will no longer have access to it.



Create Incident

The **Create Incident** action on the Case Show page allows you to link an incident to a Case. When you finish entering data for the new linked Incident, select “Save and Return” to return to the View Case page. The “Associated Case” ID link also enables you to view and navigate to the Incident’s linked Case record.

Once you have saved the Incident, there are two possible ways to view/edit the Incident.

1. **From the View Case page:** You can access any Incidents linked to a Case by navigating to the Incidents form in the Record Information form group. The linked Incidents will appear as collapsed subforms, from which you can choose to either View or Edit the incident.

The screenshot shows the 'View Case' page for Case ID: 87EC3C9. The page has a progress bar at the top with five steps: 1. NEW (checked), 2. ASSESSMENT (active), 3. CASE PLAN, 4. SERVICE PROVISION, and 5. CLOSED. A 'FLAGS' button is in the top right. On the left is a sidebar with a 'Record Information' dropdown menu containing: Record Information, Approvals, Incidents (highlighted), Referrals, Transfers / Assignments, Change Log, Case Conference Details, Identification / Registration, and Data Confidentiality. The main content area is titled 'INCIDENTS' and has a '+ NEW' button. It displays two incident entries: '24-Nov-2020 Physical Assault' (collapsed) and '12-Jan-2021 Sexual Assault' (expanded). The expanded entry shows details: Date of Interview (13-Jan-2021), Date of Incident (12-Jan-2021), and Type of Violence (Sexual Assault). To the right of these details are 'VIEW' and 'EDIT' buttons.

2. **From the Incidents List:** The Incident will also appear on the Incidents record list. From this page, you can also choose to View or Edit the incident.

To link an Incident to a Case is to first create the Case, and then select the “Link Incident to Case” action.

The screenshot shows the 'Incident' form for Incident ID 90b2e4f. The left sidebar has a 'Record Information' dropdown menu with options: Record Information, Summary of the Incident, Incident (highlighted), Violations Forms, and Other Forms. The main content area is titled 'Incident' and shows fields: Long ID (38dffbc8-5ca4-49a2-b2ce-47b7f90b2e4f), Incident ID (90b2e4f), and Incident Code (90b2e4f). In the top right corner, there are 'Flags' and 'Edit' buttons, and a three-dot menu. This menu is open, showing options: Assign Incident, Disable, Export, and 'Link Incident to Case' (which is highlighted with a red rectangle).

Once selected, you will be able to search for the case you would like to link the incident to. You are able to search by the long ID, incident code, survivor code, name, incident ID IR, incident ID, and account of incident to find the case.

Incident ID 90b2e4f

Record Information

Summary of the Incident

Incident

Violations Forms

Other Forms

Incident

Long ID
38dffbc8-5ca4-49a2

Incident ID
90b2e4f

Incident Code
90b2e4f

Link Incident to Case

Q 068218a

Name	Case ID	Age	Gender
Jack Ben	068218a	5	Male

Rows per page 20 1-6 of 6 < >

Once the case is retrieved, select “Link” and the incident will then be linked to the case selected.

Incident ID 90b2e4f

Record Information

Summary of the Incident

Incident

Violations Forms

Other Forms

Incident

Long ID
38dffbc8-5ca4-49a2

Incident ID
90b2e4f

Incident Code
90b2e4f

Incident Status
Open

Link Incident to Case

Q jack

< Back

✓ Link

Case 068218a

Name	Jack Ben
Age	5
Sex	male

You can “Link” an incident to another case by following the above process at any time. You will not be able to “unlink” an incident from a case. Users who have this permission also can “Link Incidents to Cases” from the Incident List and can Link up to 100 incidents at 1 time to a case.

Incidents

16 incident(s) selected Clear selection

Rows per page 20 1-16 of 16 < >

✓	ID#	Date of Incident	Date of Interview	Date of Incident	Violence Type	Date of Incident	Violence Type	Incident Location	Violations	Social Worker
✓	90b2e4f	03-Mar-2024	04-Mar-2024	03-Mar-2024		03-Mar-2024		District 1	Abduction, Recruitment and/or use	primero_mmm_tech_user
✓	004bfe	03-Mar-2024	04-Mar-2024	03-Mar-2024		03-Mar-2024		District 1	Maiming, Attacks on schools, Abduction	monitor1
✓	b59e69a	04-Feb-2024	06-Feb-2024	04-Feb-2024	Sexual Assault	04-Feb-2024				primero_gbv_caseworker
✓	bfa3a6	18-Feb-2024	19-Feb-2024	18-Feb-2024	Sexual Assault	18-Feb-2024				primero_gbv_caseworker
✓	047509b	06-Feb-2024	16-Feb-2024	06-Feb-2024		06-Feb-2024		District 1	Killing, Recruitment and/or use	primero_mmm_tech_user
✓	4200ec3	06-Feb-2024	09-Feb-2024	06-Feb-2024		06-Feb-2024		District 1	Attacks on hospitals, Rape and other forms of sexual violence	monitor1

+ New

Assign Incident

Export

Link Incident to Case

Filters

Apply

Save

Clear

Filter Category

Incidents

Flagged

Violence Type

Field/Case/Social Worker

Agency Office (GBV field)

User Groups

An **alternative method** of creating a linked Incident is to navigate to the Incidents form within the Record Information form group. Then, click the +NEW button at the top right of the Incidents

form to create a new linked Incident. The rest of the Incident workflow is the same as described above.

The screenshot displays a case management interface for Case ID: 87EC3C9. At the top, a progress bar shows five stages: 1. NEW (checked), 2. ASSESSMENT, 3. CASE PLAN, 4. SERVICE PROVISION, and 5. CLOSED. A 'FLAGS' button is in the top right. The left sidebar contains a menu with items: Record Information, Approvals, Incidents (highlighted with a red box), Referrals, Transfers / Assignments, Change Log, Case Conference Details, Identification / Registration, and Data Confidentiality. The main area is titled 'INCIDENTS' and contains a list of incidents. The first incident is dated '24-Nov-2020' and is a 'Physical Assault'. The second incident is dated '12-Jan-2021' and is a 'Sexual Assault'. Below the list, there are fields for 'Date of Interview' (13-Jan-2021), 'Date of Incident' (12-Jan-2021), and 'Type of Violence' (Sexual Assault). To the right of these fields are 'VIEW' and 'EDIT' buttons. A '+ NEW' button is highlighted with a red box in the top right corner of the Incidents panel.

NOTE: When a Case with linked incidents is referred, transferred, or assigned to another user, any linked Incident records are moved along with the Case record.

Close / Reopen

The **Close / Reopen** action allows you to change a Case's "Case Status" field. Only certain users have the ability to perform this action.

When a Case is open, this action appears as **Close** in the Actions menu. Clicking this action will change the Case Status field to "Closed", and the Workflow Status to "Closed". NOTE: Once a Case is closed, it will not appear by default on the Case List page. For information on how to find closed Cases, please see the [Filtering](#) section.

When a Case is closed, the action appears as **Reopen** in the Actions menu. clicking this action will change the Case Status field to "Open" and set the "Case Reopened?" field on the Individual Details form. It will also set the Case's Workflow Status to "Reopened".

CASE ID: AWDA1/11/20/991F53C

1 NEW — 2 ASSESSMENT — 3 CASE PLAN — 4 SERVICE PROVISION — 5 SERVICE IMPLEMENTED — 6 CLOSED

Record Information ^

Identification / Registration v

Referral Details

Individual's Details

Care Arrangements

Family Details

Protection Concerns

Consent

INDIVIDUAL'S DETAILS

Case ID
AWDA1/11/20/991f53c

Case Status
Open

Case Reopened?
☐ Yes

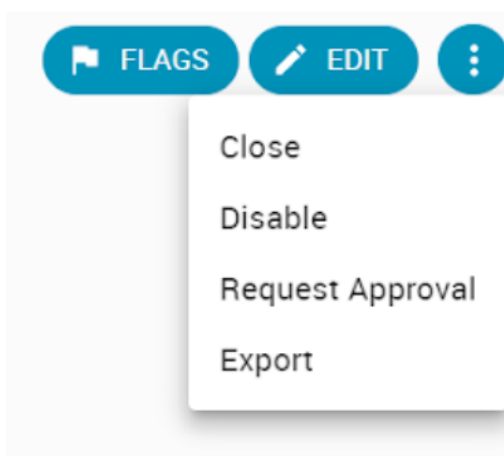
Approvals

Requesting Approval for a Form

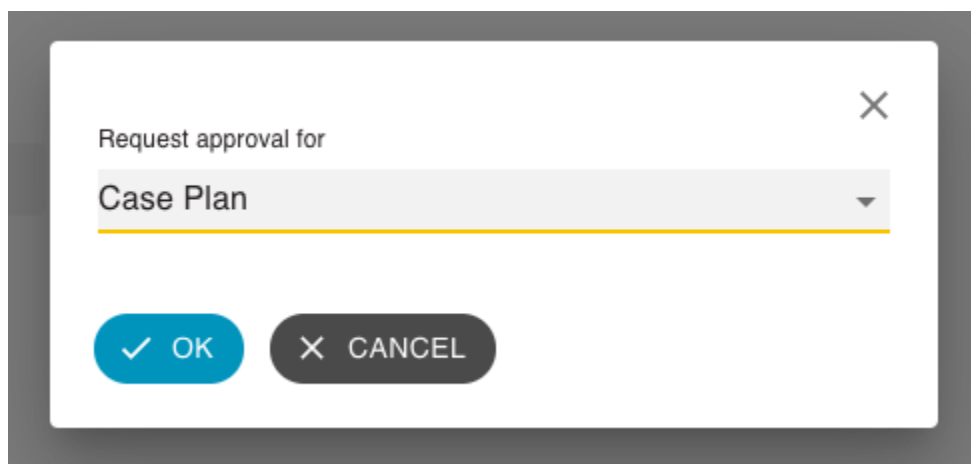
Case workers can request a manager's approval on the following Case forms:

- Assessment
- Case Plan
- Closure

To request approval for one of these forms, click the **Request Approval** action in the Actions menu.

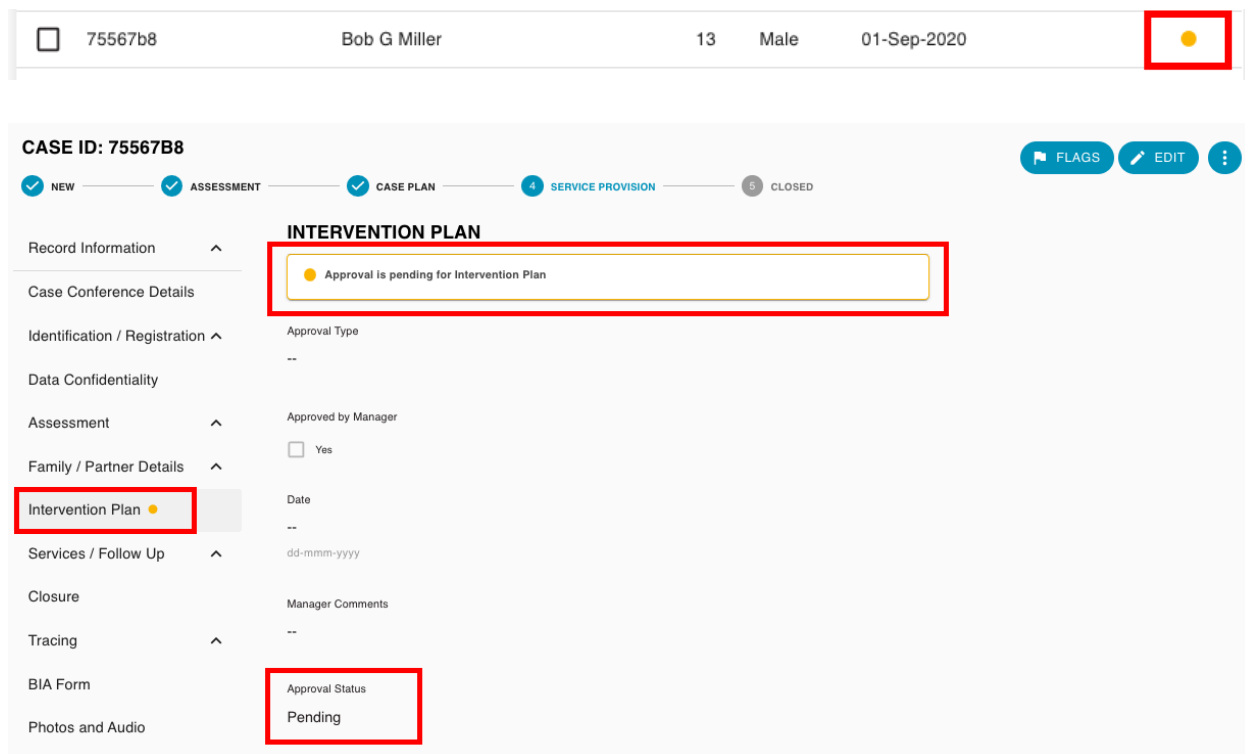


The below modal will appear. Select the form for which you would like to request approval, then click "OK." In the example here, the user has selected approval for the Case Plan form.



A modal window titled "Request approval for" with a close button (X) in the top right corner. Below the title is a dropdown menu currently showing "Case Plan". At the bottom of the modal are two buttons: a blue button with a checkmark and the text "OK", and a grey button with an X and the text "CANCEL".

Once you have requested approval, you will notice that an alert appears on the link to the corresponding form on your Case's Form Navigation Menu (in our example, this would be the "Case Plan" form). Click into this form. Note that there is an alert message at the top of the form. Also, note that the "Approval Status" field is set to "Pending." This means that you are still waiting for your manager to either approve or reject the form.



The interface shows a case record for "75567b8" by "Bob G Miller" with details "13 Male 01-Sep-2020". A red box highlights a yellow dot icon in the top right corner of the case header.

Below the header, the "CASE ID: 75567B8" is displayed. A progress bar shows the case status: NEW (checked), ASSESSMENT (checked), CASE PLAN (checked), SERVICE PROVISION (4, highlighted), and CLOSED (5). Action buttons "FLAGS", "EDIT", and a menu icon are on the right.

The left sidebar lists various sections: Record Information, Case Conference Details, Identification / Registration, Data Confidentiality, Assessment, Family / Partner Details, Intervention Plan (highlighted with a red box and a yellow dot), Services / Follow Up, Closure, Tracing, BIA Form, and Photos and Audio.

The main content area is titled "INTERVENTION PLAN". A red box highlights a yellow dot icon and the text "Approval is pending for Intervention Plan". Below this, the "Approval Status" field is set to "Pending", also highlighted with a red box.

Now, click into the "Record Information" section of the Form Navigation Menu. Click "Approvals". Here, you will see a list of all approval requests and approvals made on your Case. The approval request you just submitted should appear here.

Now, go to your dashboard. In the "Approvals" section, your case will now be counted as "Pending" in the column for the form where you requested approval (in our example, this is "Case Plan").

Approving or Rejecting a Form

Managers will also have the ability to approve or reject certain Case forms. Once again, these are:

- Assessment
- Case Plan

- Closure

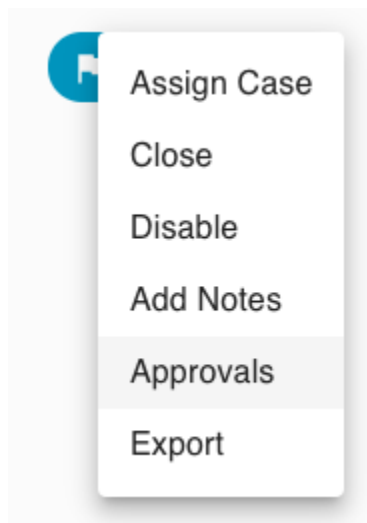
A manager can check for pending approvals in the "Approvals" section of their dashboard.

APPROVALS		
2 SER	4 CASE PLAN	0 CLOSURE
2 Pending	0 Pending	0 Pending
0 Rejected	0 Rejected	0 Rejected
0 Approved	4 Approved	0 Approved

The numbers here represent the number of Cases with pending approvals for each approvable form.

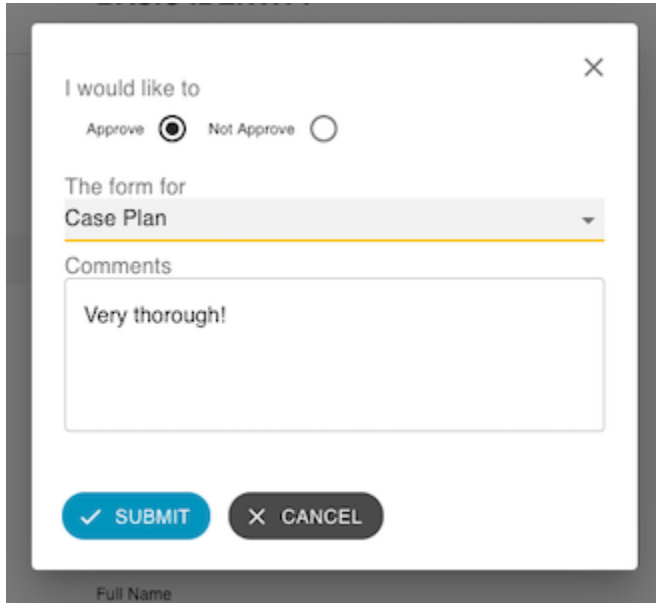
Using our previous example, if a manager clicks on the number for "Case Plan," they will arrive at a list of Cases with pending Case Plan approval requests. Clicking into one of these Cases, they will see an alert on the Case Plan form in the Form Navigation Menu. The manager can then click into the Case Plan form, read through the Case Plan that the case worker has recorded, and decide whether to approve or reject it.

To approve or reject the Case Plan, the manager clicks the **Approvals** action in the Action Menu.



In the modal that appears, the manager can select "Approve" to approve the Case Plan, or "Not Approve" to reject it. Note that the manager can also use the "The form for" dropdown to select a different form to approve. The manager can also leave a comment

on their decision, which will appear both on the approved / rejected form and in the Approvals form.



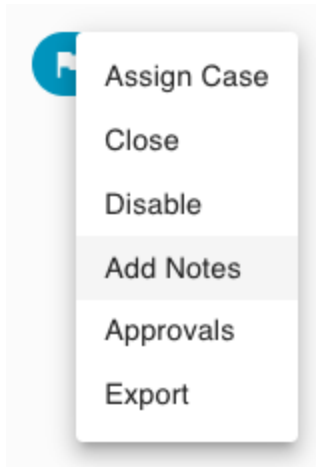
Once a manager has approved or rejected the Case Plan, the "Approval Status" on that form will update to be either "Approved" or "Rejected." The alert will also disappear from the "Case Plan" form. For both the case worker and the manager, the "Approvals" section of the dashboard will show one less pending Case Plan approval. In the "Approvals" section of the case worker's dashboard, the number for "Approved" or "Rejected" Case Plans will have increased by one, depending on how the manager responded.

Add Notes

Case workers are able to add notes to a case record. Managers overseeing a team of case workers may want to add notes to a particular Case so that they can give the case worker guidance on case management.

NOTE: This action is particularly useful for managers who do not have the ability to edit Cases. If managers do have the ability to edit Cases, they can always add a note by editing the case, going to the Notes form, and adding a subform entry.

To add a note, in the Actions menu, click the **Add Notes** action.



A modal will appear. Here, you can write the subject of your note, as well as its full text. Click **SAVE** to add the note to the case.

When the case worker logs in and views this case, an alert will appear on the link for the Notes form in the Form Navigation Menu.

CASE ID: KDMA/04/20/9425D97

1 NEW 2 ASSESSMENT 3 CASE PLAN 4 SERVICE PROVISION 5 CLOSED

Record Information ^

Case Conference Details

Identification / Registration ^

Data Confidentiality

Assessment ^

Family / Partner Details ^

Intervention Plan

Services / Follow Up ^

Closure

Tracing ^

BIA Form

Photos and Audio

Other Documents

Notes ●

NOTES

● Notes was updated on 03-Oct-2020

Notes

Need to follow up · primero_mgr_cp >

If the case worker then clicks on the form, they will be able to see the manager's note, including the subject, full text, the manager's username, and the date the note was added.

NOTES

● Notes was updated on 03-Oct-2020

NOTES

×

Date

03-Oct-2020 02:58

dd-mmm-yyyy

Subject

Need to follow up

Notes

You should follow up with this child and check on his home condition.

Manager

primero_mgr_cp

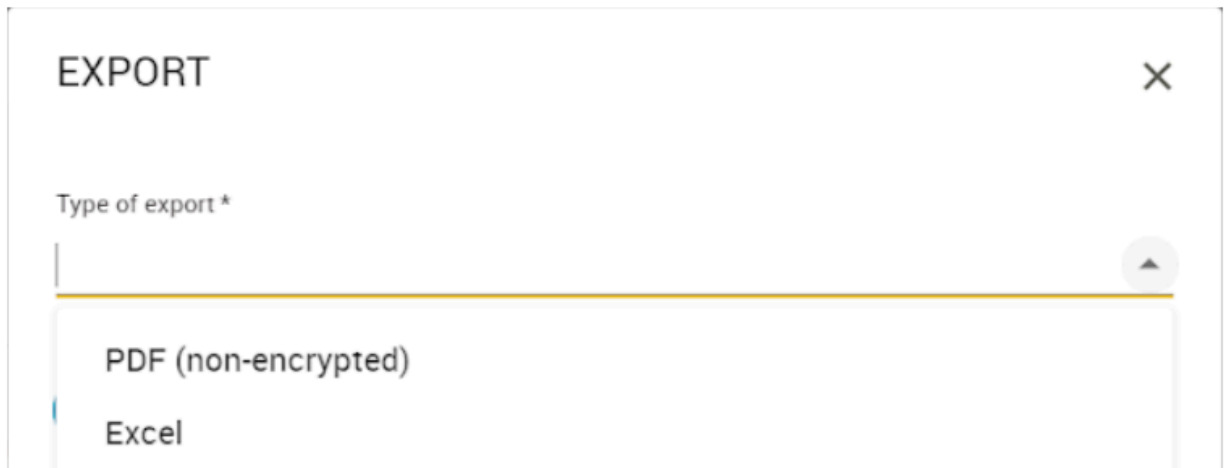
The alert will disappear once the record owner edits the case.

Exporting Information on Records

Primero allows users to export information about records in a number of formats. Users can export information from the View Record or Record List pages. In order to print information, you must use the export option which will download to your device.

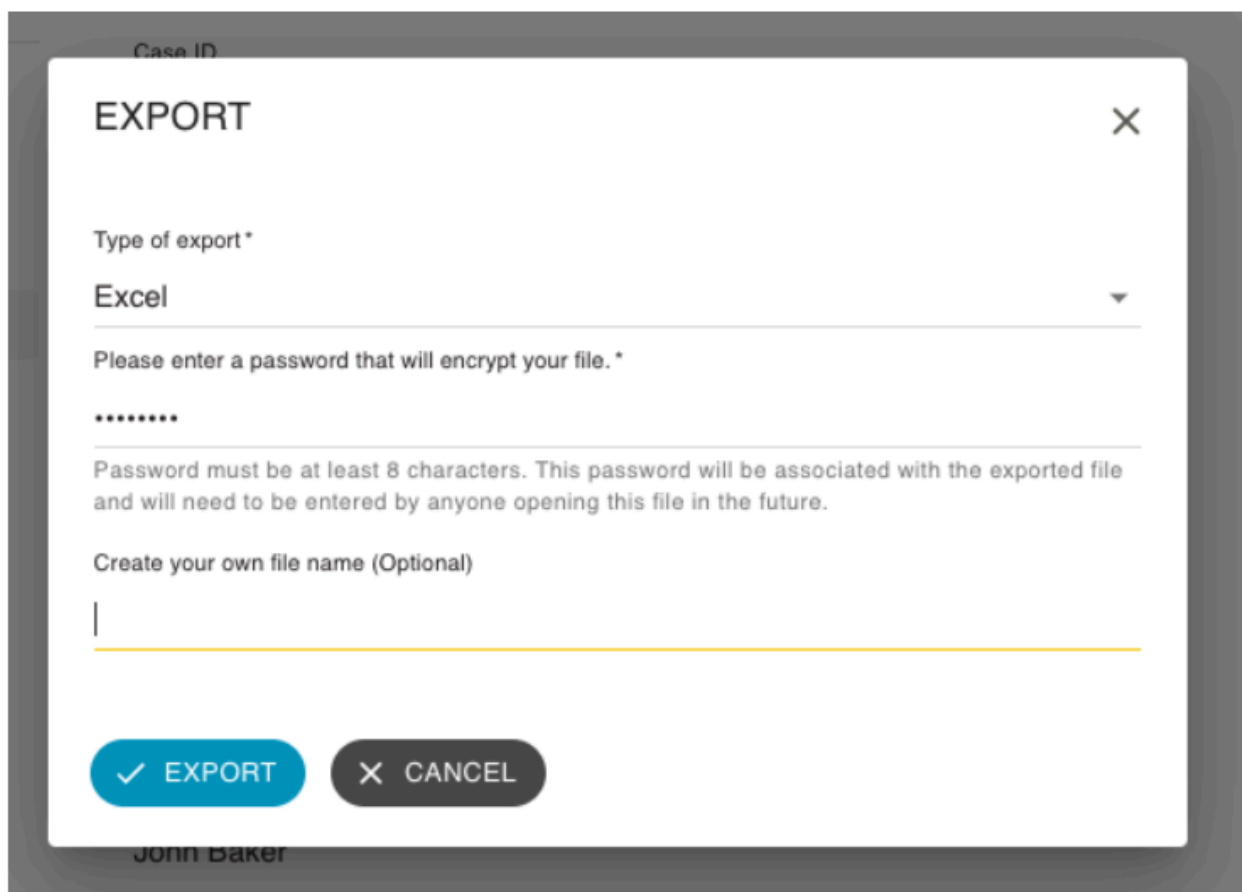
Format	Description	Fields Included
Excel	Exports to a standard .xls file. Each form gets its own tab in the file.	All fields to which the user's role has access.
CSV	Exports to a standard CSV file. Note: if there is a language being used and it does not use Latin characters (e.g. Arabic, Kurdish, Thai) then you will need to convert the file to UTF-8 format. Follow instructions found here: https://community.primero.org/t/export-csv-does-not-format-data/471	All fields to which the user's role has access.
PDF	PDF file which displays data as it appears in Primero. Not available from the list view. Does not support encryption.	Fields on all forms specified by the user, to which the user's role has access.
Duplicate	The duplicates are identified if a "national ID" type of field has the same values. Note: the search can be configured to not be duplicate based on National ID but another ID such as a household number, etc.	National ID No, Child Name, ProGres ID (UNHCR Number), Age, Family Size, Case ID. Note: The duplicate report presents these other data points for validation, but the report does not compare these data points.
Custom (Only for managers)	Excel file containing all the fields specified by the user.	All fields specified by the user, to which the user's role has access.

To export one or more records, in the Actions menu, click **Export**. A modal will appear. You will see a dropdown labelled "Type of export." Click into this dropdown and select an export format.



The screenshot shows a modal window titled "EXPORT" with a close button (X) in the top right corner. Below the title is a label "Type of export *" followed by a dropdown menu. The dropdown is open, showing two options: "PDF (non-encrypted)" and "Excel". The "Excel" option is currently selected and highlighted.

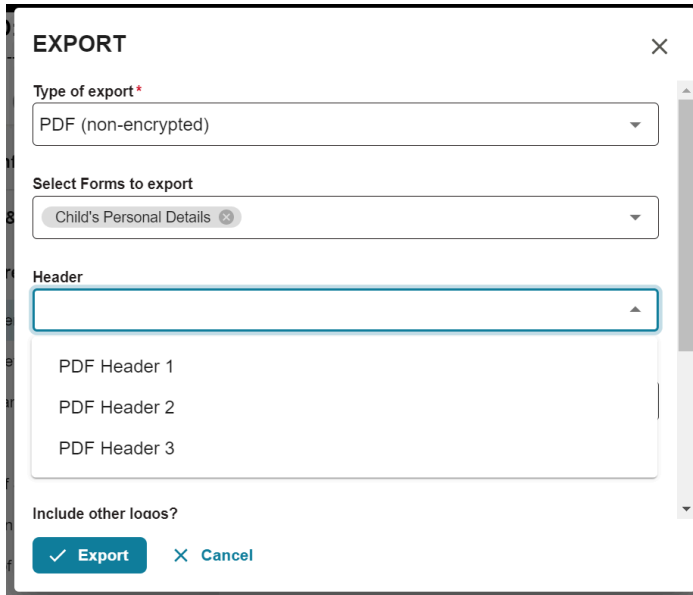
Depending on the format you choose, you may then be able to select forms and fields to export, specify a file name, and choose a password to encrypt your export file.



This screenshot shows the "EXPORT" modal with the "Type of export" dropdown set to "Excel". Below this, there is a text prompt: "Please enter a password that will encrypt your file. *". Underneath is a password input field filled with dots. A note below the field states: "Password must be at least 8 characters. This password will be associated with the exported file and will need to be entered by anyone opening this file in the future." Below the password field is a text input field with the label "Create your own file name (Optional)". At the bottom of the modal are two buttons: a blue button with a checkmark and the text "EXPORT", and a grey button with an 'X' and the text "CANCEL".

PDF Exports

If you choose a PDF export, you can also add in a header, logo or signature to appear on the PDF. Your administrator will be able to change the type of headers that you see and these headers will appear at the top of the PDF export:



EXPORT

Type of export*

PDF (non-encrypted)

Select Forms to export

Child's Personal Details

Header

PDF Header 1

PDF Header 2

PDF Header 3

Include other logos?

✓ Export X Cancel

For instance, if PDF Header 1 is selected it will appear at the top of the PDF. You can create a title of the PDF which will appear under the header:

Case ID: 794d405
Printed: 18-Apr-2022

PDF Header 1
Test

unicef 

You can also make a custom header by entering the text of the header you want to appear at the top of the PDF:

EXPORT

×

Type of export*

PDF (non-encrypted)

Select Forms to export

Child's Personal Details

Header

Custom Header

Add your customer header here|

☐ Include agency logo?

Include other logos?

✓ Export

✕ Cancel

You can also include signature lines for the case worker, client or recipient which will appear at the bottom of the PDF export:

EXPORT

×

Custom Header

☐ Include agency logo?

Include other logos?

Include signature lines for

Recipient

Case Worker

Client

✓ Export

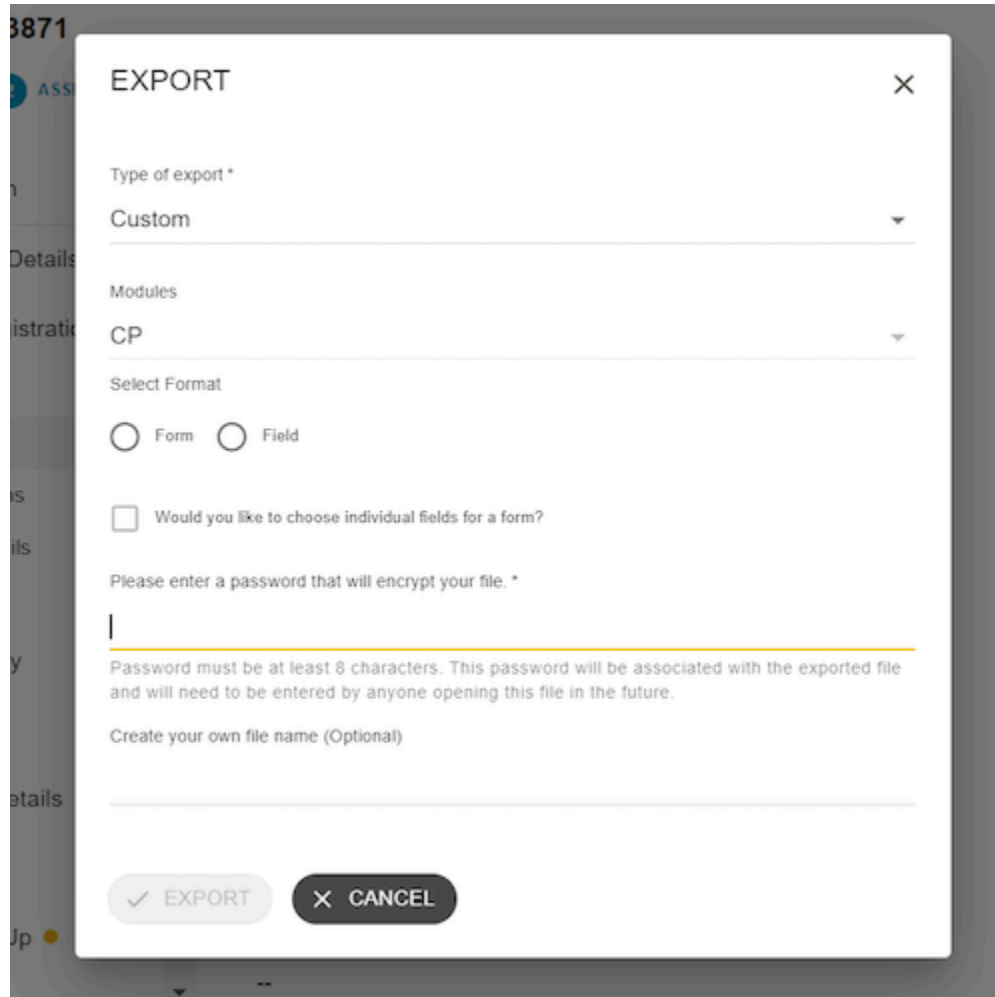
✕ Cancel

Once selected this will appear at the bottom of the PDF:

Caseworker Name	Date
Caseworker Agency	

Custom Exports

If you are a manager, you will be able to generate a custom export. Select **Custom** as your export type, you will see the below fields appear in the Export modal.



There two formats for the Custom export are:

- *Form* - The user selects a list of forms or a list of fields to include in the export. Primero exports an Excel file with a *tab* for each *form* included in the export.
- *Field* - The user selects a list of fields to include in the export. Primero exports an Excel file with *one tab*, which includes all exported fields.

If you select "Form" as your format, a checkbox appears with the label "Would you like to choose individual fields for a form?"

- If you leave this un-checked, you will choose a list of *forms* you would like to include in the export file. All fields on these forms will be included.

- If you check this box, you will choose a list of individual *fields* to include in the export file. In the Excel file Primero exports, the fields you choose will be organized by form, so that each form gets its own tab.

CP

Select Format

☒ Form
 ☐ Field

☐ Would you like to choose individual fields for a form?

Select Forms to export

Duplicate Exports

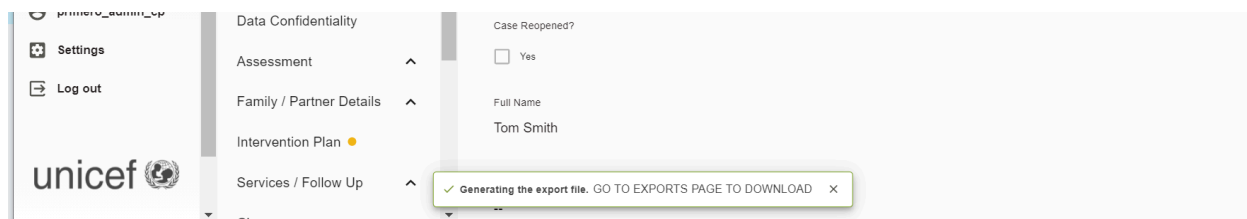
The duplicates are identified if a “national ID” type of field has the same values. Once the export is generated, the export will list: National ID No, Child Name, ProGres ID (UNHCR Number), Age, Family Size, Case ID. The duplicate report presents these other data points for validation, but the report does not compare these data points.

	National ID No	Child Name	Progress ID	Age	Family Size	Case ID			
1	1237	Kel, Wal Nin	664-00001237	13		6640621e-f9ed-496a-9ebe-5db3e5347964			
2	1237	Kel, Wal Nin	664-00001237	45		4a4921ec-3197-4d03-aa7d-7b35bff56843			
3	1237	Kel, Wal Nin	664-00001237	45		c03a0675-2554-4018-b7b0-03443b0788f4			
4	1237	Kel, Wal Nin	664-00001237	13		5050efa8-2d1f-4e5f-9b75-0465602ec6cb			
5	1237	Kel, Wal Nin	664-00001237	45		012581f6-32d9-4441-ba92-5ef988410666			
6	1237	Kel, Wal Nin	664-00001237	45		9891dc22-4fde-440a-85cd-8199b823cdd4			
7	987745325	Bum, Chiang Puk	284-0009765	30		69aa0230-539f-45d3-b8ac-48dac47a6269			
8	987745325	Bum, Chiang Puk	284-0009765	30		ebbd4b45-b75c-474c-a473-df7382eb11bf			
9	987745325	Bum, Chiang Puk	284-0009765	30		2212bf65-0fb8-4b54-be60-3b11caa4abf3			
10	987745325	Bum, Chiang Puk	284-0009765	16		00e4dccc-e06c-4d98-9284-cc346707fcb			
11	987745325	Bum, Chiang Puk	284-0009765	16		4df37bfa-8442-4ece-add4-819a0b038d1d			

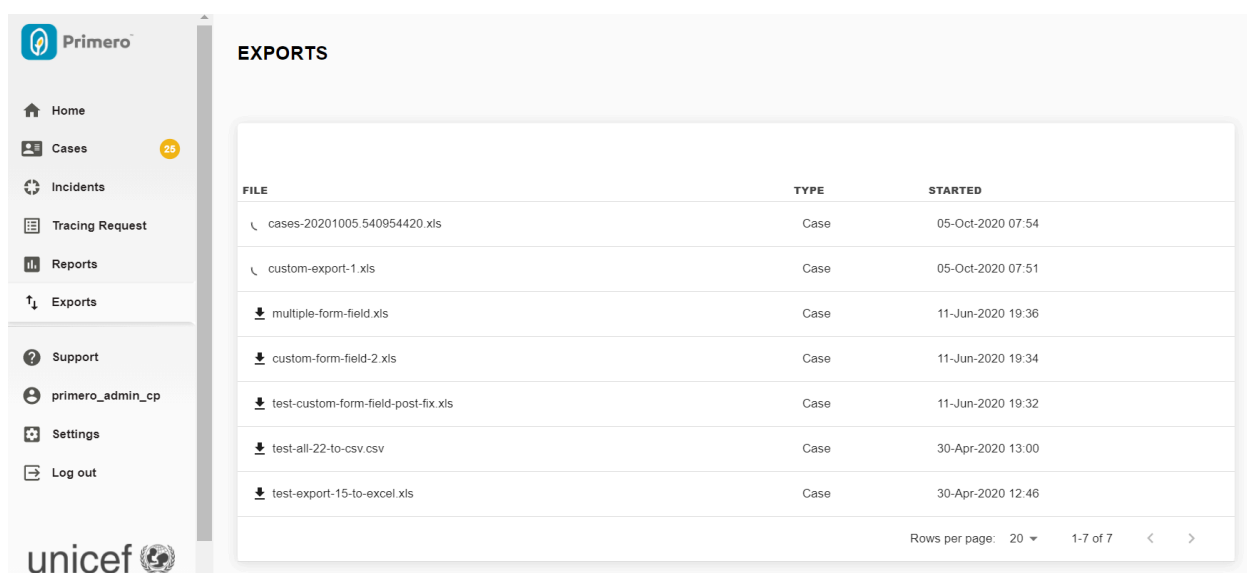
Note: the search can be configured to not be duplicate based on National ID but another ID such as a household number, etc.

Downloading Exports

To create the export file, click **Export**. A notification will appear with a link to the Exports page. Click on this.



You will now arrive at the Exports page. You can always access the Exports page by clicking the **Exports** link in the Navigation Menu. Here you will see a list of all of the exports you have created. When Primero is still loading an export, you will see a "loading circle" spinning next to it. If an export is ready to download, you will see a "download" icon next to it. Click on an export in the list to download the file.



NOTE: PDF exports do not appear on the Exports page. Instead, these download automatically once you submit your export.

Services

Case workers can plan, document, and refer for services using the **Services** form.

Services Form

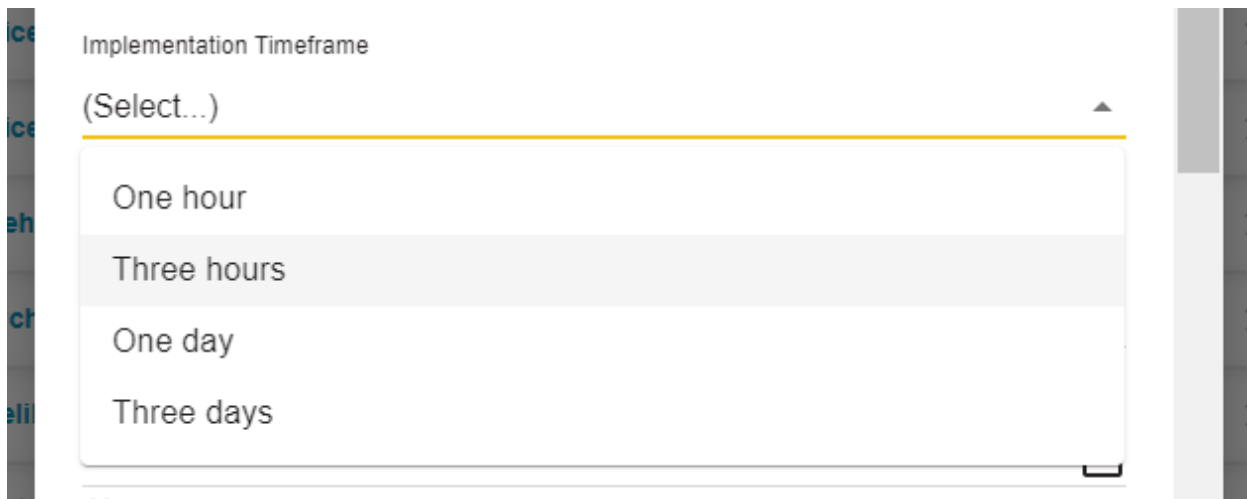
To add a service to a Case, go to the **Services** form, and click the "Add" button. A modal will appear. configuration.

The first two fields on the subform provide information about the type of service you are providing, and in which part of the case management workflow it belongs.

- **Type of Response** - This field is a *general* category for the service and the only option for this field will be "Service Provision". When you add a service to a Case, the Workflow Status is set to be the Response Type of the most-recently-added service. For instance, if a user adds a service with a Response Type of "Service provision" the Workflow Status will be set to "Service Provision."
- **Type of Service** - This is the *specific* type of service being provided (example: "Medical Examination" or "Psychosocial Counseling"). When you enter a value in this field, Primero uses it to search for Agencies and Users capable of providing the chosen service type.

Setting a Due Date - Each service has a due date, which will appear on your service's Task in the Tasks list page. The below two fields will set the service's due date:

- **Implementation Timeframe** - When you select an option in this dropdown, Primero sets a due date based on the selected timeframe and the current date. For instance, if you select a timeframe of three days on October 8, your service's due date will be October 11.

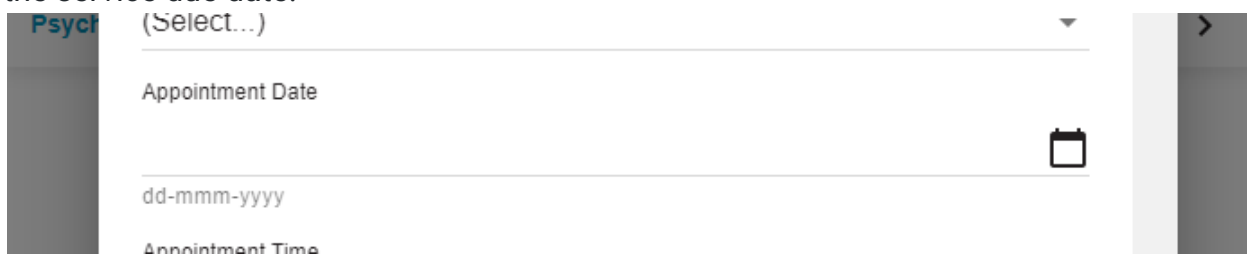


Implementation Timeframe

(Select...)

- One hour
- Three hours
- One day
- Three days

- **Appointment Date** - In some configurations, selecting an Appointment Date sets the service due date.



Psych (Select...)

Appointment Date

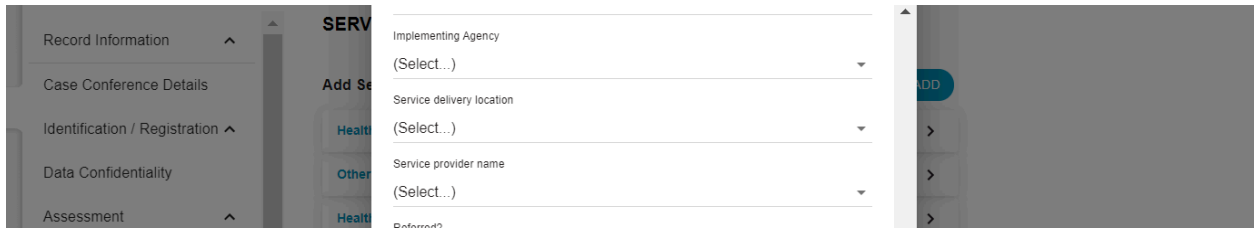
dd-mmm-yyyy

Appointment Time

Referral information (internal) - If another user in Primero will be providing this service, fill out the below fields to start the process of referring your Case to that user.

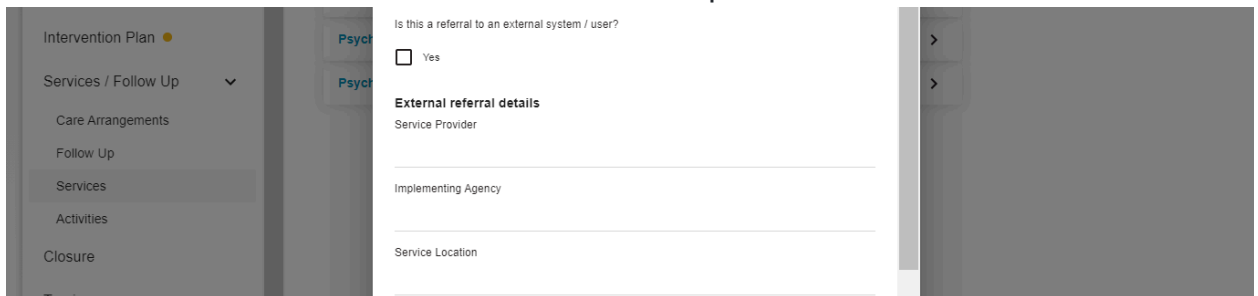
- **Implementing Agency** - The Agency which will be providing the service. The dropdown will only display Agencies which are able to provide the type of service you entered in the **Type of Service** field (see above).
- **Service delivery location** - Location where you would like the service to occur. To find a location in the dropdown, start typing the location's name; Primero will update the options to show all locations which match the name you have entered. Selecting a location here will narrow down which Users appear in the **Service Provider Name** field (see below).
- **Service Provider Name** - This the Primero User who will perform the service. The options in this dropdown will be all Users who are able to perform the selected **Type of Service**, belong to the selected **Implementing Agency**, and are in the selected **Service delivery location**. When you refer the case for this service,

this User will gain temporary access to the Case.



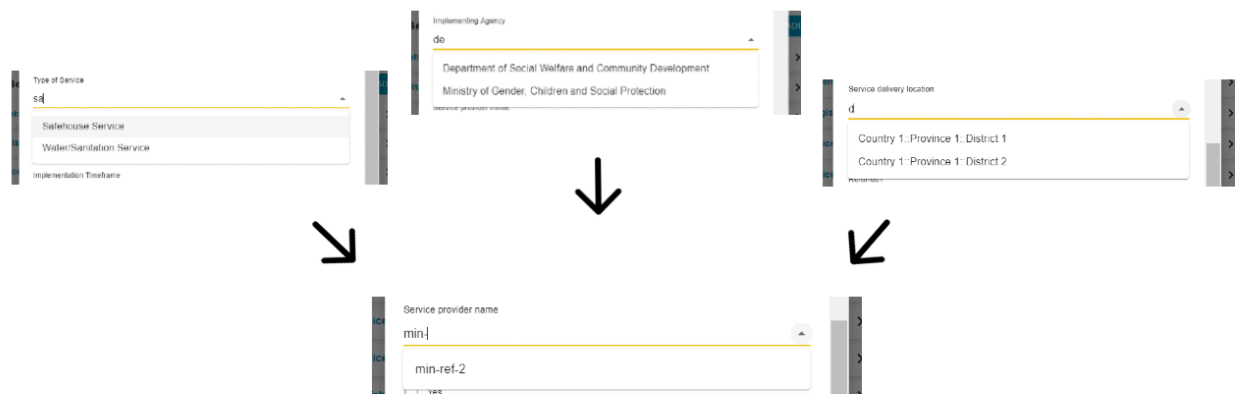
Referral information (external) - If an individual or organization who does not use Primero will be providing the service, fill out the below fields.

- **Is this a referral to an external system / user?** - Check this box to indicate that this service will be provided by an individual or organization not using Primero. Checking this box also allows you to perform an **External Referral** for this service.
- **Service Provider** - Name of the individual who will provide the service.
- **Service Provider** - Agency or organization who will provide the service.
- **Service Location** - Place where the service will be provided.



Marking a service as implemented - The two fields below indicate whether and when the service was implemented.

- **Service implemented** - This field is disabled and the user cannot edit it. Any service saved to a Case gets a value of "Not Implemented" in this field by default. To change this field's value to "Implemented," fill out the "Service Implemented On" field (see below). Once all services on a case are marked as "Implemented," the Case's Workflow Status will update to "Service Implemented". This means this should only be completed after the service has been implemented.
- **Service Implemented On** - When the user fills out a date and time in this field and then saves their Case, the "Service implemented" field (see above) is set to "Implemented."



Referring from Services Form

Once you have saved the case with this new service, go to the **Services** form and the service you just added. A **Refer** button will appear on your service if:

- You have filled out the the **Type of Response**, **Type of Service** and **Service Provider Name** fields for your service.
- *Or*, you have selected the **Is this a referral to an external system / user?** checkbox.

Note that, if you have already referred a service, the **Refer** button will allow you to refer the service a second time, and will read **Refer Again**.

Click on the **Refer** button, and a modal will appear. Note that the information you have already entered about the **Type of Service**, **Implementing Agency**, **Service delivery location** and **Service Provider Name** are already filled in for you. Remember to ensure that your case has provided consent for the referral.

REFERRAL CASE BDF3871

Service
Safehouse Service

Agency
Ministry of Gender, Children and Social Protection

Location
Country 1::Province 1::District 1

Recipient*
min-ref-2

Notes

✓ REFER X CANCEL

If you selected the **Is this a referral to an external system / user?** checkbox, the values you entered for **Service Provider**, **Service Provider**, and **Service Location** will appear in the referral modal.

REFERRAL CASE BDF3871

☒ Are you transferring to a remote system?

Type of Recipient*

Service
Safehouse Service

Agency
An agency that does not use Primero

Location
Zarqa

Recipient
Individual outside of Primero

Notes

✓ REFER X CANCEL

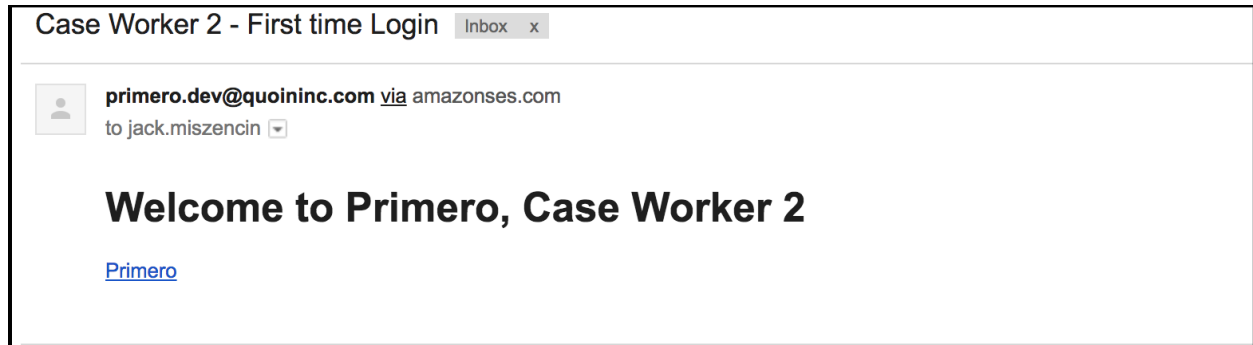
Notification Emails

Users may receive notification emails that either welcome them to the application, or alert them to changes to their cases. The following users will receive emails in the following circumstances:

- Managers whose case workers have requested approval for case plans, closures, etc.
- Case workers whose managers have responded to approval requests for case plans, closures, etc.
- Users who have received a case transfer
- Users who have received a case assignment
- Users who have received a case referral

Welcome emails will look something like the below message. If the new user clicks the "Primero" link in the message, they will be sent to the system login screen. Once again,

users will only receive welcome emails if the system has been configured to send them, and if the user in question has been set up to receive them.

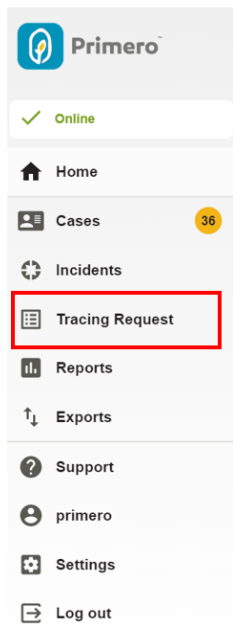


For more information on how turn welcome and notification emails on or off in the system's configuration, please see the **Primero Administration and Configuration Guide**.

Tracing Requests

Tracing Requests

If your user is configured for tracing activities, you should have access to **Tracing Requests**, and you should see the "Tracing Requests" link in the navigation bar at all times.



If you click on this link, you will see a list of all the tracing requests you have access to. Click "New" to begin tracing.

The image shows the 'Tracing Requests' page. On the left is the same sidebar as in the previous image, with 'Tracing Request' selected. The main content area has a title 'Tracing Requests' and a '+ New' button (highlighted with a red rectangle). Below the title is a table with columns: ID, Name of Inquirer, Date of Inquiry, and Tracing Requests. The table contains five rows of data. To the right of the table is a search bar and a filters section with buttons for 'Apply', 'Save', and 'Clear'.

ID	Name of Inquirer	Date of Inquiry	Tracing Requests
92ada57	INQ-BROTHER updated	2021-10-07	childftrcase1, childftrcase2
fae0343	mothercase1	2021-10-06	ftrCase1, test2, testcase
b9c916e	Oct5Inquirer	2021-10-06	OCT5, oct4
848ee72		2021-07-14	Kalyan
e4584d4	trace2	2021-06-21	sadasdasd, sadasdasd

First, you will fill out the "Inquirer" form. This contains information on the parent or guardian who has initiated tracing. Primero will use much of the information in this form to search against information recorded about family members in each case's "Family Details" subform entries. So, for instance, if a child's mother, named "Yasmin," is the inquirer, Primero will search for cases with a family member whose relationship to the child is recorded as "Mother", and whose name is "Yasmin."

Tracing Request ID 5adc424

Record Information

Inquirer

Tracing Request

Photos and Audio

Inquirer Details

Name of inquirer
Yasmin Abbas

Nickname of inquirer

Age
41

Date of Birth
01-Nov-1979

Language
Select all that apply

Next, you will fill out information on the child by filling out a subform entry in the "Tracing Request" form. Primero will use the information here to search for cases with similar attributes. So, for instance, if the father mentioned above is looking for a daughter named "Nadia," who is 15 years old, Primero will search for cases with the name "Nadia" and an age of 15.

TRACING REQUEST

Matched Case ID

Tracing status
Open

Individual Details

Name
Nadia Abbas

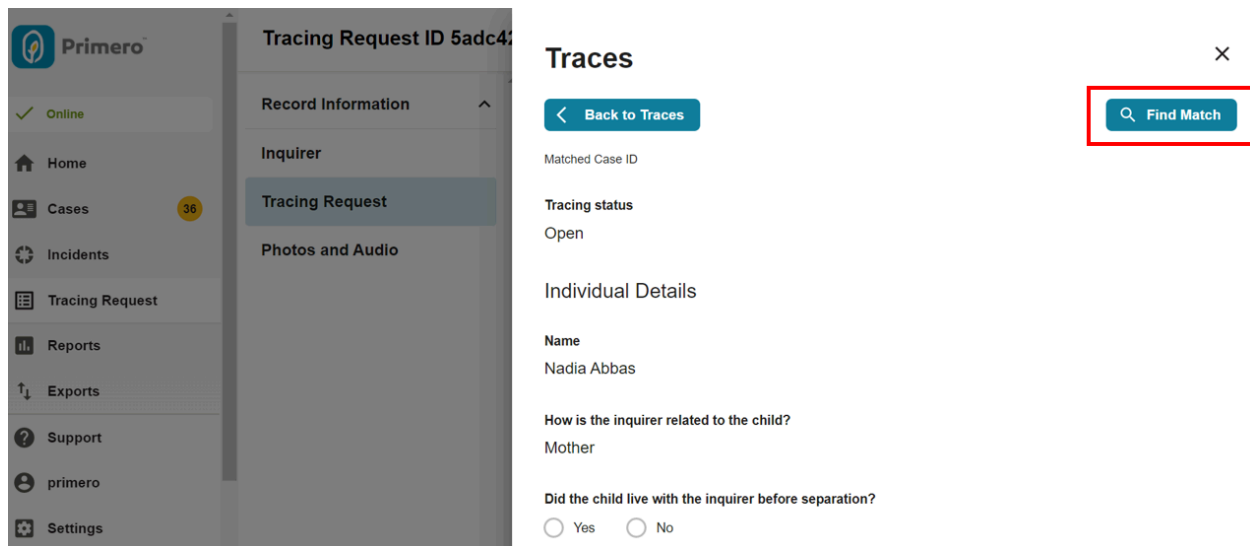
How is the inquirer related to the child?
Mother

Did the child live with the inquirer before separation?
☐ Yes ☐ No

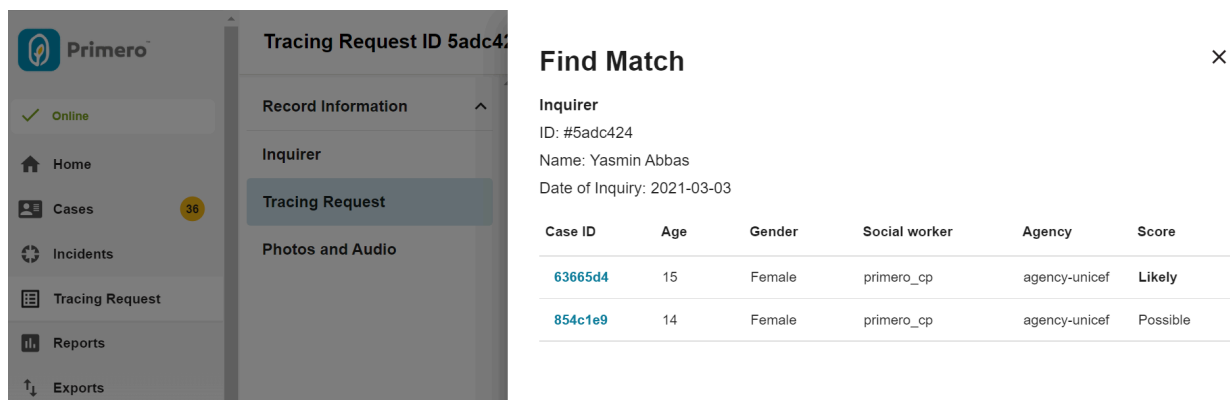
Update Cancel

Matches

Once you have saved the tracing request and you are in *Edit* mode, you can click on "Nadia" and will see a "Find Match" link at the top of your "Tracing Request" slider.



If you click on this link, you arrive at a page which displays a number of cases which are potential matches for your tracing request. This list will contain the case's ID, the record owner's user name, the record owner's agency, the approximate likelihood of the case being the right match (either "Possible" or "Likely"), and (depending on your user's configured permissions) a link which displays the *View Details* modal (See "Viewing Record Details" section above).



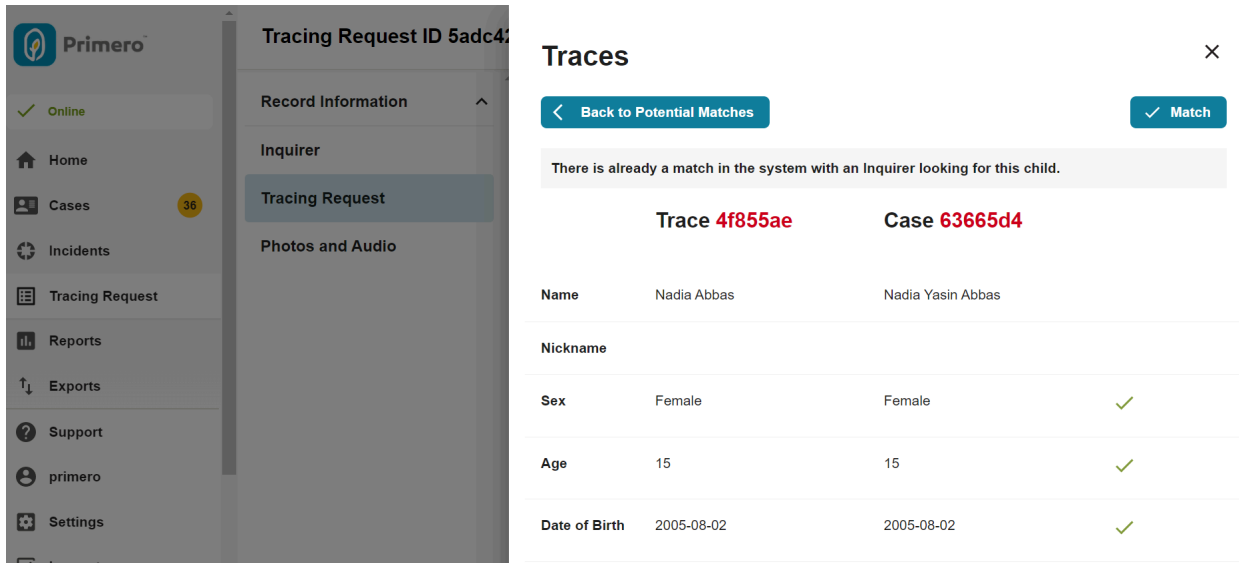
The records provided as potential matches are based a scoring system that weight many attributes as detailed in the scoring section below.

Scoring

Primero gives potential matches a score based on how similar they are to the tracing request *compared to other potential matches Primero has found*. This means that, if scoring were done on a 1-10 scale, the lowest potential match in a list would get a score of 1, the highest would get a 10, and the median match would get a 5. A high scoring match Primero will record as "Likely" and a medium-to-low scoring match, Primero will record as "Possible."

When looking at the potential matches for your tracing request, you can see which case attributes matched your tracing request by clicking on the score label (Likely or Possible). This will reveal a modal which compares a number of case attributes side-by-side with the attributes you gave your

tracing request. Attributes which are the same get a '✓', attributes which are different get a red 'X', and attributes which were left blank on both the case and the tracing request get a '-'.



The screenshot shows the Primero application interface. On the left is a sidebar with navigation options: Online, Home, Cases (36), Incidents, Tracing Request, Reports, Exports, Support, primero, and Settings. The main panel is titled 'Tracing Request ID 5adc4...' and contains sections for 'Record Information', 'Inquirer', 'Tracing Request', and 'Photos and Audio'. A modal window titled 'Traces' is open, displaying a comparison between a 'Trace 4f855ae' and a 'Case 63665d4'. A notification at the top of the modal states: 'There is already a match in the system with an Inquirer looking for this child.' Below this, a table compares attributes:

	Trace 4f855ae	Case 63665d4	
Name	Nadia Abbas	Nadia Yasin Abbas	
Nickname			
Sex	Female	Female	✓
Age	15	15	✓
Date of Birth	2005-08-02	2005-08-02	✓

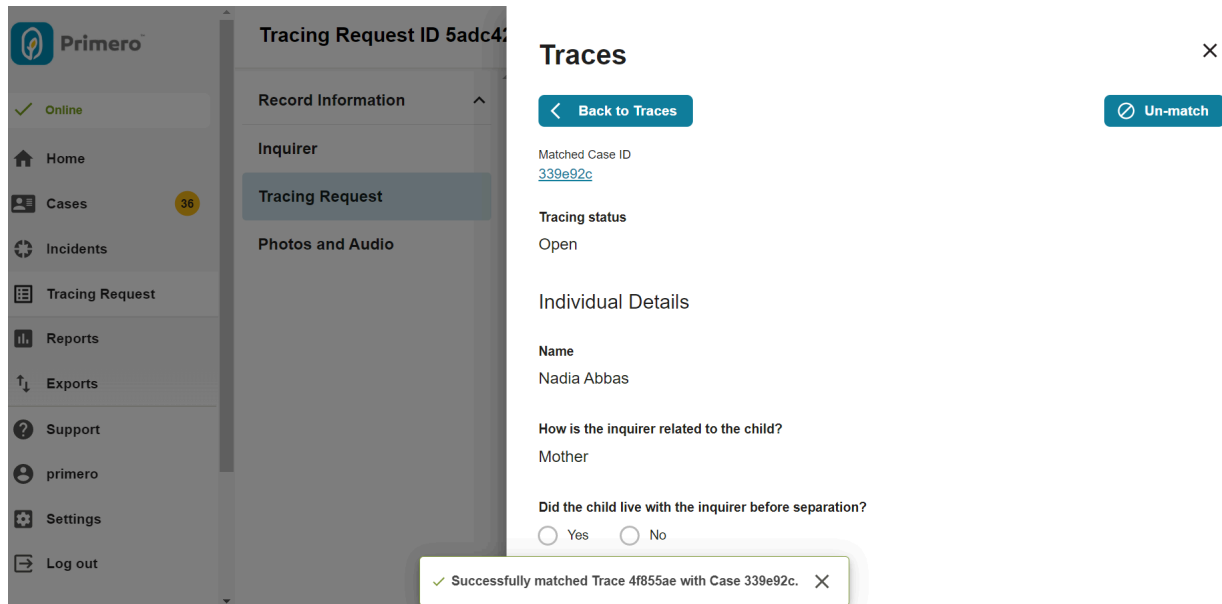
Linking Tracing Requests with Cases

Once you have identified a match which you think is the correct one, you can link this case to your tracing request, provided your user is configured to be able to see the case record in its entirety. At the top of the page, you should see a button that says "Match."

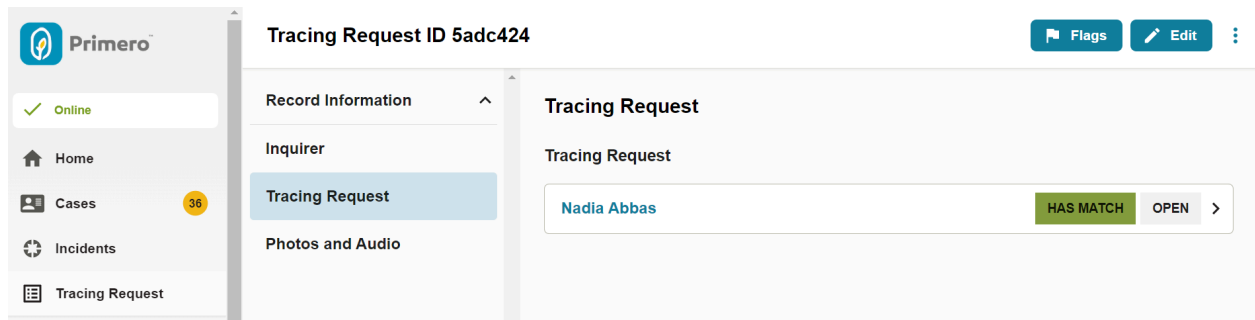


The screenshot shows the 'Traces' modal window. At the top left is a 'Back to Potential Matches' button. At the top right is a 'Match' button, which is highlighted with a red rectangular box. The 'Match' button contains a checkmark icon and the text 'Match'.

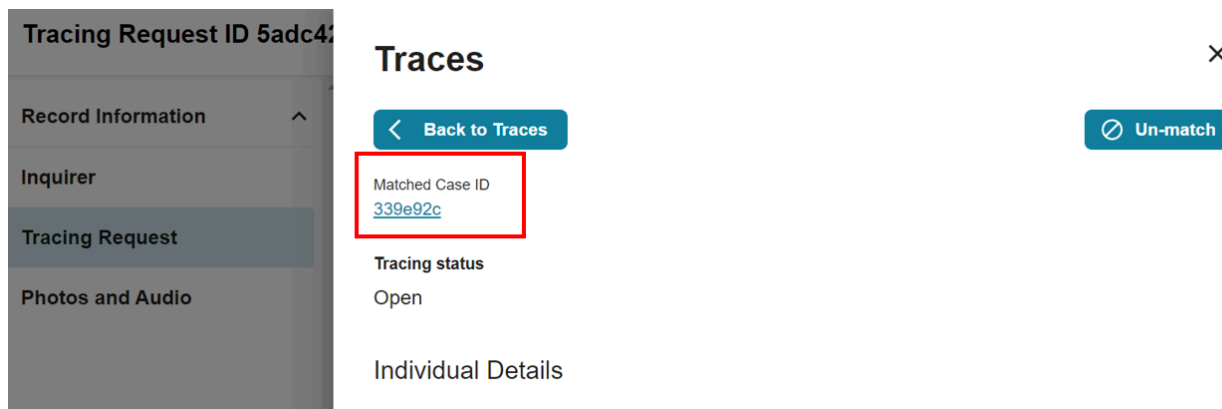
Click on this button to link the case to your tracing request. You should then see a notification at the top of the screen, indicating that your match succeeded.



Now, if you return to your tracing request's list of matches by hitting the back button, you will see that the entry for the case you just linked to your tracing request now has the label “Has Match”.



Similarly, when the user responsible for the case goes to the case's "Tracing and Separation Details" form, they will see a label marked "Matched tracing request," and to the right of this, a link to the tracing request which you created.



At this stage in the tracing process, the user who initiated the tracing request would manually contact the user and/or agency responsible for the case to initiate the verification and reunification process.

Initiating Tracing From a Case

Depending on the system's configuration, some users may also be able to search for matching tracing requests from the View Case page. A case must have indicated consent for tracing in order for a user to have access to this feature. This field will be found on the **Consent / Data Confidentiality** form.

Case ID: 63665d4 ✕ Cancel ✓ Save

1 New 2 Case Plan 3 Service provision 4 Review 5 Service Implemented 6 Closed

Record Information

Identification / Registration

Consent and Assent

Assessment

Case Plan

Case Conference Details

the case (e.g., name, photo, family details).

☒ Yes ☐ No

Consent has been obtained to disclose information for tracing purposes

☒ Yes ☐ No

If this field is 'No', the child's case record will not show up in Matches with Inquirer Tracing Requests.

The individual providing consent agrees to share information about this case with other service providers according to the details described below.

☒ Yes

This includes sharing information with other organizations providing services, this does not include sharing information with UNHCR.

Once you indicate that the child has given consent to share information for tracing and save the case, you should see a button marked **FIND MATCH** at the top of the Summary page, under the *Tracing* form group.

Case ID: 63665d4 🚩 Flags ✎ Edit ⋮

1 New 2 Case Plan 3 Service provision 4 Review 5 Service Implemented 6 Closed

Closure

Feedback

Tracing

Summary

Child's Wishes

Tracing

Verification

Reunification Details

Photos and Audio

Other Documents

Notes

Summary

Consent has been obtained to disclose information for tracing purposes

☒ Yes ☐ No

If this field is 'No', the child's case record will not show up in Matches with Inquirer Tracing Requests.

[See Data Confidentiality](#)

Does child want to trace family members?

☐ Yes ☐ No

Does the child want family reunification?

--

[See Child's Wishes](#)

🔍 Find Match

If you click on this button, you will arrive at a list of potentially matching tracing requests for your case.

Case ID: 63665d4

1 New

2 Case Plan

3 Serv

Closure

Feedback

Tracing

Summary

Child's Wishes

Tracing

Verification

Reunification Details

Photos and Audio

Other Documents

Notes

Find Match

×

Case

ID: #63665d4

Tracing Request ID	Name of Inquirer	date of inquiry	Trace	Score
d96ebfb	Yasmin Abbas	2021-03-03	Nadia Abbas	Likely
1167161	Mustafa Shatanawi	2021-03-03	Nadia Shatanawi	Possible
1167161	Mustafa Shatanawi	2021-03-03	Bob Barker	Possible

Registry

The registry feature is a type of complex lookup where users are able to search for a specific option which has multiple attributes linked to it.

For example, a look up of foster care providers could be “Hussein Nabulsi, Rania Hussein, Rabab and Hafar al-Tal, Raed and Nadia Osmani, Zahra and Muhammed Shatnawi, Nasim and Yasmin Nassir, Hussam and Zara Ashrafi”.

Each foster care provider is located in different parts of the city and has their own address and ID number. For example, “Hussein Nabulsi” is in 92 Sharia al-Qahira, Erbil, Iraq and has an ID number wya-2489192.

The registry tool allows programmes to manage lookups, such as the foster care providers who have various fields that further define the providers, linked together. This also allows users to search for a specific lookup.

In order to add a foster care provider, you will find the foster care subform:

Case ID: d552b2c

1 New

2 Assessment

3 Case Plan

4 Service provision

5 Service Implemented

6 Closed

Record Information ^

Identification / Registration v

Foster Care Provider

Interview Details

Child's Details

Care Arrangements

Family Details

Foster Care Provider

Add Foster Care Provider

+ Add New

! No Foster Care Provider found. This need to be added.

Select "Add New" and a slider will appear where you can search for the foster care provider you would like to add:

Search for

< Back to Case

Q Search

Search By

Name(s) of Foster Care Provider(s)

Name(s) of Foster Care Provider(s)

Hussein

Current Location

Iraq:Erbil:Erbil

You will be prompted to select the variable you want to search by. You will then fill your search query. Current location will also appear and you can search by location. The search will return results linked to the names entered:

Results

< Back to Search

id	Name(s) of Foster Care Provider(s)	Foster Care Provider's National ID Number	Current Location
1ef47ae	Hussein Nabulsi	wya-2489192	
844abb7	Rania Hussein	ngiw-4982	

1-2 of 2 < >

When you click search, you should see some results appear. Click the one you want. In this case, if the user selects "Hussein Nabulsi" they will be able to see additional details about Hussein:

Foster Care Provider

×

< Back to Results

✓ Select

Registry ID

1ef47ae

Registry Status

Registration Date

11-Nov-2022

Name(s) of Foster Care Provider(s)

Hussein Nabulsi

Foster Care Provider's National ID Number

wya-2489192

If there are more than two caregivers, provide only one of their national ID numbers.

Current Address

92 Sharia al-Qahira

Click “Select” if this is the option you would like to select. Once selected, the case is now linked to the foster care provider:

Case ID: d552b2c

×

 Cancel

✓ Save

1 New

2 Assessment

3 Case Plan

4 Service provision

5 Service Implemented

6 Closed

Record Information ^

Identification / Registration v

Foster Care Provider

Interview Details

Child's Details

Care Arrangements

Foster Care Provider

Add Foster Care Provider

1ef47ae • wya-2489192 • Hussein Nabulsi

>

If you want to deselect the provider and start over, click the foster care provider, then click the “Deselect” button.

Registry features work offline if you select the registry records and “mark for offline”:

Registry Records

4 registry record(s) selected

Rows per page 20

1-9 of 9

	ID	Name	Registry Number	Registration Date
☒	e2d848b	Rabab and Jafar al-Tal	tbwpq-23901	11-Nov-2022
☒	78c2c58	Raed and Nadia Osmani	nmvd-293812	11-Nov-2022
☒	ab5fe10	Zahra and Muhammed Shatnawi	iwow24980	11-Nov-2022
☒	c7122ad	Basim and Yasmin Nassir	weio-290240	11-Nov-2022
☐	141464d	Hussam and Zara Ashrafi	eiwuo-24890	11-Nov-2022

+ New

Mark for Offline

Search

Filters

Saved Searches

Apply

Save

Clear

Flagged

Status

Enabled / Disabled

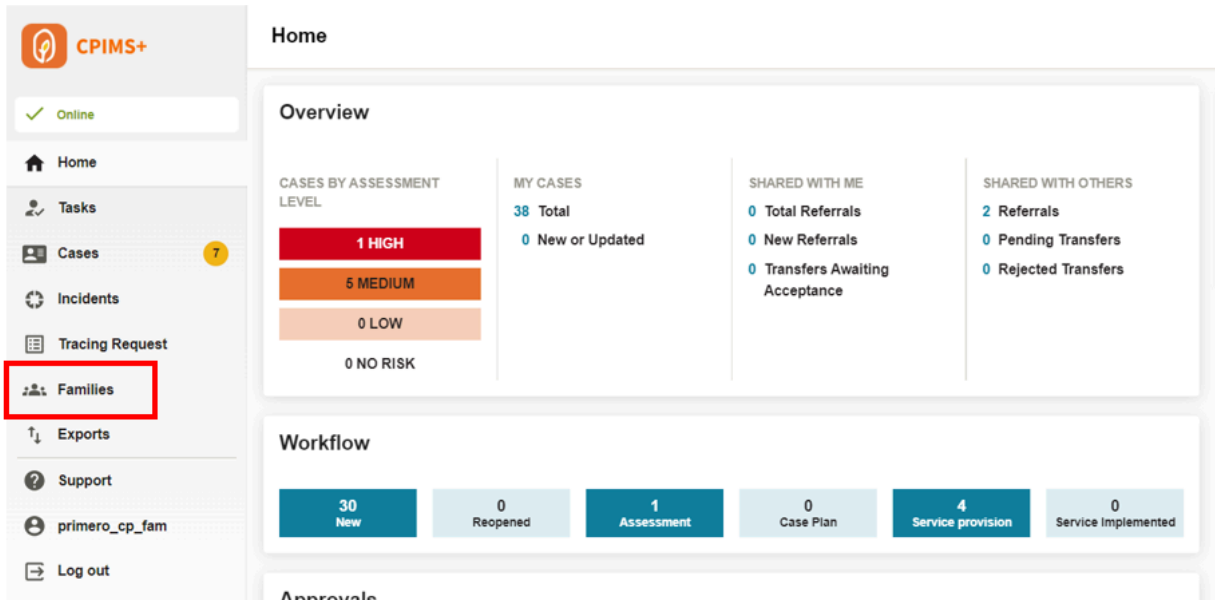
Enabled

Disabled

The registry feature is configurable to store any amount of information. This feature can be useful for national registries, family case management, alternative care providers, non-primero service providers and non-service provider organizations. It is currently not linked to reports or exports.

Families

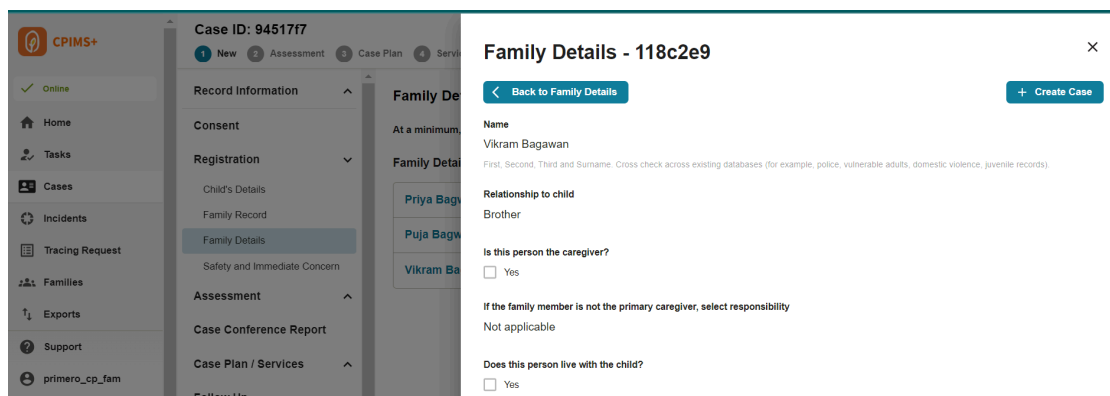
The families feature is a way to link family members within the system and update their information across case records in a centralized way. On the navigation, you can now see “Families” records.



Families can be created, viewed in a list, updated, exported, marked for offline, and searched for. In order to create a Family record, users can create from the Case or the Families. Users can create a case record for a sibling from a Child’s Case record, and can also create a case for a sibling from the Families record. These can be linked and unlinked as necessary using the instructions below. Family information is captured under the “Family Details” form within a Case record.

Creating a Case for a child’s sibling

Create a Case and add an entry representing a sibling in the “Family Details” subform. Save the Case. Now, in the Family Details subform, click into the sibling’s subform entry. Note that you can create a Case for the sibling.



Once you do this, the following will happen:

- A Case will be created for this family member.
- You will see a link appear on the subform slider, which will take you to the Case.
- The new Case record will have an entry in the “Family Details” subform for the original Case.
- A Family Record will be created; both Cases will be linked to the Family record.

Viewing information for a child’s Family Record

In the form navigation menu, click into the form group “Registration,” then click into the form called “Family Record.” You will see that a row appears for the new family which was created when you created the Case for your child’s sibling.

The screenshot shows the CPIMS+ interface for Case ID: 94517f7. The navigation menu on the left includes Home, Tasks, Cases, and Incidents. The main content area displays the 'Family Record' subform under the 'Registration' section. The subform includes a 'Family Record' section with a link to '8ffd89b'. The top of the interface shows a progress bar with steps: 1 New, 2 Assessment, 3 Case Plan, 4 Service provision, 5 Service Implemented, and 6 Closed. There are 'Flags' and 'Edit' buttons in the top right corner.

Click into the row, and a slider will appear. Click the “Family ID” link to go to the Family Record.

The screenshot shows a 'Family Record' slider with a 'Back to Case' button. The details include: Family ID (8ffd89b), Record Status (Open), Registration Date (04-Oct-2023), Family Name, and Father's Emirates ID Number. The slider is overlaid on the main interface, which shows the 'Family Record' section in the navigation menu.

Viewing all a Family’s Family Members

Once you click into the Family, take a look at the Family Members form. Notice how there are already two entries for the two Cases you created. Click into each Family Member. Note that each one has a link to that Family Member’s Case.

Updating information on the Family, adding Family Members

You can edit a Family Record the same way you would edit a Case.

- Edit the family and try updating some information, including “Family Name” and “Family Number.”
- In the Family Members form, try updating information about these Family Members, including the Name, Age, Sex, Date of Birth.
- Save your changes. Note that changes made in the Family Members subform entries will appear on the corresponding Family Details subform entries in Family Members’ Cases.

Create a Case for a Family Member

Edit the Family Record and go into the Family Members form. Add a new Family Member subform entry to represent another member of the family. Fill out all the fields, then save the Family Record. Now, click into the Family Member you just added, you will notice that there is a “Create Case” button.

The screenshot shows a web interface for editing a Family Member. On the left is a sidebar with a menu containing 'Family ID 8ffd89b', 'Family Overview', 'Family Members', 'Family Details', 'Family Documents', and 'Family Notes'. The main content area is titled 'Family Member - 4a9774f'. It includes a 'Back to Family Members' button and a 'Create Case' button, which is circled in red. The form fields include: Name (Kumar Bagwan), What is their role in the family? (Uncle), Is this person the caregiver for one of the children in this family? (Yes), and Notes on their role in the family.

Click this, then click “Create” in the confirmation modal. Primero will now create a Case for this family member.

- A link to the Case will now appear on the Family Member subform entry.
- This new Case will automatically have all of the other Family Members listed in its Family Details form.
- Fields from the Family Member subform will be copied over to the Case.

Some fields are copied over from the Case to the Family on creation, but are not synced between Family and Case records. This includes:

- Family Details subform / Is this person the caregiver? → Family Members subform / Is this person the caregiver for one of the children in this family?
- Family Details subform / Is this → Family Members subform / What is their role in the family?

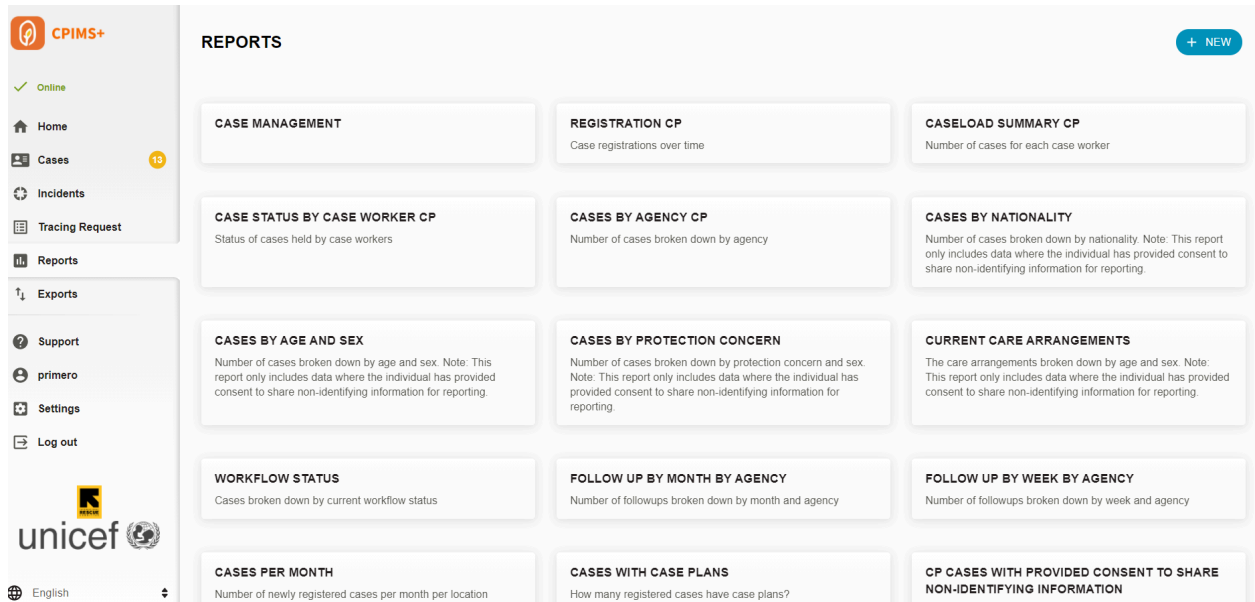
If an update is made on a Family record for the following fields, they will appear in all linked Family records and will be tracked in the change log:

- Family Number
- Size of Family
- Notes on Family

- Name
- List any agency identifiers as a comma separated list
- Other names or spellings known by
- Is this family member alive?
- If dead, please provide details
- Age
- Date of Birth
- Sex
- Is the age estimated?
- National ID
- UNHCR Individual ID
- Other ID
- Language
- Religion
- Ethnicity
- Sub Ethnicity 1
- Sub Ethnicity 2
- Nationality
- Comments
- Occupation
- Current Address (if different from the child)
- Is this a permanent location?
- Current Landmark
- Current Location
- Last Known Address
- Last Known Location
- Telephone / other contact details

Reports

Reports allow users to see a high-level, aggregate view of data, helping them to understand trends and coming challenges in their work. Administrators will be able to navigate to the **Reports** section of the application and view existing reports but not edit them or create new ones, while managers will have the ability to view, create, and edit reports.

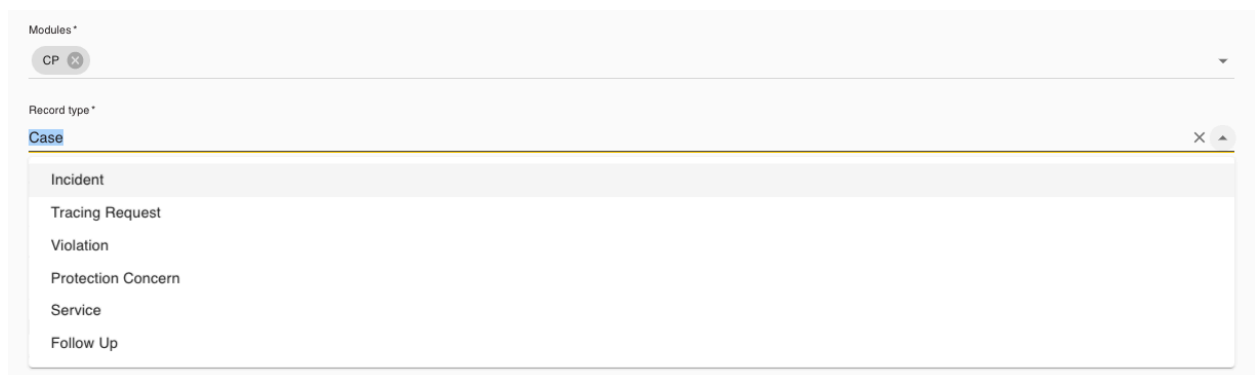


Creating a Report

To create a report, first click on **Reports** in the Navigation Menu. You will see that there are already a number of pre-built reports which you can view at any time. To start your own, click the **NEW** button at the top of the screen. Complete all of the fields as detailed below, and then click **SAVE** to generate and view your report.

Name and Description: Type in a title for the report, so you can find it on the Reports List later.

Module and Record Type: Specify the module and type of records you want to draw the records from for your report. Below, we have chosen the Child Protection module, and the Case record type.



Rows and Columns: Group your data by row and by column by selecting one or multiple fields from a dropdown menu. The options in the menu depend on the type of record and module you selected above. For instance, if you selected Case records, you will only see the fields that would appear on a Case record form, as opposed to an Incident record.

It is possible to select more than one attribute per row or column, for further subdivision of data. Then the first item you choose in each field will be the outer grouping layer, with each successive item acting as a sub-categorization.

Group by row *

Relationship of the Caregiver to the Child

Group by column *

Sex Current Location

Activities

- Start Date of Training
- What other activities is the child involved in?

Assessment

- Assessment requested on
- Date Case Plan Due

Basic Identity

- Case Status

In the example below, the rows are divided by sex and the columns by marital status.

Group by row *

Sex

Group by column *

Current Civil/Marital Status



	Divorced/Separated	Married/Cohabiting	Single	Widowed	Total
Female	1	2	2	0	30
Male	1	1	3	1	27

Age and Date Ranges: Select the tickboxes for age and date ranges to group these large data sets into a smaller, more manageable set of ranges. Note: you must have “Age” selected as a variable in rows or columns to be able to have the data grouped by age ranges.

☐ Use age ranges

0-5, 6-11, 12-17, 18+

Use date ranges

The two images below exemplify the usefulness of this feature. The first image shows part of a sprawling report showing every age. The second shows the same report with age ranges enabled.

AGE AND SEX 2

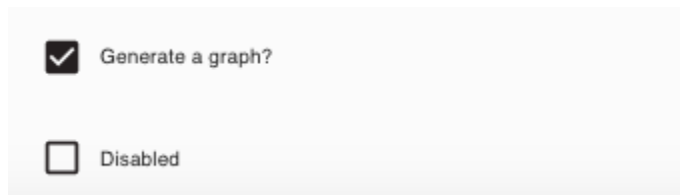
	Female	Male	Total
0	1	0	1
1	1	0	1
2	1	0	1
3	1	2	3
4	1	1	2
5	0	2	2
6	2	0	2
7	3	2	5
8	0	2	2
9	1	1	2
10	1	1	2



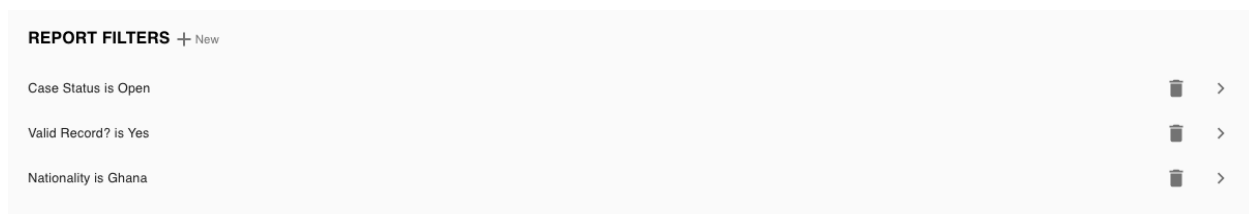
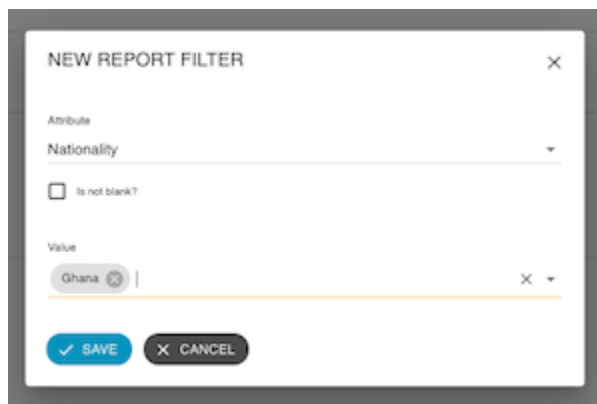
AGE AND SEX 2

	Female	Male	Total
0 - 5	5	5	10
6 - 11	10	7	17
12 - 17	0	0	0
18+	0	0	0

Generate a Graph: Select this tickbox to generate a bar graph of your data in addition to a table report.

A light gray rectangular box containing two checkboxes. The top checkbox is checked and is followed by the text 'Generate a graph?'. The bottom checkbox is unchecked and is followed by the text 'Disabled'.

Filters: Put filters on the records you are using to eliminate irrelevant data. The two default filters are set to ensure that reports include only "Open" and "Valid" records. You can create a filter on any field, as well as specify which values are acceptable for records being included into the report.

A light gray rectangular box titled 'REPORT FILTERS' with a '+ New' link. It contains three filter entries, each with a trash icon and a right arrow icon to its right. The filters are: 'Case Status is Open', 'Valid Record? is Yes', and 'Nationality is Ghana'.A modal dialog box titled 'NEW REPORT FILTER' with a close button (X) in the top right corner. It has two main sections: 'Attribute' and 'Value'. Under 'Attribute', 'Nationality' is selected from a dropdown menu. Below this is an unchecked checkbox labeled 'Is not blank?'. Under 'Value', 'Ghana' is entered in a text field with a clear button (X) to its right. At the bottom are two buttons: a blue 'SAVE' button with a checkmark and a gray 'CANCEL' button with an X.

Reporting Do's and Don'ts:

We have built helpful reporting functionality to be flexible for your programming and to enable administrators and coordinators to be able to see aggregate, anonymized data in a safe manner rather than exporting the data from the case lists themselves. Below is guidance to consider when you are making reports.

- Before creating a report, **review your reporting needs** by understanding the type of reports that are needed on a regular basis
- Before creating a report, **understand what you need for a report and make a list** of the variables that you need in your reports and draft how these reports could look in Primero. For example, "Protection Concerns", "Number of completed services" by "Agency"

- **Do** play with the reports and reverse the variables you select by “row” and “column” to see how the table data can be more appropriate for your needs

Group by row *

Case Manager's Location ×

Group by column *

Protection Concerns ×

- **Do use the filters to apply “dates”** to your reports. For example, if you would like to see the number of registered cases in January, select “Date of Registration” and select the constraint “After” and the value “January 1, 2022” as shown below. Click “Save”. Add another filter for “Date of Registration”, select the constraint “Before” and the value “February 1, 2022”. This will show you all registered cases in the month of January.

NEW REPORT FILTER ×

Attribute

Date of Registration × ▼

Constraint

After ▼

Value

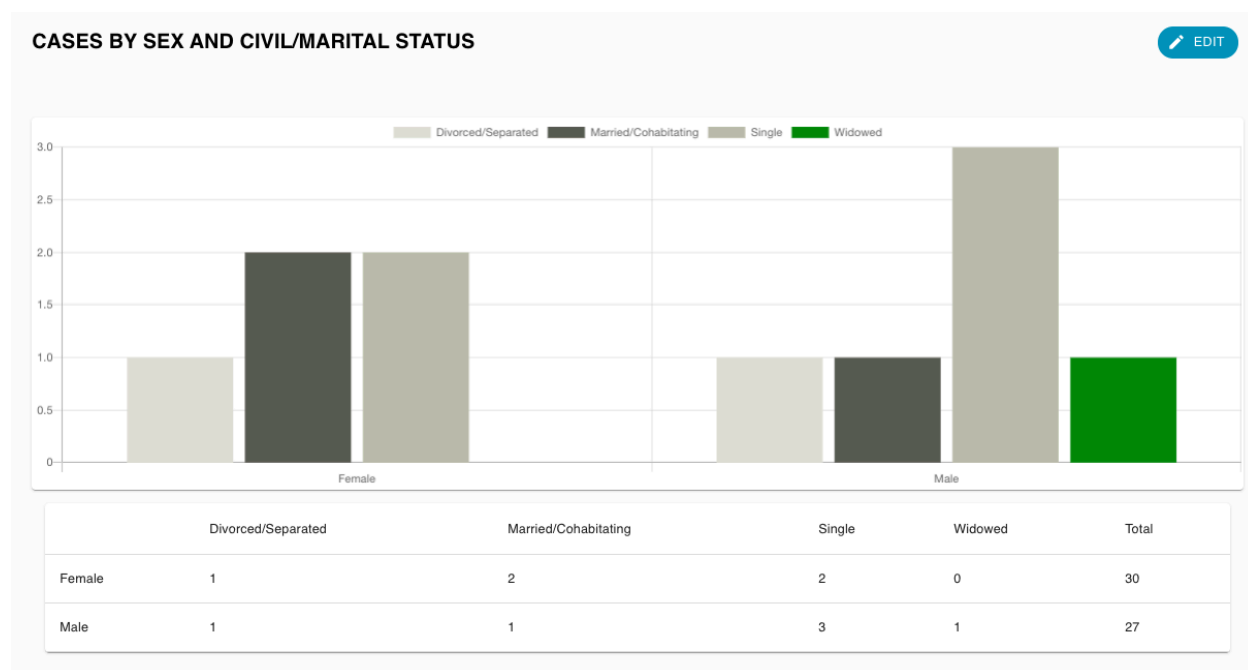
01-Jan-2022

✓ Save × Cancel

- **Do apply the appropriate filters** to ensure data is displayed based on the child’s consent, if the cases should be “open” or “valid” (valid will not include disabled cases)
- **Do delete reports you do not use**
- **Do not export large amounts of child records data from your cases and save them to your computer without trying to create the report first in Primero**
- **Do not generate a report or export large reports during peak hours of usage** to ensure it does not slow down the system for case workers and managers

Viewing a Report

If you click SAVE on your report, and it saves successfully, you will arrive at the view page for your report. If you did not select the "Generate a graph" tickbox, you will see a data table representing your report. If you specified that your report should generate a graph, you will see the graph followed by the table report.



Note that the columns of your report contain a "Total" column, which shows the aggregate for each row. The numbers in each of your columns may not add up to the number in your total column, since many fields will go undefined by the workers doing registration. For instance, in the example above, there were a total of 30 female cases, but only 5 in which the marital status field was filled out.

If you wish to view only the cases that contain relevant data, you can select EDIT to go back into the case. Then, create a new report filter and select the "Is not blank?" tick box. Once saved again, the report generated with this criteria has a Total column that only calculates based on the completed fields.

NEW REPORT FILTER
×

Attribute
Current Civil/Marital Status

☒ Is not blank?

✓ SAVE
✕ CANCEL

	Divorced/Separated	Married/Cohabiting	Single	Widowed	Total
Female	1	2	2	0	5
Male	1	1	3	1	6

Note: “Incomplete Data” field values show the number of cases where the field is not filled out on the case.

Note: multi-select dropdown fields should be exported into excel for analysis instead of within the reports.

Insights

Insights allow users to see a high-level, aggregate view of data, helping them to understand trends and coming challenges in their work. All users will be able to navigate to the **Insights** section of the application and view existing insights but not edit them or create new ones as the insights are based on pre-defined variables. Users will be able to filter by date, status, and other reportable fields.

The following Insights are available in CPIMS+ by age and sex which can be filtered by date (week, month, quarter, year) by case status (open, closed) by user group or agency of record owner:

- Workflow: view all cases and incidents and filter using date, case status, user group or agency and workflow status (assessment, case plan, etc.)
- Referrals and transfers: view all cases which have been referred or transferred and filter using date, case status, user group or agency and transfer/referral status

- Protection concerns: view all cases and filter using date, case status, user group or agency and protection concerns
- Follow Ups: view all cases and filter using date, case status, user group or agency and type of follow up (note: date of follow up must be entered on the follow up form)
- Services: view all cases and filter using date, case status, user group or agency and type of follow up (note: service completed date must be entered on the services form)
- Reporting location: view all cases and filter using date, case status, user group or agency and reporting location (defaulted to the record owner location in their user profile at admin 2)
- Type of Violence: view all incidents by the "Type of Violence" (under the CP Incident form) and filter using date, case status, user group or agency

For a detailed breakdown of how the Insights are calculated please click here: <https://docs.google.com/spreadsheets/d/146z4vJel3GDxgUEF6zaAardTgT6WSVyWAqBC7xhghBI/edit?usp=sharing>

For the Jordan TSFV implementation of Primero, there are specific Insights that have been developed which include "Workflow Insight: Cases and Incidents with selected Workflow Status, broken down by age and sex". Please note that this will not work for any implementations other than TSFV.

Audit Logs

Some administrative users and team managers may have access to the *Audit Logs*. To access this feature, click the Settings link in the Navigation Menu. Once you are in Settings, click "Audit Logs" in the Settings Navigation Menu.

The screenshot shows the Primero application interface. On the left is a navigation menu with options like Home, Cases, Incidents, Tracing Request, Insights, Reports, Exports, Support, Field Mode, and Settings. The 'Settings' option is selected, leading to the 'Audit Logs' page. The main area displays a table of audit logs with the following data:

Time	Performed By	Action	DESCRIPTION	Record Owner
10-May-2026 17:15	primero	Update	Update Case 724aaa1	primero
10-May-2026 17:15	primero	Show alerts	Show alerts Case 724aaa1	primero
10-May-2026 17:15	primero	Show	Show Case 724aaa1	primero
10-May-2026 17:14	primero	Listing Records	Listing Records Case	primero
10-May-2026 17:12	primero	List users for record assignment	List users for record assignment User	primero
10-May-2026 17:07	primero	Listing Records	Listing Records Incident	primero
10-May-2026 17:07	primero	List users for record assignment	List users for record assignment User	primero
10-May-2026 17:07	primero	Listing Records	Listing Records Case	primero
10-May-2026 17:07	primero	List	List Form	primero
10-May-2026 17:07	primero	Listing Records	Listing Records Lookup	primero
10-May-2026 17:07	primero	Listing Records	Listing Records System settings	primero
10-May-2026 17:07	primero	List	List Permission	primero
10-May-2026 17:07	primero	Listing Records	Listing Records Dashboard	primero
10-May-2026 17:07	primero	Bulk Index	Bulk Index Alert	primero

On the right side of the table, there are filter controls for 'Time', 'Performed By', 'Action', and 'Record Type', each with a dropdown arrow. Above these filters are 'Apply' and 'Clear' buttons.

The Audit Logs page shows you a list of all actions which users have committed in the system. Each row represents a different action, including the username of the user, the type of action, a description of what was performed, the record owner of the case/incident, and the date and time of the action. Using the filters menu to the right of the list, you can limit which audit log entries are displayed. You can filter by date and time or username. To apply a set of filters, click "Apply," and to clear out all filters, click "Clear."

NOTE: The Audit Logs do not contain identifiable information from records. For instance, an audit log entry might tell you that the user "john-case-worker" edited a case with the ID "abcd123" at 10:15 on October 1, 2025. However, it will not tell you what specific information was added to the case.

Below is an explanation of the various audit log messages you may see in Primero.

Message	What does it mean?
Login User	User has logged in You will also see "Viewing User", "List Form", "List Permission", "List all Alert", "Listing Records Lookup", "Listing Records settings" and these are automatic
List: Dashboard	User has viewed the dashboard
List: Form	User has logged in or refreshed the screen and is able to see forms within the system
List: Permission	User has logged in or refreshed the screen and is able to see their own permissions within the system
List: Report	User has viewed the list of reports
List: Role	User has viewed the list of roles
List: User group	User has viewed the list of user groups
Show: Viewing Child	User has viewed an individual child record
Show: Viewing Report	User has viewed a report
Show: Viewing User	User has viewed a user profile

Show alerts: View alerts for Child	This is automatic when a user views a case and system displays yellow alerts on the case
Refer to: search for referral recipient User	User is making a referral to another user who can receive referrals for a specific service or agency
Index: Listing Records [missing "en.logger.resources.flag" translation]	User is viewing the flagged cases dashboard
Index: Listing Records Agency	User has viewed the agency list
Index: Listing Records Audit log	User has viewed the audit log
Index: Listing Records Bulk export	User has viewed the exports list
Index: Listing Records Child	User has viewed the case list
Index: Listing Records Lookup	User has logged in or refreshed the screen and is able to see lookups within the forms within the system
Index: Listing Records Primero configuration	User has viewed the configurations in the settings
Index: Listing Records System settings	This is automatic when a user logs in
Index: Listing Records User	User has viewed the "users" under the settings
Bulk index: List all Alert	This is automatic when system displays yellow alerts on all records that the user has access to
Create: Create child	User has created a new record

Update: Updating child	User has edited a case record
Enable disable record: Enable / disable Child	User has disabled a case
primero_configuration	User has promoted the configuration
code_of_conduct	User has updated the code of conduct
task	User has created a task

If “Performed by” and “Record Owner” appear blank, with Login User as one of the messages (as shown in the image below), this is a failed login where a user attempted to log in but was not able to successfully log into the system.

Audit Logs

Time	Performed By	Action	DESCRIPTION	Record Owner
11-Mar-2024 11:42		Login	Login User	
11-Mar-2024 11:41		Login	Login User	

Speech to Text

How you do speech to text matters. You must discuss with your data protection focal points within your organizations before using speech to text due to the nature of the data being collected in Primero. Your data protection focal points will be able to advise

on a recommended service (if any) to ensure data is not saved elsewhere and adheres to your data privacy and protection protocols.

On your mobile device, you can install applications that allow you to talk into your device, and it converts the talking to text. This functionality is not developed by the Primero team, but will work within Primero.

Gboard - Speech to Text offered by Google

For Android devices above Android version 7 and iPhones and iPads with iOS 9 or higher, you can install [Gboard](#). Once logged into Primero, you can tap into a field you

want to fill out and at the top of the keyboard you can tap Microphone . When you see "Speak now," say what you want written. You can find out more on how to add punctuation, replace words and switch languages through the Gboard support page: <https://support.google.com/gboard/answer/2781851?hl=en&co=GENIE.Platform%3DAndroid&oco=0>.

The data with Gboard is not saved to a cloud, or another provider. It is saved to your device and you can delete words following this instruction:

<https://support.google.com/gboard/answer/9058584?hl=en&co=GENIE.Platform#zippy=%2Cdelete-saved-words>