

PCMIMS+ User Guide

April 2025

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Introduction

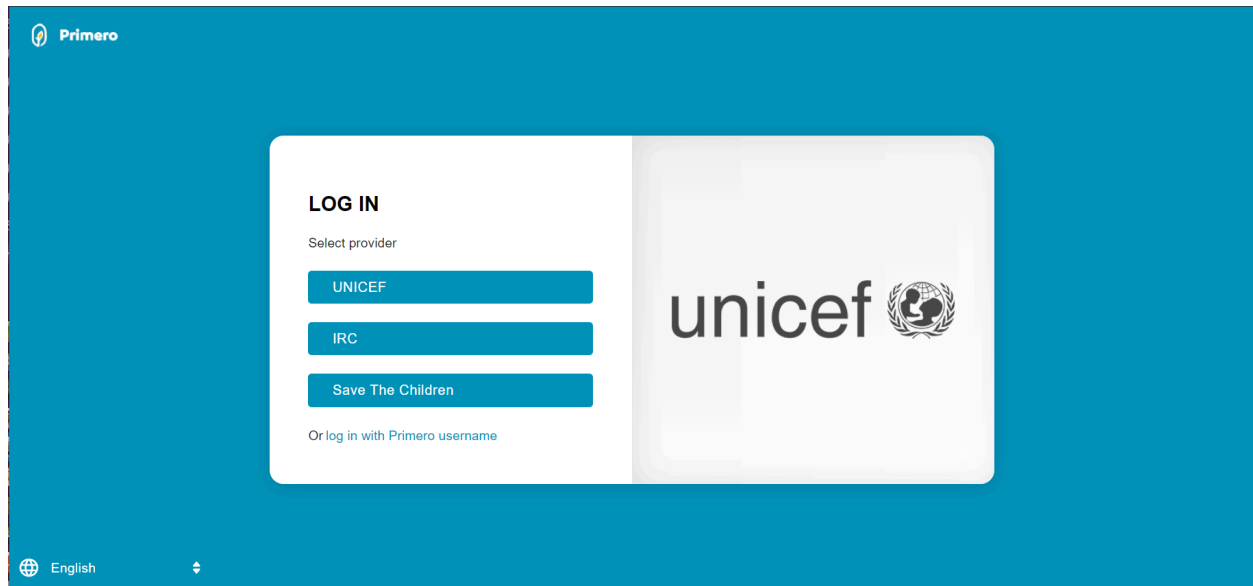
The purpose of this user guide is to outline all features and functionality available in Primero for PCMIMS+. The forms built into Primero are configured to the in-country

forms currently being used and aligned to standard operating procedures currently in practice.

Logging In

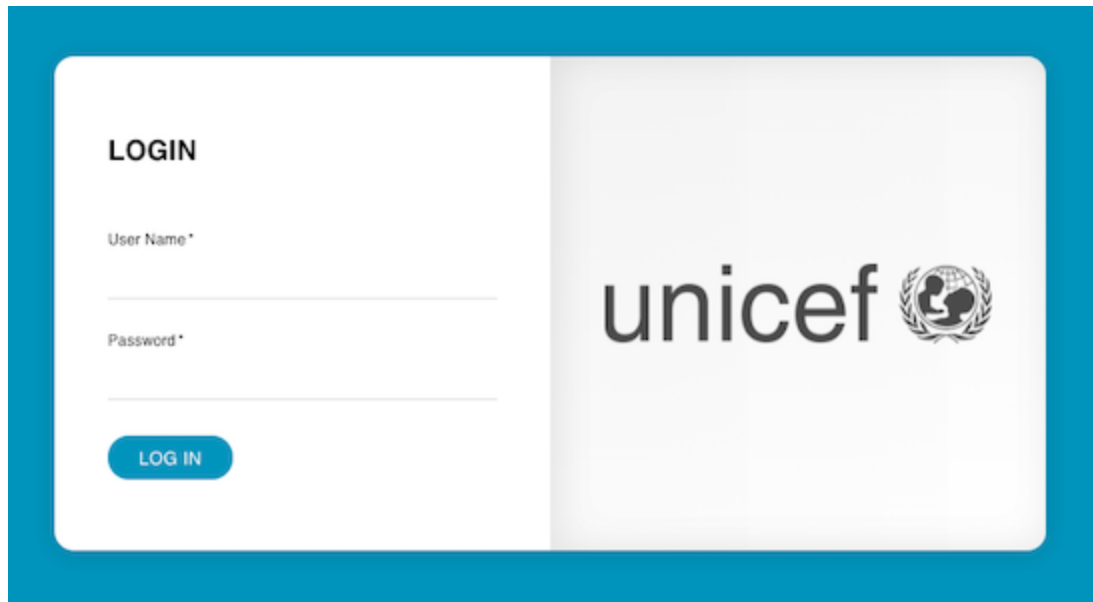
When logging into Primero, you'll see either:

1. **Participating Single-Sign On (SSO) Organizations***: If you see your organization listed, click on your organization to sign in through single-sign on as seen below:



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. **Username and Password*** (not active when SSO is enabled): Click in the Username field and type in the unique username 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: An instance can utilize either SSO or Username and Password for logging into the system. You cannot utilize both on the same instance.*



Note that access to features and functionality varies depending on the user you are: Case Worker, Case Management Supervisor, Program Coordinator, Focal Point, M&E, or System Admin.

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

- **PCM Case Worker:** create and edit only my own cases only
- **PCM Case Management Supervisor:** view only the cases which are managed by case workers under their supervision
- **PCM Program Coordinator:** view only cases which are managed by case workers within their agency/organization
- **PCM Service Provider:** role used to receive PCM internal (Primero) referrals; only sees designated forms and data per role's referral configuration
- **PCM M&E:** view only relevant case data for reporting and analysis which are managed by case workers in their designated user group(s)
- **PCM Organization Focal Point:** limited to administrative access for user management in their agency only – no visibility into case files
- **PCM In-Country System Admin:** limited administrative access to demo and production systems for user management functions across all agencies using PCMIMS+

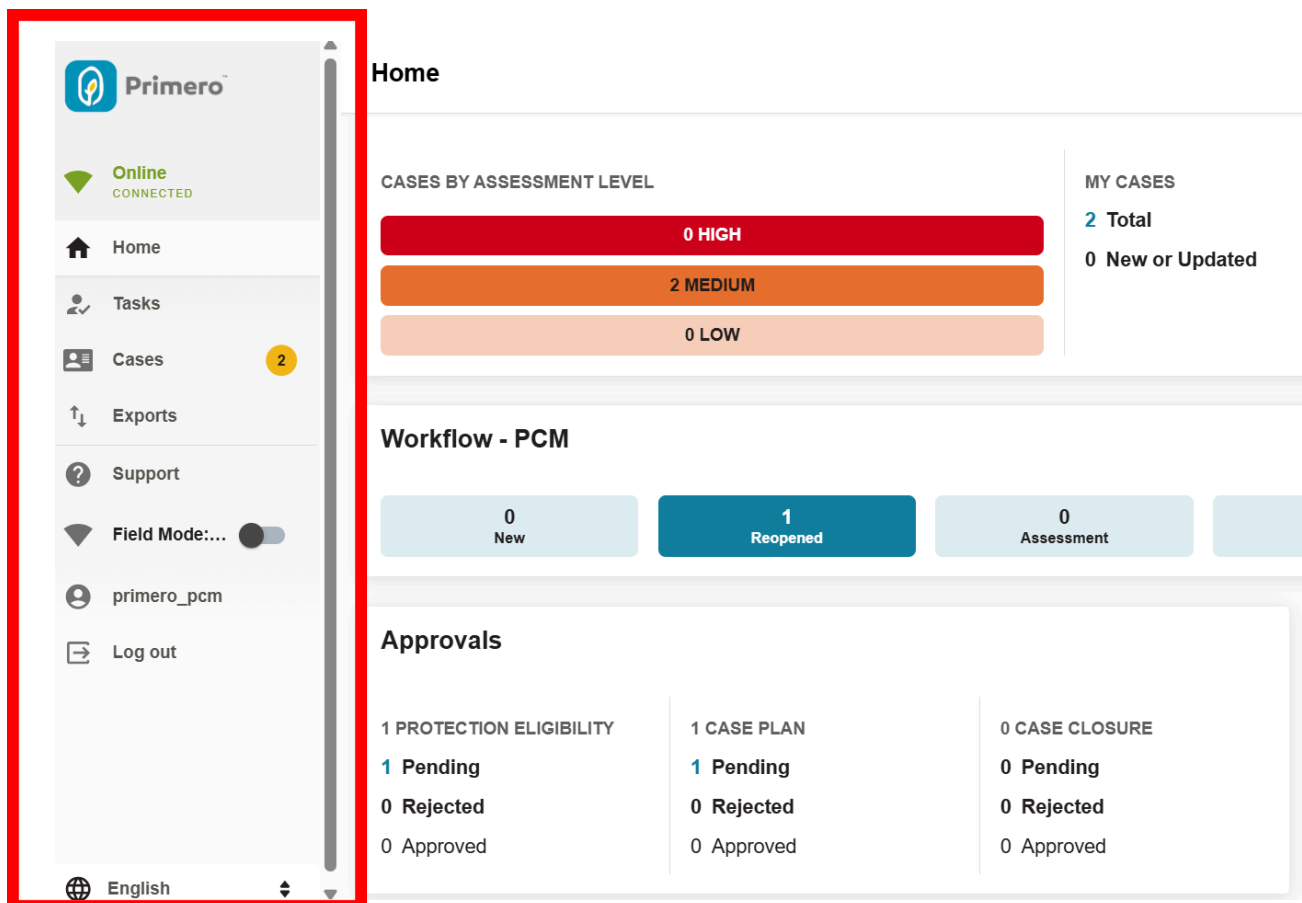
- **PCM HQ System Admin:** configures instance; all-encompassing administrative access/manager permission to demo and production systems for user and system management across all agencies using PCMIMS+
- **Superuser:** all-encompassing “manage” permissions; only enabled for emergency maintenance and support

Navigating Primero

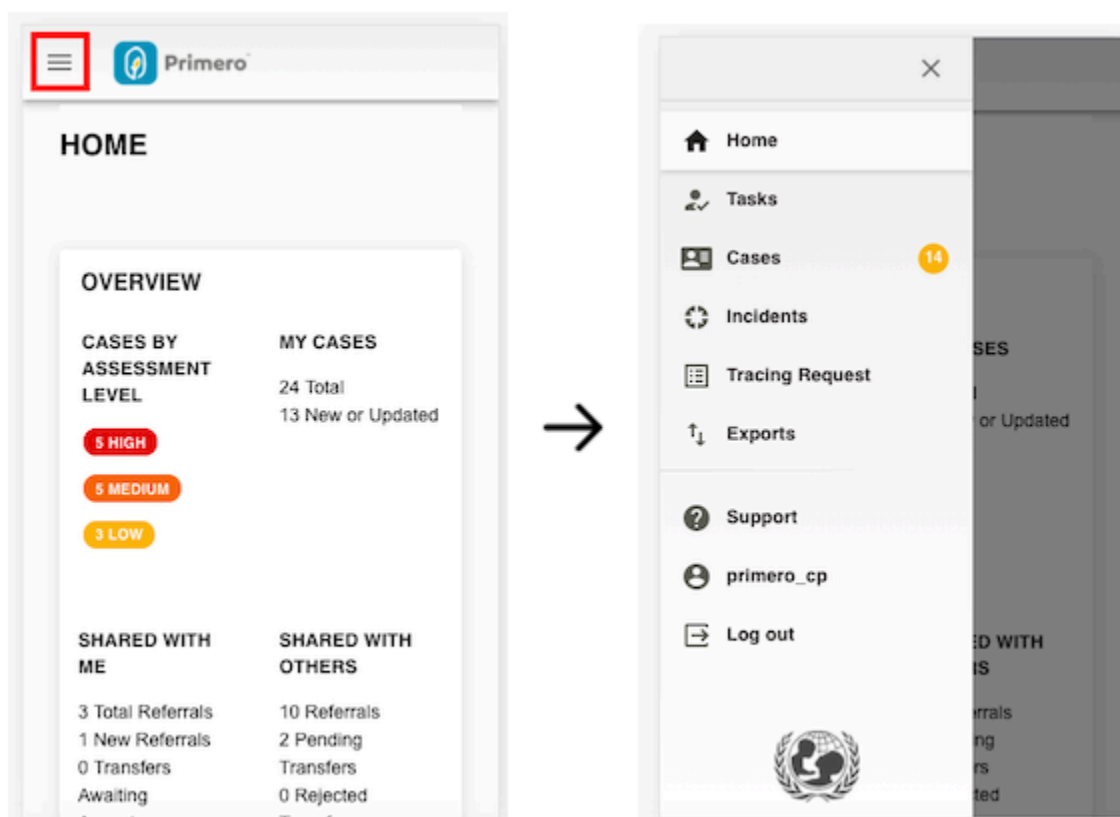
Navigation Menu

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, case 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 Primo. The type of information that appears here will depend on the type of work you do for your organization. For instance, case workers, managers, and agency administrators will each see dashboards which are tailored to the needs of their day-to-day work.

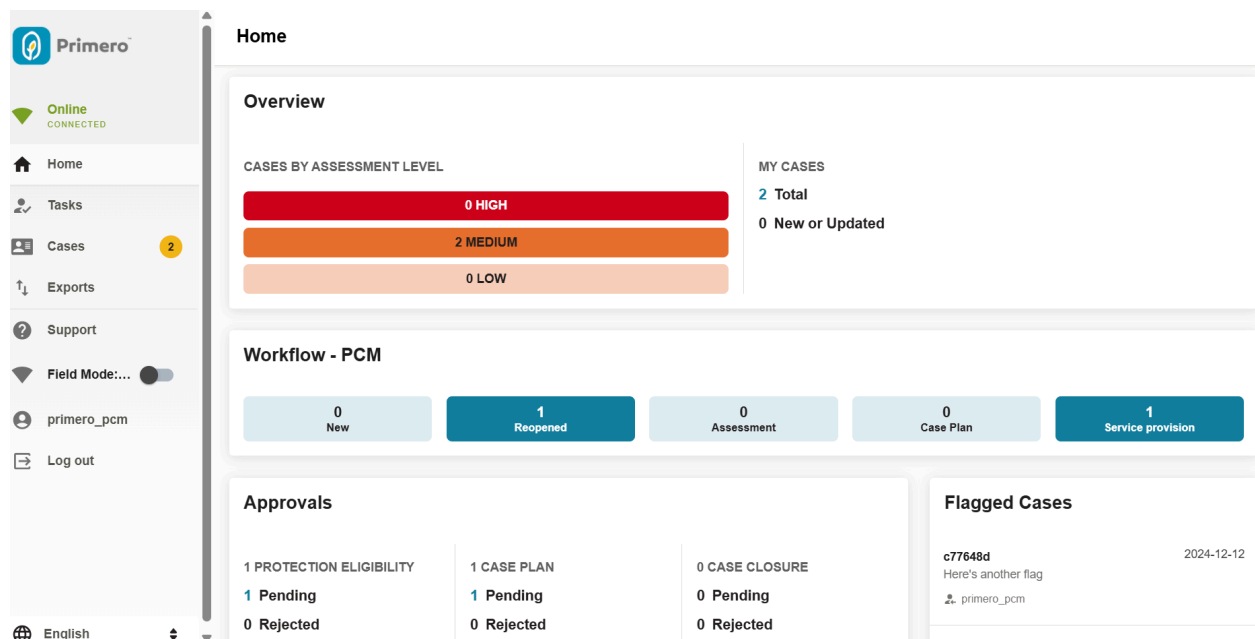
A few notes about dashboards:

- 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.
 - If you are a Case Management Supervisor and have access to all the cases managed by users in your team (user groups), the numbers in your dashboard will reflect these cases.
 - 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 disabled [UI](#) records.

Case Worker Dashboards

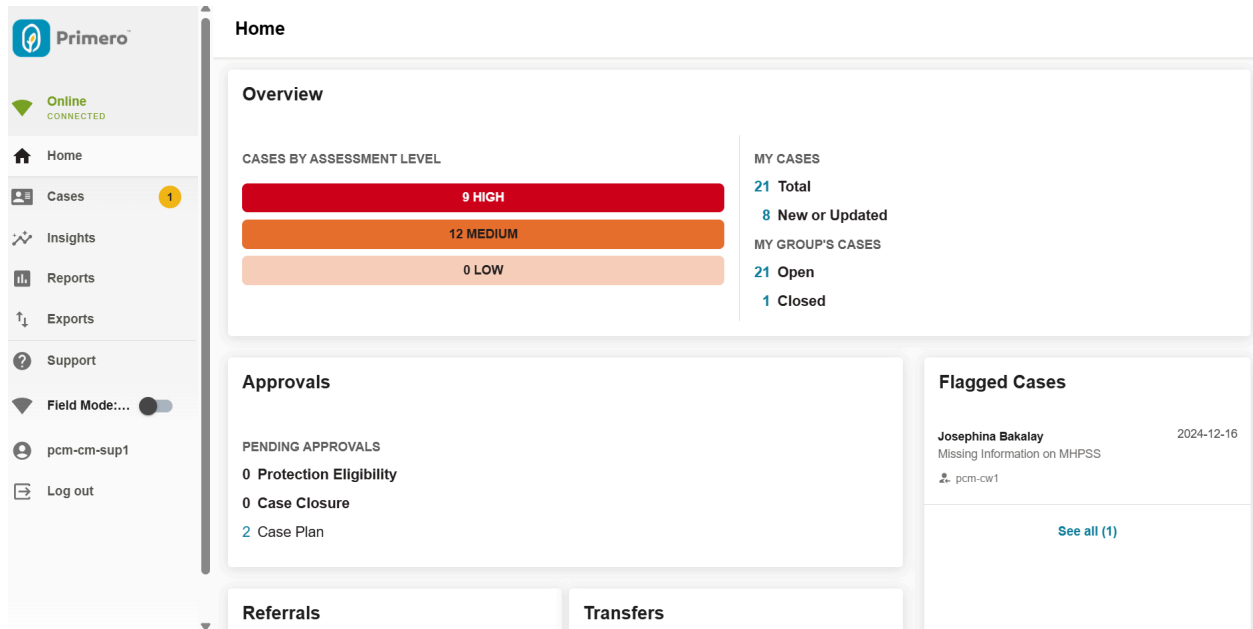
The image below shows an example of the dashboard you might see as a case worker when you first login to Primero.



- *Cases by Assessment Level* - This section tells you how many of your cases are at each "Risk Level"
- *My Cases* - This includes two indicators:
 - "Total" - The total number of cases you manage
 - "New and 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.
- *Approvals* - This tells you how many of your approval requests are pending, approved, or rejected by a case management supervisor. 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, Reopened, Assessment, Case Plan, and Service Provision. 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 management supervisor)
- *Shared with Me* - This shows you the number of cases which have been referred or transferred to you. We will review referrals and transfers in a later section.
- *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.

Case Management Supervisor Dashboards

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



- *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.

Home

Referrals

SHARED WITH ME
0 Total
0 New

Transfers

SHARED WITH ME
0 Awaiting Acceptance
SHARED WITH MY TEAM
0 Awaiting Acceptance

Shared From My Team

CASE WORKER	REFERRALS	PENDING TRANSFERS	REJECTED TRANSFERS
Sorry, no matching records found			

Shared With My Team

CASE WORKER	REFERRALS	PENDING TRANSFERS
Sorry, no matching records found		

Overdue Tasks

- *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.

Home

Shared With My Team

CASE WORKER	REFERRALS	PENDING TRANSFERS
Sorry, no matching records found		

Overdue Tasks

CASE WORKER	ASSESSMENT	CASE PLAN	SERVICES	FOLLOW UP
pcm-cw1	4	0	3	3

Cases by social worker

CASE WORKER	TOTAL	NEW & UPDATED
pcm-cw1	21	8

Workflow - Teams cases

	NEW	ASSESSMENT	CASE PLAN	SERVICE PROVISION	CLOSED
pcm-cw1	6	8	4	3	1

- *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.

- *Cases by Social Worker* - This section shows the number of open cases assigned to each caseworker in your team/user group.
- *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.

The screenshot shows the Primero CP Administrator Dashboard. On the left is a sidebar with navigation links: Home, Cases (with a yellow badge showing '6'), Incidents, Tracing Request, Families, Reports, Exports, Support, Field Mode (with a toggle switch), primo, Settings, and Log out. The main content area is titled 'Home' and contains two sections. The first section is 'Cases', which displays a table with the following data:

DISTRICT	OPEN CASES	NEW (LAST WEEK)	NEW (THIS WEEK)	CLOSED (LAST WEEK)	CLOSED (THIS WEEK)
Bakhchysaraiskiy	16	0	0	0	0
Bilohirskiy	2	0	0	0	0
Synelnkyivskiy	1	0	0	0	0
Bilotserkivskiy	1	0	0	0	0
Mykolaivskiy	1	0	0	0	0
BohoduKhivskiy	1	0	0	0	0
Kyiv	1	0	0	0	0

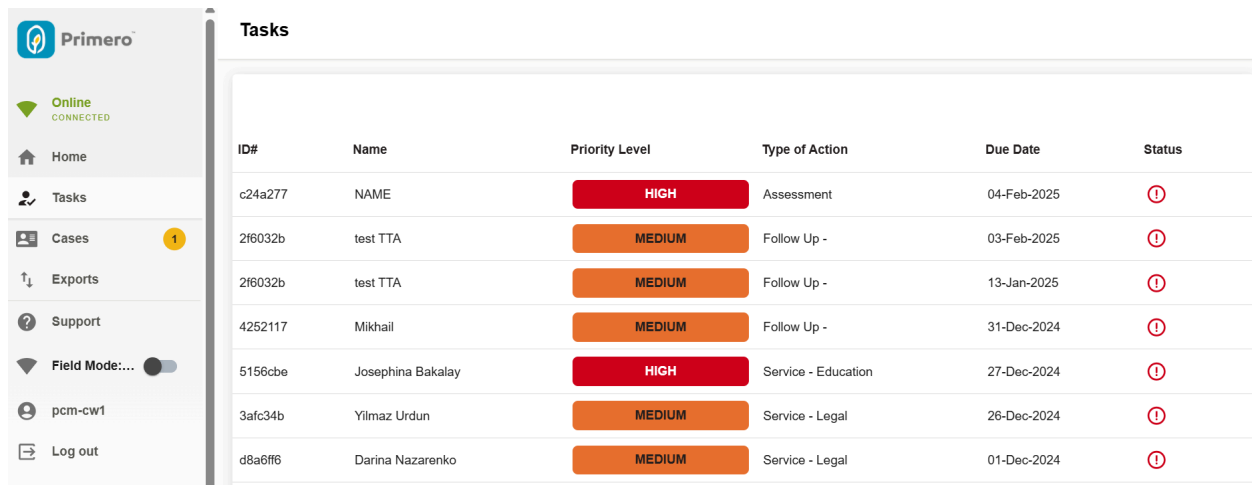
The second section is 'Protection Concerns', which displays a table with the following headers: PROTECTION CONCERN, ALL CASES, OPEN CASES, NEW (THIS WEEK), and CLOSED (THIS WEEK). Below the headers, it says 'Sorry, no matching records found'.

- *Cases by Location* - This table shows the number of cases registered in each location. For each location, the table also shows:
 - "Open Cases" - Total number of open cases registered in this location.
 - "New (Last Week)" - Cases registered in this location 7-14 days ago.
 - "New (This Week)" - Cases registered in this location 0-7 days ago.
 - "Closed (Last Week)" - Cases registered in this location which were closed 7-14 days ago.

- "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:
 - "All Cases" - This includes both open and closed cases.
 - "Open Cases" - This includes only cases which are still open.
 - "New (This Week)" - Open cases registered 0-7 days ago.
 - "Closed (This Week)" - Cases which were closed 0-7 days ago.

Tasks List

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



ID#	Name	Priority Level	Type of Action	Due Date	Status
c24a277	NAME	HIGH	Assessment	04-Feb-2025	ⓘ
2f6032b	test TTA	MEDIUM	Follow Up -	03-Feb-2025	ⓘ
2f6032b	test TTA	MEDIUM	Follow Up -	13-Jan-2025	ⓘ
4252117	Mikhail	MEDIUM	Follow Up -	31-Dec-2024	ⓘ
5156cbe	Josephina Bakalay	HIGH	Service - Education	27-Dec-2024	ⓘ
3afc34b	Yilmaz Urdun	MEDIUM	Service - Legal	26-Dec-2024	ⓘ
d8a6ff6	Darina Nazarenko	MEDIUM	Service - Legal	01-Dec-2024	ⓘ

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.

Tasks

ID#	Name	Priority Level	Type of Action	Due Date	Status
c24a277	NAME	HIGH	Assessment	04-Feb-2025	
2f6032b	test TTA	MEDIUM	Follow Up -	05-Feb-2025	
2f6032b	test TTA	MEDIUM	Follow Up -	13-Jan-2025	
4252117	Mikhail	MEDIUM	Follow Up -	31-Dec-2024	
5156cbe	Josephina Bakalay	HIGH	Service - Education	27-Dec-2024	

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 an Assessment Task, I will arrive at the Risk Assessment form for that Case. This form contains the field "Date of Assessment". If I fill out this field, the Task will be completed and will disappear from the Tasks list.

Case ID: c24a277CancelSave

1 New

2 Assessment

3 Case Plan

4 Service provision

5 Closed

Record Information

Interpreter Agreement

Intake Assessment

Risk Assessment

MHPSS

Case Plan

Risk Assessment

Begin Assessment?
☒ Yes

Date of Assessment *

This field is used for the Workflow status.

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).

- Risk Assessment:
 - Due Date: "Date Risk Assessment Due" on the "Intake" form

Intake Assessment ▾

Intake

Protection Eligibility

Consent & Registration

Risk Assessment

MHPSS ^

Case Plan ^

Safety Plan

Case Closure

Case Notes

Other Documents

Gender

Woman

Age*

40

Date of Birth

01-Jan-1984

dd-mmm-yyyy

Is the client already receiving case management from another organisation or actor, or have they in the past?

☐ Yes ☒ No

Date Risk Assessment Due

02-Dec-2024

dd-mmm-yyyy

- Complete: "Date of Assessment" on the "Risk Assessment" form.
- Service:
 - Due Date: "By When" on the "Services" subform.
 - NOTE: Each Service subform entry will generate its own Task.
 - Complete: "Service Implemented On"

SERVICES

×

Type of Response

Service provision

Type of Service

Health

Service Referral Risk Level

(Select...)

Goal(s) from Case Plan Actions

Created on

11-Apr-2025 11:56

dd-mmm-yyyy hh:mm

By When?

12-Apr-2025

This field will create a reminder in the Tasks List.

- 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



Follow Up Planning

Follow up needed by

19-Apr-2025



This field will create a reminder in the Tasks List.

Location

Time

Adjustments for full participation needed

Check whether you need to make any adjustments to ensure the clients full participation in the next meeting.(i.e. organizing for interpretation, meeting in a more accessible place)

Implement Follow Up now?

☐ Yes

✓ Add

✕ Cancel

Follow Up Implementation

Record these details on the day of your Follow Up meeting

Follow up date *



dd-mmm-yyyy

Record Lists

There is one main types of record 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 Protection Case Management 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 a page with contact information for your system administrator, as well as links to support forums and documentation.

**Primer**

✓ Online

 Home

 Tasks

 Cases 3

 Exports

 Support

 **primero_cp**

 Log out

Contact Information

Name
Kingsley Osei Owusu

Organization
Ministry of Gender Children and Social Protection

Phone
+233 246076183

Other information
--

Support Forum
<https://community.primer.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.

**Primero™**

**Online**
CONNECTED

Home

Tasks

Cases1

Exports

Support

Field Mode:...☐

pcm-cw1

Log out

PCM Caseworker 1

Full Name*
PCM Caseworker 1

Username*
pcm-cw1

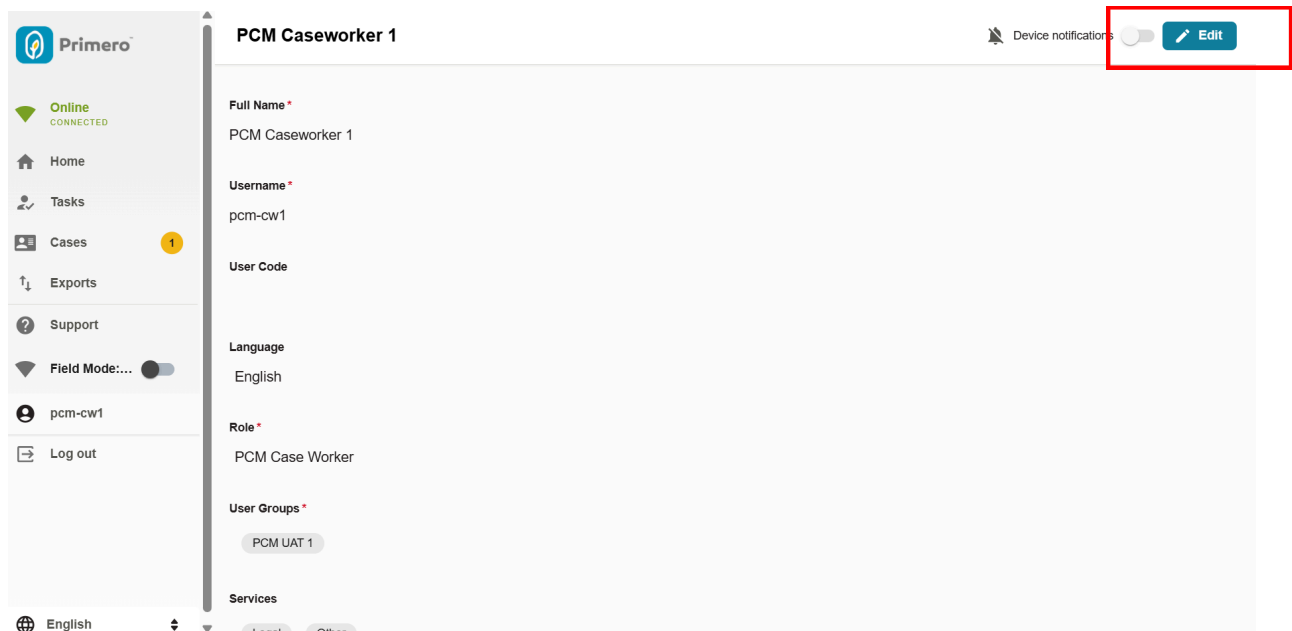
User Code

Language
English

Role*
PCM Case Worker

User Groups*
PCM UAT 1

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.



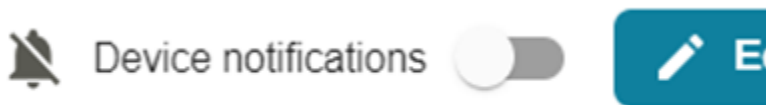
Here, you will be able to update the following:

- **Full Name:** The name managers and administrators will see when looking at your account.
- **Username:** The name you use to log into the system
- **User Code:** User codes are used in the system-generated PCMIMS+ ID and will only appear if your PCMIMS+ has been customized to show your user code on records that you create
- **Password¹:** 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.

¹ Only relevant when not utilizing SSO

- **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: 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).



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.

PCM Caseworker 1

✕ Cancel

✓ Save

Full Name *

PCM Caseworker 1

Username *

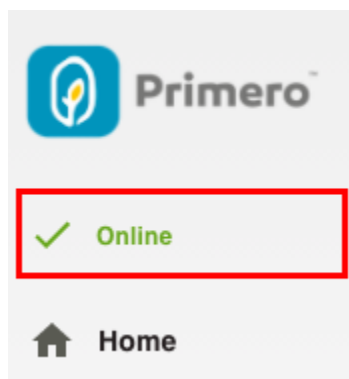
pcm-cw1

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

Offline Mode

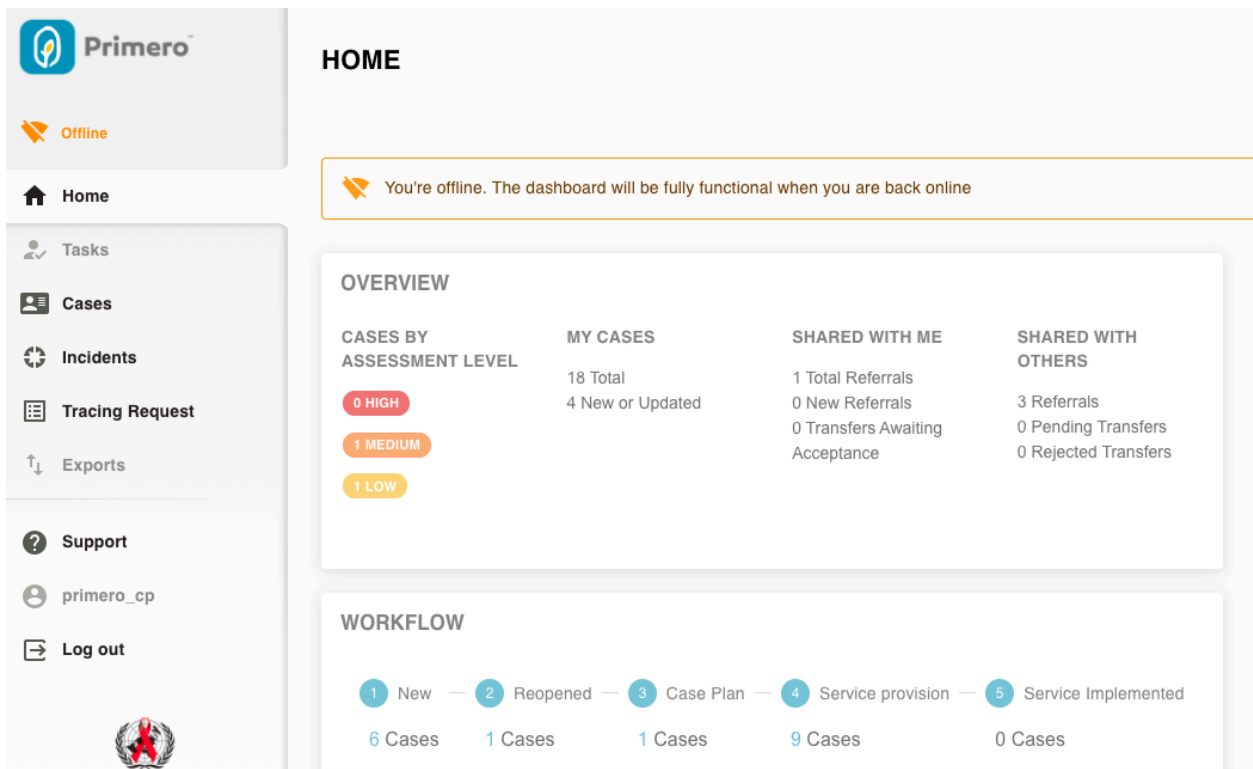
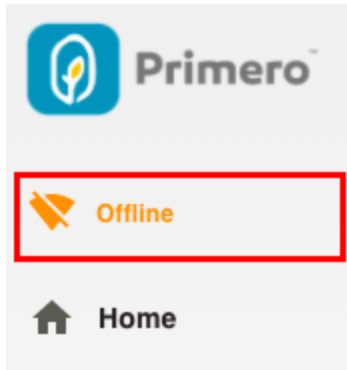
Online Mode:

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	cpcasetransfer 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	

Search Filters Apply Age Range

- 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:

Primero

Offline Home Tasks Cases Incidents Tracing Request Exports Support primero_cp Log out

CASES + NEW

0 case(s) selected Rows per page: 20 0-0 of 0

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	

FILTERS APPLY SAVE CLEAR

Age Range Sex Case Plan Risk Level No Activity Status

Status ☒ Open ☐ Closed

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*.

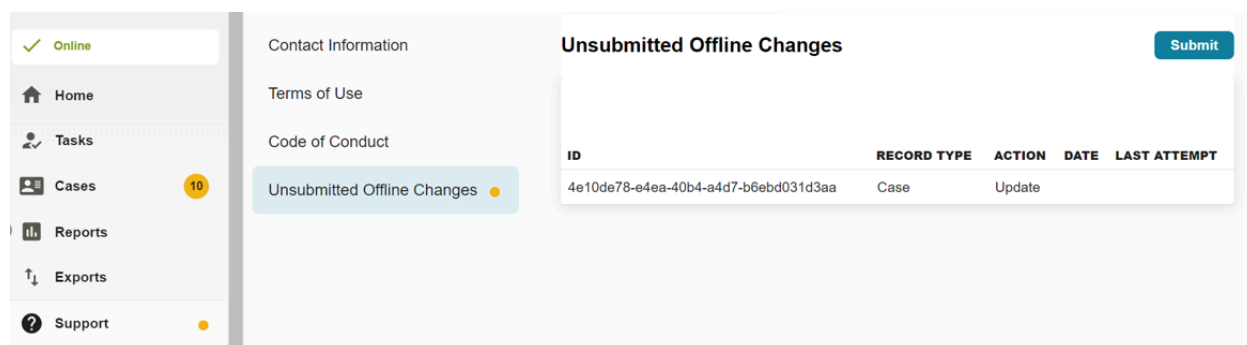
- Only certain actions will be available in Offline Mode (such as requesting approvals or deleting uploads). Note that these actions will only get submitted to the system once you are back online.
- Some pages, such as Tasks and Exports, are unavailable in Offline Mode.
- While offline, the case list 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:



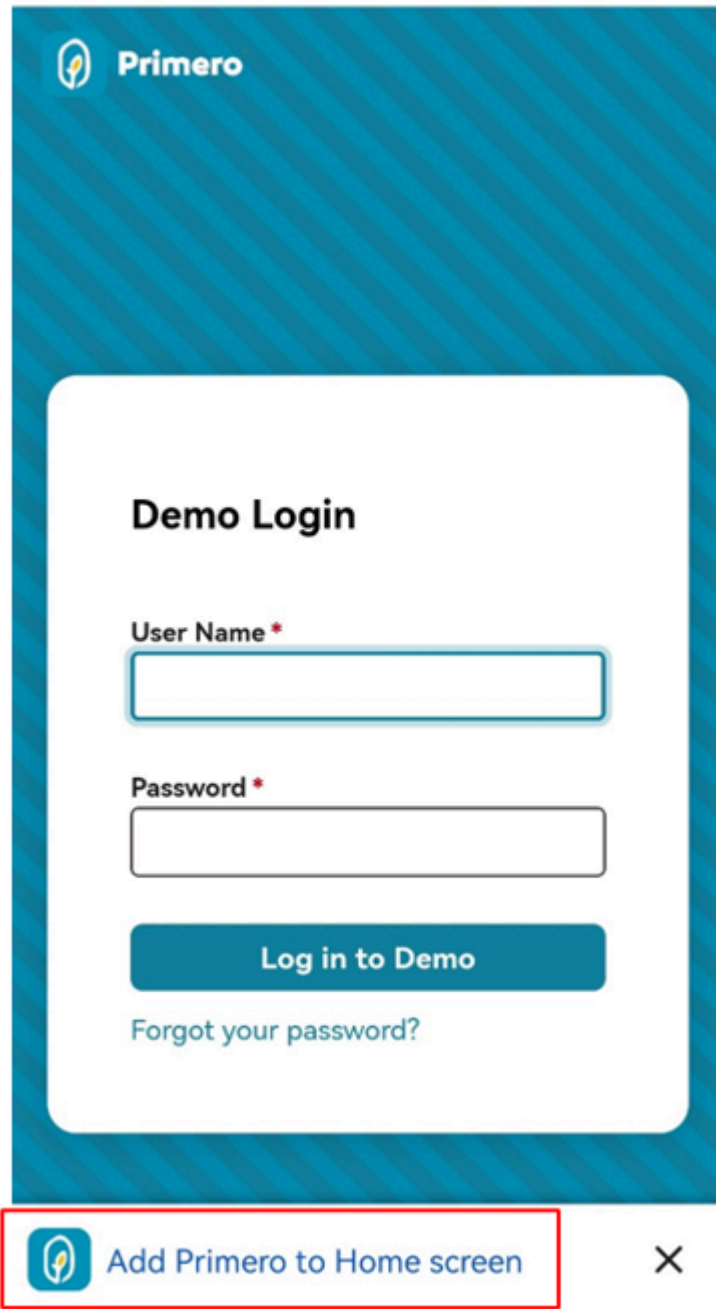
When users are offline, and if they go online and any cases fail to sync in the backend of the system, users can try to re-submit any of the unsynced records here by clicking "Submit". When the user clicks on submit, Primero attempts to submit the changes again. This is useful for those users who have 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.primerio.org
3. You will see ‘ **Add Primero to Home Screen**’ at the bottom. Select it.



The image shows a mobile screen with a blue background featuring diagonal lines. At the top left is the Primero logo, which consists of a yellow lightning bolt inside a blue circle, followed by the word "Primero" in white. In the center is a white rounded rectangle containing the text "Demo Login". Below this are two input fields: "User Name *" and "Password *", each with a red asterisk. Below the password field is a blue button with the text "Log in to Demo". Below the button is a link that says "Forgot your password?". At the bottom of the screen, there is a red rectangular box highlighting a button that says "Add Primero to Home screen" next to the Primero logo. To the right of this button is a black "X" icon.

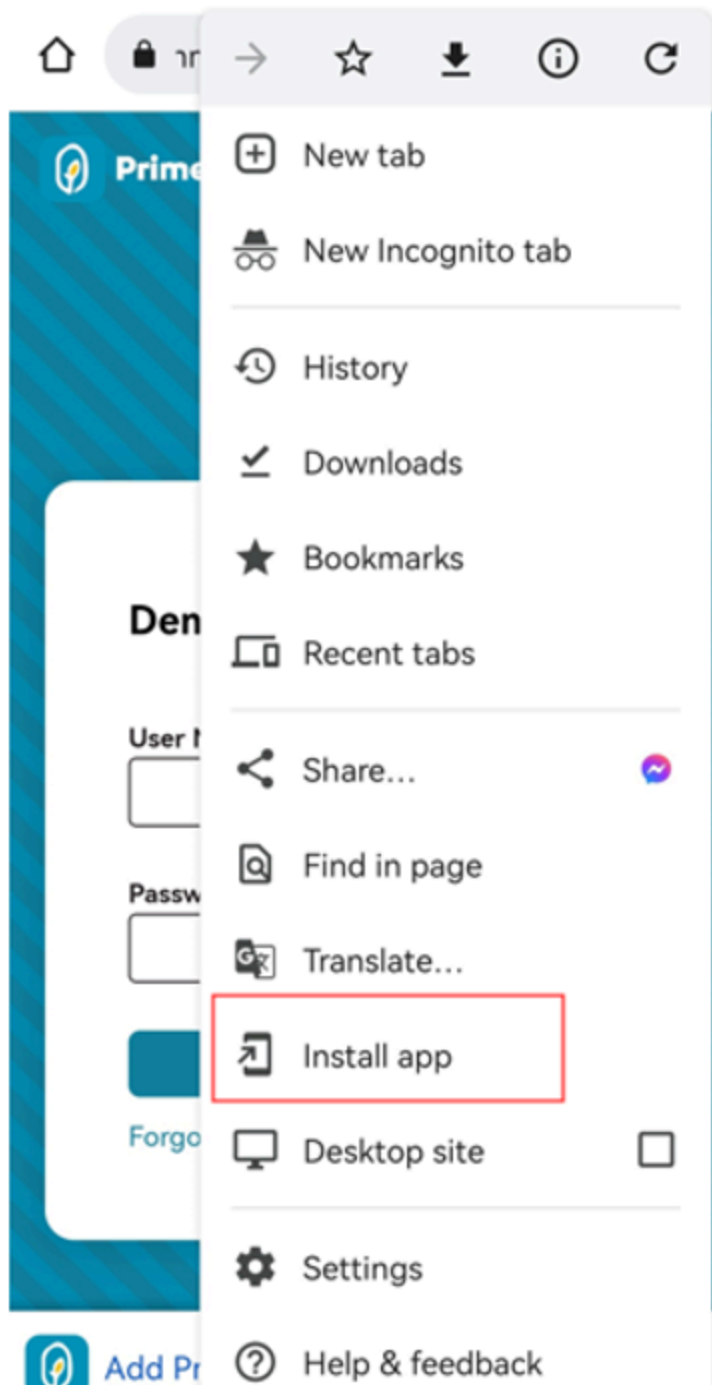
4. You will have Primero now saved on your home screen

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 will have Primero now saved on your home screen.

Navigating Record Lists

Searching for Records

The screenshot displays the Primero record list interface. At the top right, a search bar is highlighted with a red rectangle, containing a magnifying glass icon, the text "Search", and a close "X" button. Below the search bar, there are tabs for "FILTERS" and "SAVED SEARCHES". Under the "FILTERS" tab, there are buttons for "APPLY", "SAVE", and "CLEAR". Below these buttons, there are three filter sections: "Age Range", "Sex", and "Case Plan", each with a dropdown arrow. On the left side, there is a table of records. The table has columns for "AGE", "SEX", "REGISTRATION DATE", and "PHOTO". The first row shows a record with "ms" in the first column, "6" in AGE, "Male" in SEX, and "03-Oct-2020" in REGISTRATION DATE. The second row shows a record with "10" in AGE, "Male" in SEX, and "02-Oct-2020" in REGISTRATION DATE. The third row shows a record with "nswoggler" in the first column, "7" in AGE, "Female" in SEX, and "24-Sep-2020" in REGISTRATION DATE. Above the table, there is a "Rows per page" dropdown set to "20" and a "1-20 of 23" indicator. There are also navigation arrows for the table.

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 only open cases, not 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.

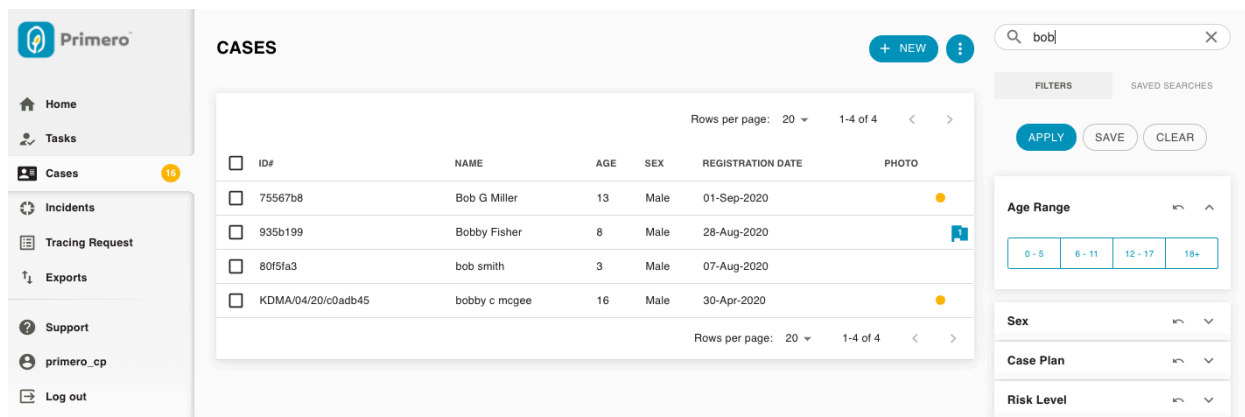
If a case worker searches “John” OR “Doe”, the case list will return names such as “John Jack” or “Jane Doe”.

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: With the new React UI in v2, if you select the “back” button in the browser, the results of the search will be cleared.

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).



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

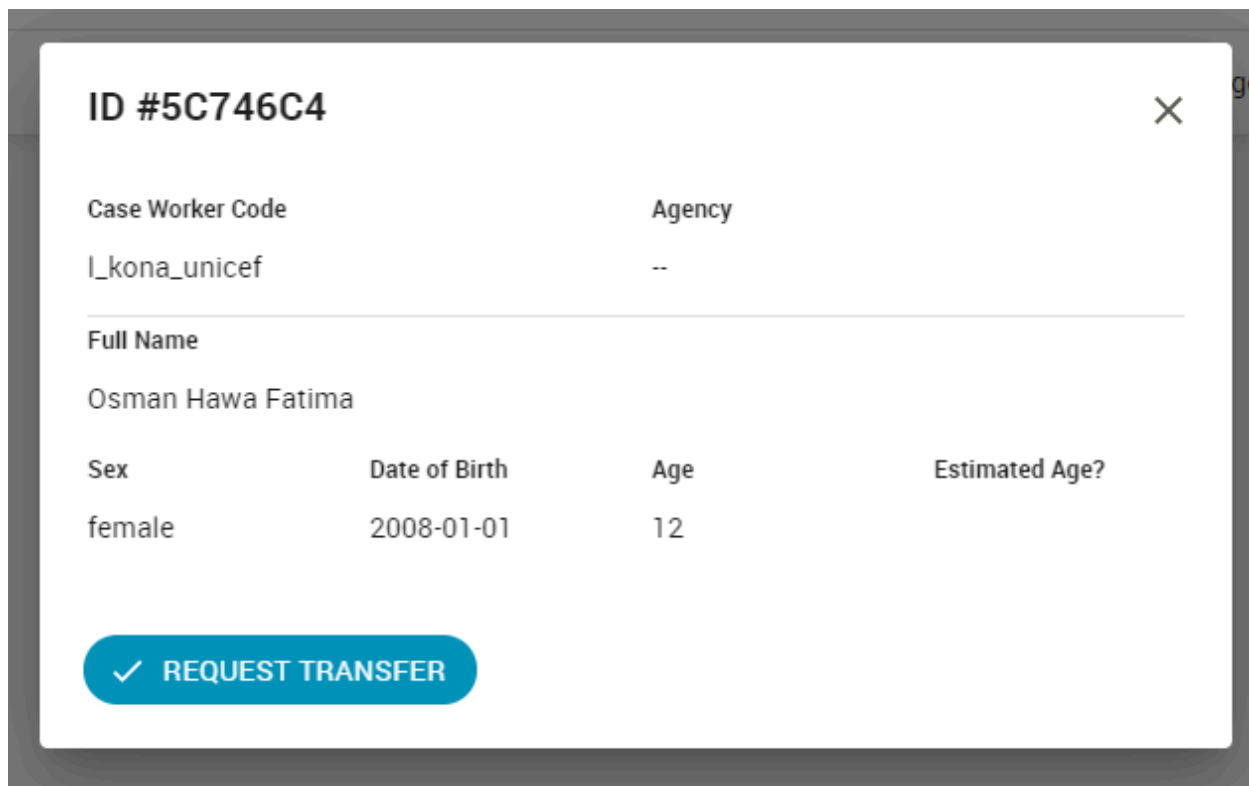
- If they have full access, they arrive at the View Case page.
- If they *do not* have full access, the **View Details** modal appears.

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
I_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 / Disabled^[2]" filters.

+ New



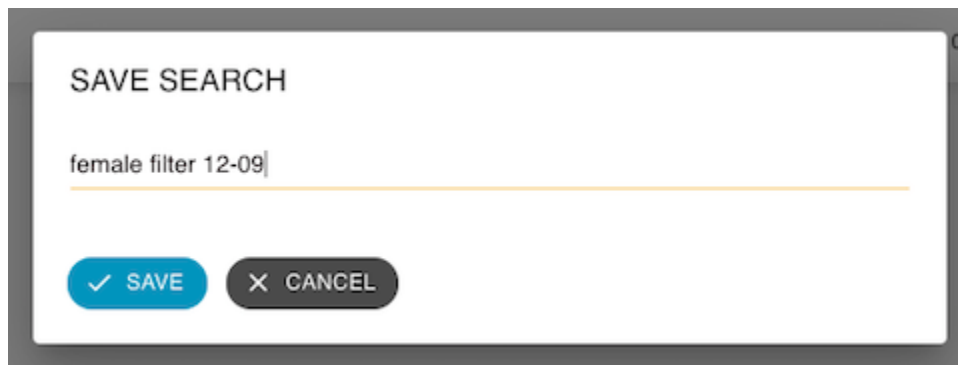
1

Age Range	 
Sex	 
Gender	 
Case Plan	 
Risk Level	 
No Activity	 
Status	 
☒ Open ☐ Closed ☐ Transferred ☐ Duplicate	
Enabled / Disabled	 
Enabled Disabled	

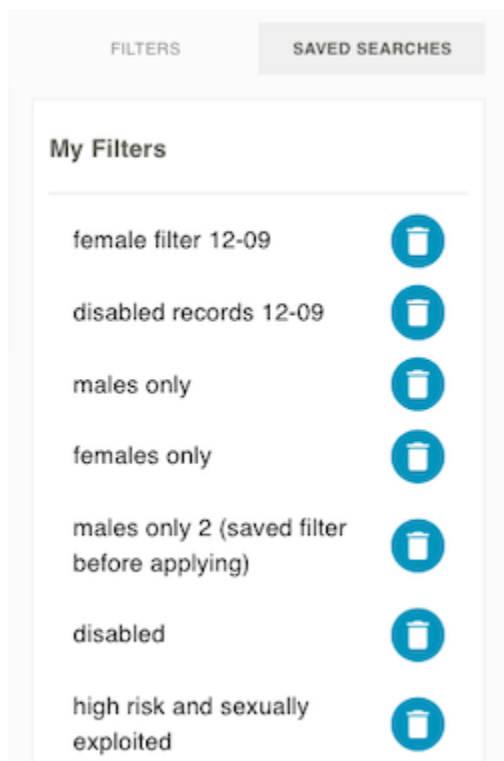
The most-commonly-used filters are always visible at the top of the Filters Panel. To expose more specific filters, click the "More" button below the panel. To re-hide these, click "Less".

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.



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.



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.

The screenshot shows the 'CASES' page in the Primero application. On the left is a sidebar with navigation links: Home, Tasks, Cases (15), Incidents, Tracing Request, Exports, Support, primero_cp, and Log out. The main area displays a table of cases with columns: ID#, NAME, AGE, SEX, REGISTRATION DATE, and PHOTO. The table lists 10 cases, including Michael Williams, John Baker, Denise G Cornswoogler, Andrea Ambergis, Tom Smith, Milton Evenbrockle, Bob G Miller, harold tulip marcus, olaf smeivit durgunsen, and yasmin khouri. On the right, there are filter and saved searches sections. The filters section includes buttons for APPLY, SAVE, and CLEAR, and dropdown menus for Age Range, Sex, Case Plan, Risk Level, No Activity, and Status. The Status dropdown is currently set to 'Open'.

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.

The screenshot shows the 'View Case' page for Case ID: eed093a. At the top, there are tabs for the case stages: New, Assessment (2), Case Plan (3), Service provision (4), and Closed (5). On the right, there are buttons for 'Flags' and 'Edit' (highlighted with a red box). The main content area is divided into a left sidebar with a menu and a right section for details. The menu includes Record Information, Interpreter Agreement, Intake Assessment, Intake (selected), Protection Eligibility, and Consent & Registration. The right section, titled 'Intake', shows the 'Date Intake' as 29-Nov-2024 and the 'Client Code' as 00001234.

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: eed093a

Cancel Save

1 New 2 Assessment 3 Case Plan 4 Service provision 5 Closed

Record Information ^

Interpreter Agreement

Intake Assessment v

Intake

Protection Eligibility

Consent & Registration

Risk Assessment

Intake

Date Intake *
29-Nov-2024
dd-mmm-yyyy

Client Code *
00001234

Case Code

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

Online CONNECTED

Home

Cases 6

Case ID: eed093a

Cancel Save

1 New 2 Assessment 3 Case Plan 4 Service provision 5 Closed

Record Information ^

Interpreter Agreement

Intake Assessment v

Intake

Intake

Date Intake *
29-Nov-2024
dd-mmm-yyyy

- **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 "Date of Assessment" field on the Risk Assessment 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.
- **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 Primero application interface. On the left is a sidebar with navigation options: Home, Tasks, Cases (highlighted with a yellow circle and a '1'), Exports, Support, Field Mode (toggle), and a user profile section. The top navigation bar shows the case ID '6583d8a' and a progress bar with five steps: New, Assessment (active), Case Plan, Service provision, and Closed. The main content area is divided into two panels. The left panel, titled 'Intake', contains a list of forms grouped under expandable headers: 'Record Information', 'Interpreter Agreement', 'Intake Assessment' (expanded), 'Risk Assessment', 'MHPSS', 'Case Plan', 'Safety Plan', 'Case Closure', 'Case Notes', and 'Other Documents'. The 'Intake Assessment' group is highlighted with a red rectangle. The right panel, also titled 'Intake', displays form fields for 'Date Intake' (04-Feb-2025), 'Client Code' (2425), 'Case Code' (6583d8a), 'Case Status' (Open), 'Case Reopened?' (checkbox), and 'Geographic location intake' (Ukraine:Autonomous Republic of Crimea:Bakhchys).

You will notice that some Forms appear under a collapseable header. This is called a **Form Group**. In the above image, "Intake Assessment" is a Form Group, which contains a number of Forms, including "Intake," "Protection Eligibility," and "Consent and Registration." 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.

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 taken to the Intake form to enter data concerning the individual's basic information, protection eligibility, and consent.

Primero

Online CONNECTED

Home

Tasks

Cases 1

Exports

Support

Field Mode: Off

pcm-cw1

Log out

New Case Cancel Save

Record Information

Interpreter Agreement

Intake Assessment

Intake

Protection Eligibility

Consent & Registration

Case Closure

Intake

Date Intake *
11-Apr-2025

Client Code *

Case Code

Case Status
Open

Case Reopened?
☐ Yes

Geographic location intake
(Select...)

Interpreter Code

Selections made on the consent and communication will appear on the “Consent & Registration” form.

Selections made on protection eligibility will appear on the “Protection Eligibility” form and determine if you can move forward with accessing the other case files. Depending on how you answer “Based on the client’s responses, what are the next steps?,” you will either be able to continue with protection case management and complete the “Risk Assessment” forms or a message will appear prompting you for referral options.

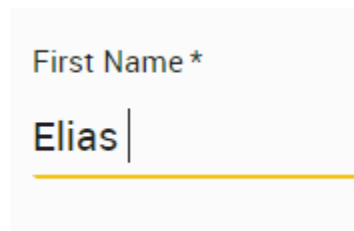
Once you have reached the new case page, you can navigate to different forms as described in the “Navigating Case Forms” section.

Editing a Case

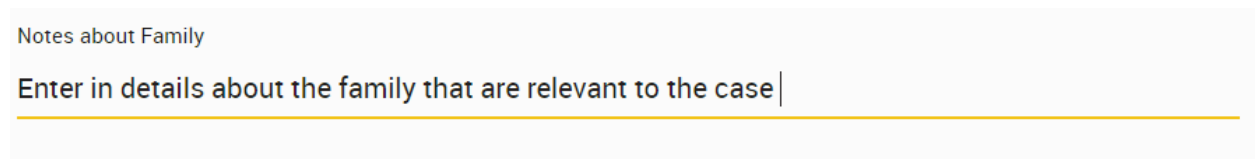
To edit a case, enter the case record and click the **EDIT** button. The page will then allow you to edit information in the forms.

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 line. A thin yellow horizontal line is at the bottom of the field.

- **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 line. A thin yellow horizontal line is at the bottom of the field.

- **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

>

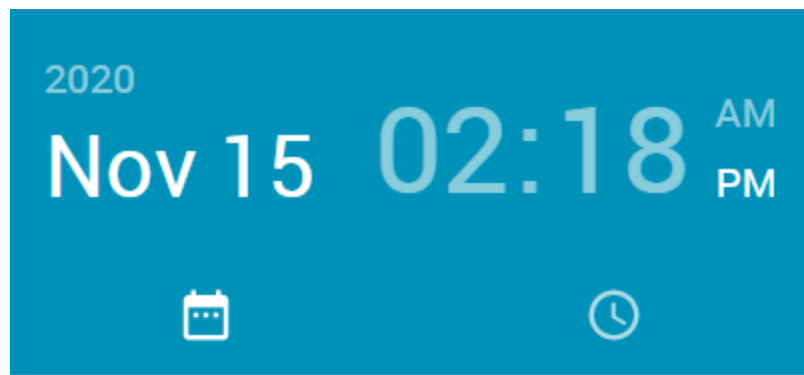
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

CLEAR

CANCEL

OK

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



< 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

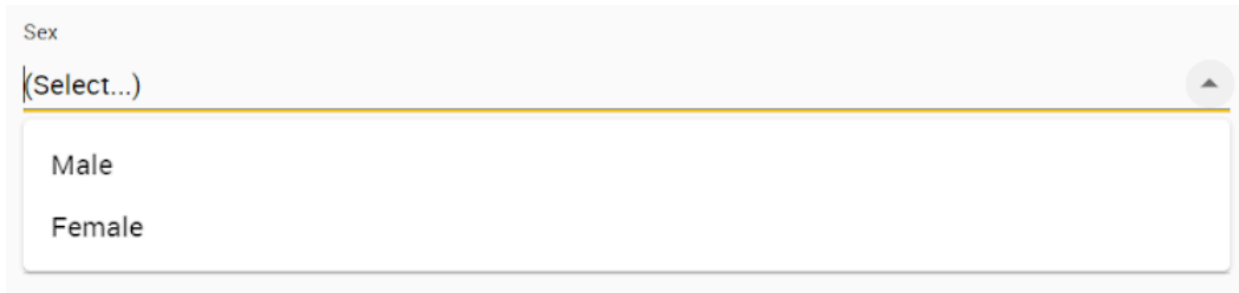
- **Tick Box** - Select the tick box if the statement in its label is true.

Is the age estimated?



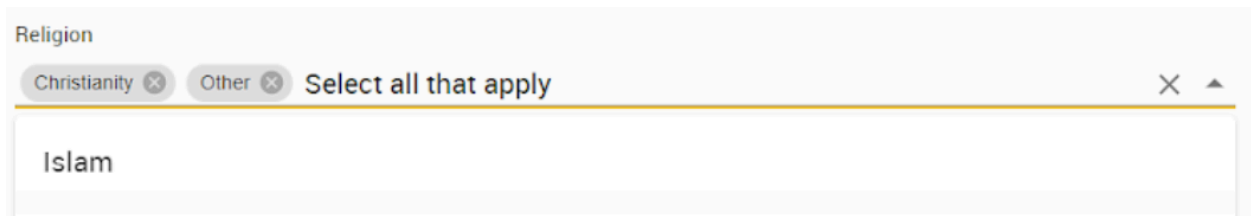
Yes

- **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.



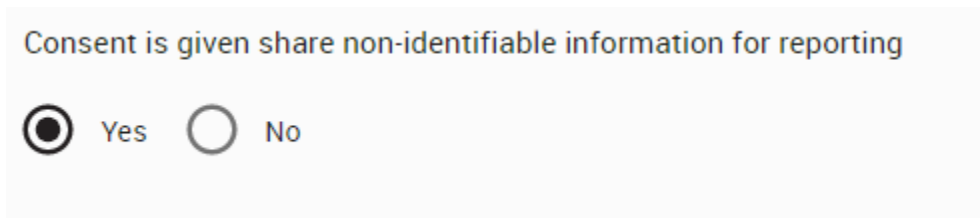
A screenshot of a form field labeled 'Sex'. The dropdown menu is open, showing two options: 'Male' and 'Female'. The text '(Select...)' is visible in the input field.

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



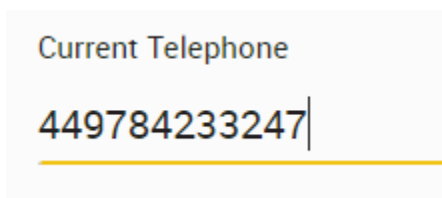
A screenshot of a form field labeled 'Religion'. The multi-select dropdown menu is open, showing two selected options: 'Christianity' and 'Other'. The text 'Select all that apply' is visible in the input field. The dropdown menu is open, showing the option 'Islam'.

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



A screenshot of a form field with the text 'Consent is given share non-identifiable information for reporting'. Below the text are two radio buttons: 'Yes' (selected) and 'No'.

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



A screenshot of a form field labeled 'Current Telephone'. The field contains the number '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.

The screenshot shows the 'New Case' form in the Primo system. The left sidebar contains navigation links: Home, Tasks, Cases (highlighted with a yellow circle and a red error indicator), Exports, Support, Field Mode (Off), pcm-cw1, and Log out. The main content area is titled 'New Case' and has 'Cancel' and 'Save' buttons. The 'Intake' section is active, showing a summary of required fields: Client Code, Full Name, Sex assigned at birth, and Age. Below this, the 'Date Intake' field is set to '11-Apr-2025' and the 'Client Code' field is empty, both with red error messages indicating they are 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.

This close-up shows two error messages. The first is for the 'Age' field, which contains the value '-3'. The error message states: 'Age must be between 0 and 130'. The second is for the 'Date of Birth' field, which contains the value '01-Jan-2023'. The error message states: '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.

The screenshot shows a field labeled 'Date Case Plan Initiated' with the value '30-Mar-2020'. Below the field, there is grey assistive text that reads: 'This field is used for the Workflow status'.

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

Washington Group Set of Questions

? Guidance

Do you have difficulty seeing, even if wearing glasses? V

(Select...)

Read out loud: "The next questions ask about difficulties you may have doing certain activities."

Do you have difficulty hearing, even if using a hearing aid? Would you say ...

(Select...)

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 Household members

+ Add



No Household members 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 "Household Members" subform, you might add information about the age and gender of the people living with the client.

How many people is the client living with?

HOUSEHOLD MEMBERS

Age

Gender

(Select...)

✓ 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.

Add Family Details

+ ADD

Abu Issam • Grandfather

>

Hala • Sister

>

Ghaid • Mother

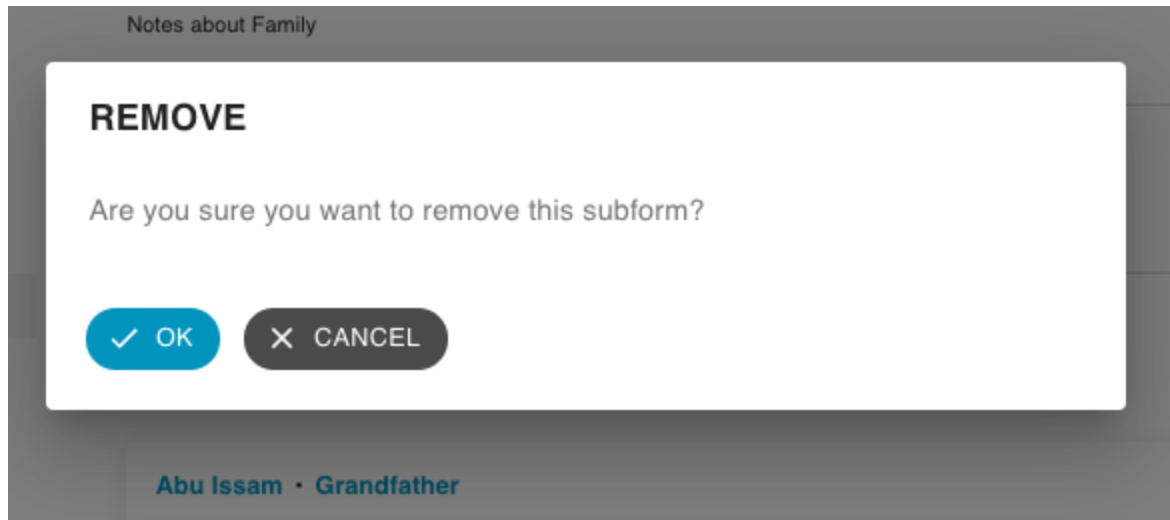
>

Issam Zeitouni • Father

>

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.



Other Documents

To upload PDF, TXT, DOC, DOCX, XLS, XLSX, CSV, JPG, JPEG, and PNG 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)

New Case

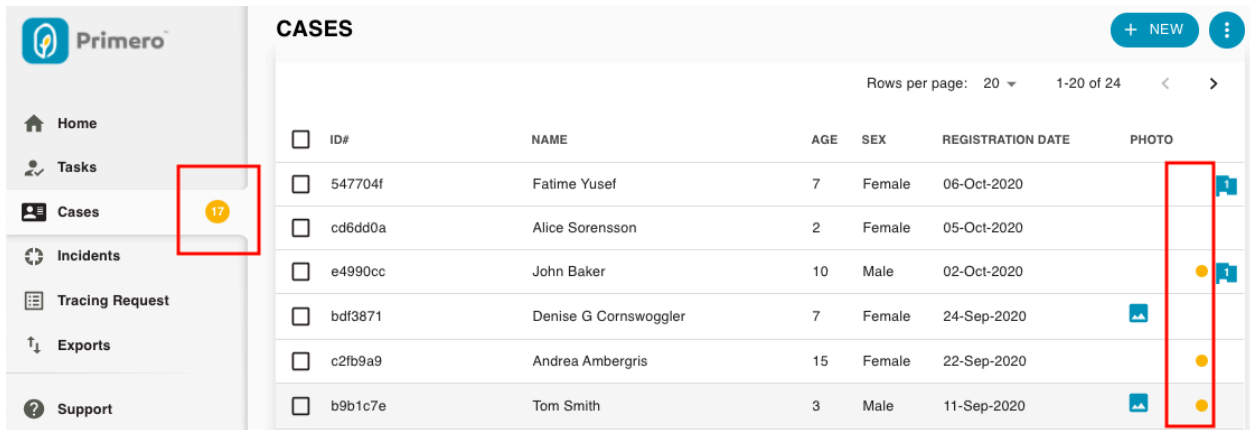
A screenshot of the "New Case" form. On the left is a sidebar with a list of sections: "Record Information", "Interpreter Agreement", "Intake Assessment", "Risk Assessment", "MHPSS", "Case Plan", "Safety Plan", "Case Closure", "Case Notes", and "Other Documents". The "Other Documents" section is highlighted in blue. The main area of the form is titled "Other Documents" and contains a sub-header "Other Document" with a "+ Add" button. Below this, a message states: "Only PDF, TXT, DOC, DOCX, XLS, XLSX, CSV, JPG, JPEG, PNG files permitted" and "No Other Document found. They need to be added." with a yellow warning icon.

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:

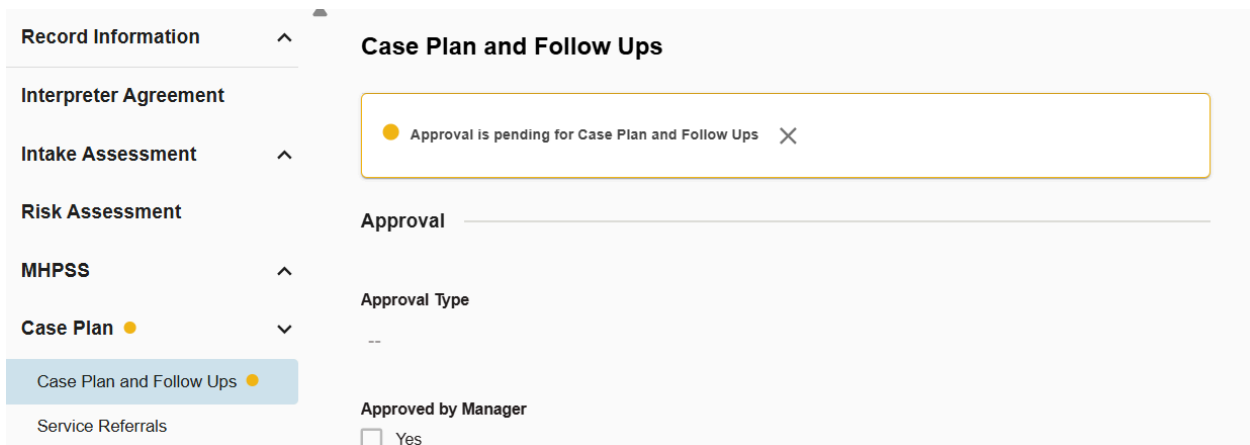
- On the Navigation Menu, an alert next to the Cases link keeps track of total cases with alerts.
- In the Case Records List, a small gold dot appears next to each Case with one or more alerts.



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 Cornsoggler	7	Female	24-Sep-2020	
c2fb9a9	Andrea Ambergris	15	Female	22-Sep-2020	
b9b1c7e	Tom 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.



Record Information	Case Plan and Follow Ups
Interpreter Agreement	
Intake Assessment	
Risk Assessment	
MHPSS	
Case Plan ●	
Case Plan and Follow Ups ●	
Service Referrals	

Approval is pending for Case Plan and Follow Ups

Approval

Approval Type

Approved by Manager

Yes

Alerts appear in any of the following situations:

- When you request approval for Protection Eligibility, 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 Management Supervisors making changes to a service or for offline case management processes where case workers want to update a case not owned by themselves.

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.

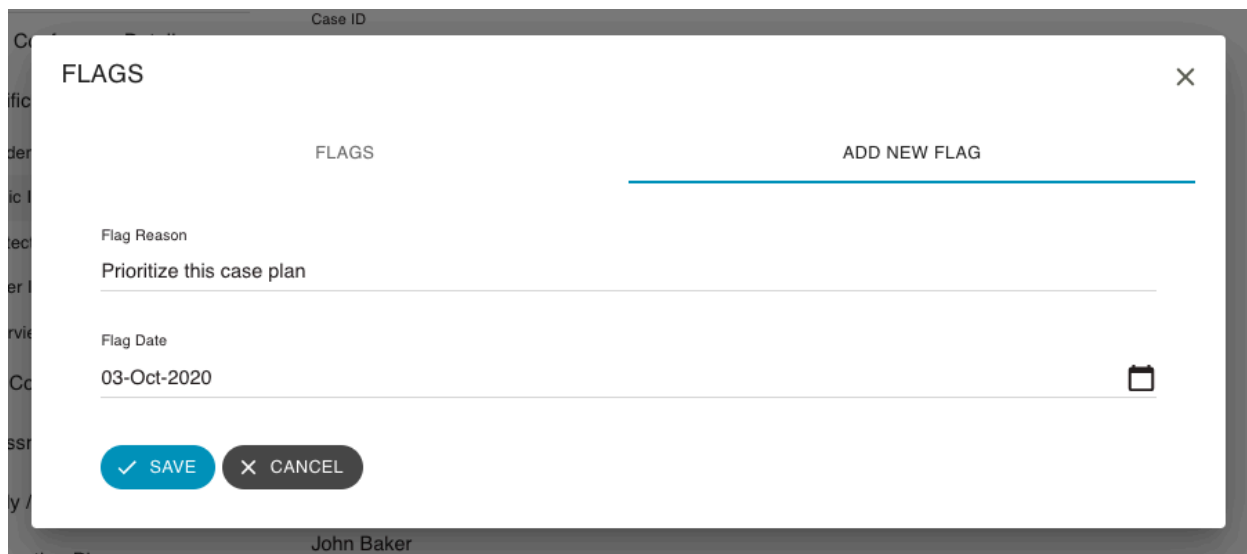
Flagging

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).



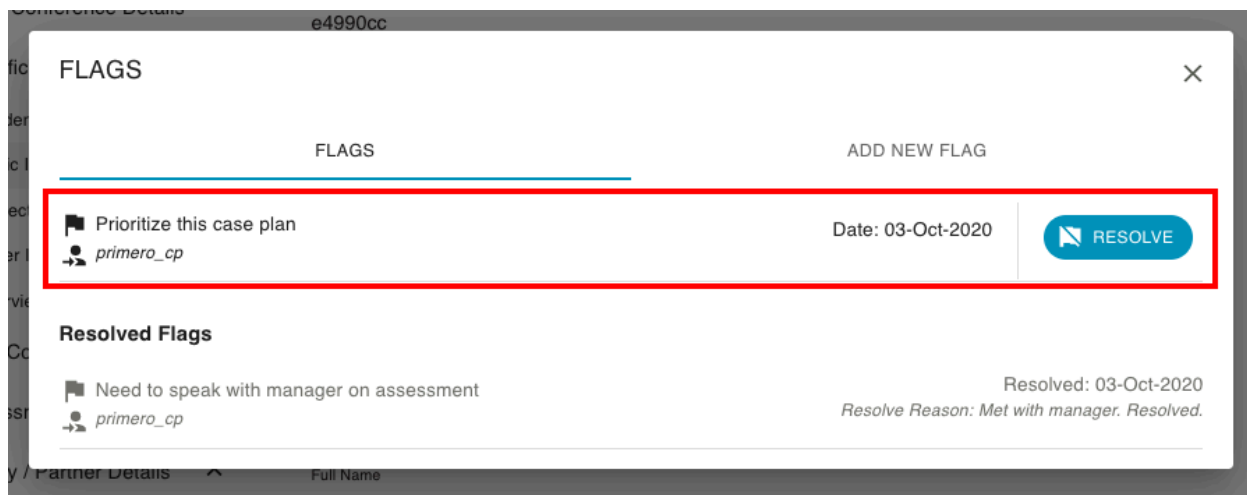
When you click the Flags button, a modal appears with two tabs: "Flags" and "Add New Flag". The "Flags" tab will open by default. Here, you will see a list of all flags that have

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.



The screenshot shows a modal window titled "FLAGS" with a close button (X) in the top right corner. It has two tabs: "FLAGS" and "ADD NEW FLAG", with the latter being the active tab. The form contains two input fields: "Flag Reason" with the text "Prioritize this case plan" and "Flag Date" with the date "03-Oct-2020". At the bottom, there are two buttons: a blue "SAVE" button with a checkmark icon and a grey "CANCEL" button with an X icon.

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



The screenshot shows the "FLAGS" modal with the "FLAGS" tab active. A red rectangle highlights a flag entry: "Prioritize this case plan" with a flag icon, a user icon labeled "primero_cp", and a date of "03-Oct-2020". To the right of the entry is a blue "RESOLVE" button. Below this, there is a section titled "Resolved Flags" showing a resolved flag: "Need to speak with manager on assessment" with a flag icon, a user icon labeled "primero_cp", and a resolve date of "03-Oct-2020". The resolve reason is "Met with manager. Resolved."

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.

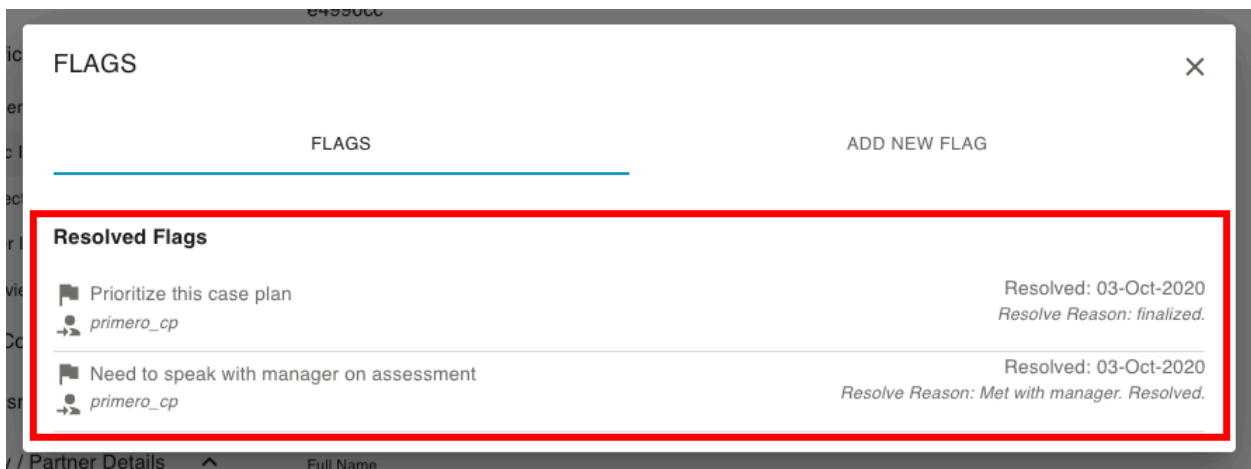


Once a flag is no longer relevant (example: your manager read the flag and approved your Case Plan as you requested), you can *resolve* the flag. To do this, click the **Resolve** button next to the flag. A modal will now appear where you can enter your reason for resolving the flag. NOTE: Only the user 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: 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: 3c7649d

✓ New 2 Assessment 3 Case Plan 4 Service provision 5 Closed

Record Information ▾

Record Information

Approvals

Incidents

Referral

Transfers / Assignments

Change Log

Interpreter Agreement

Intake Assessment ▴

Risk Assessment

MHPSS ▴

Case Plan ▴

Safety Plan

Case Closure ▴

Case Notes

Change Log

- 09-Apr-2025 20:58
Workflow Status from "New" to "Assessment"
primero
- 09-Apr-2025 20:58
assessment_due_dates from "2025-04-09" to "--"
primero
- 09-Apr-2025 20:58
Date of Assessment from "--" to "09-Apr-2025"
primero
- 09-Apr-2025 20:58
Begin Assessment? from "No" to "Yes"
primero
- 09-Apr-2025 20:58
Based on the client's responses, what are the next steps? from "--" to "A. Continue with Protection Case Management Protection Risk Assessment"
primero
- 09-Apr-2025 20:58
Has the client provided consent for this intake? from "No" to "Yes"
primero

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

- 09-Apr-2025 20:58
Date of Assessment from "--" to "09-Apr-2025"
primero
- 09-Apr-2025 20:58
Begin Assessment? from "No" to "Yes"
primero
- 09-Apr-2025 20:57
Created record
primero

Apply

Clear

Form

Risk Assessment

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**.

 **Primero**

CASE ID: 49D5A72

NEW

ASSESSMENT

CASE PLAN

4 SERVICE PROVISION

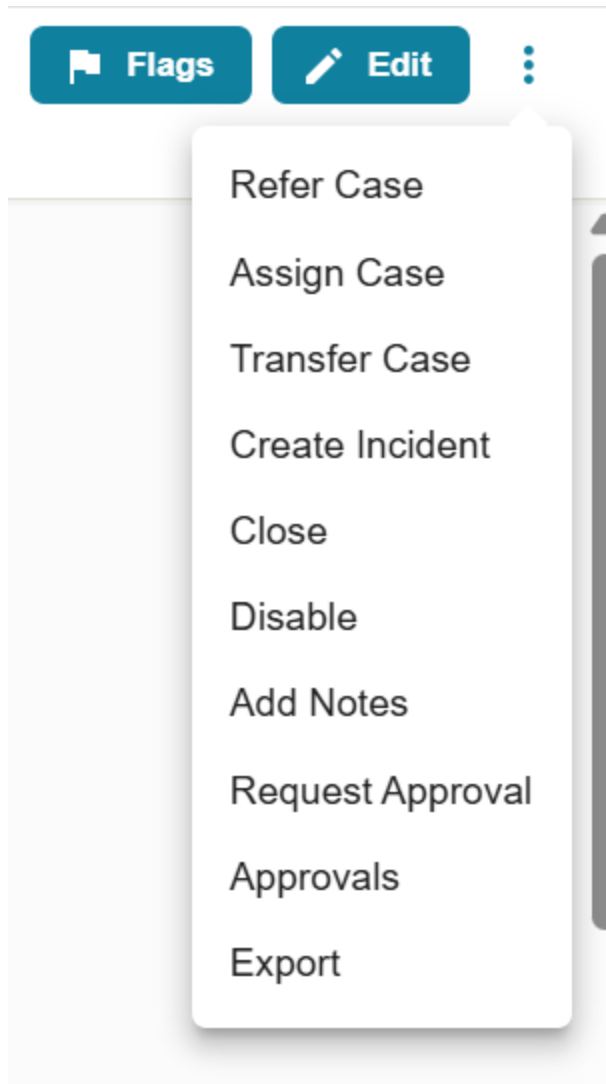
5 CLOSED

FLAGS

EDIT

Home

BASIC IDENTITY



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

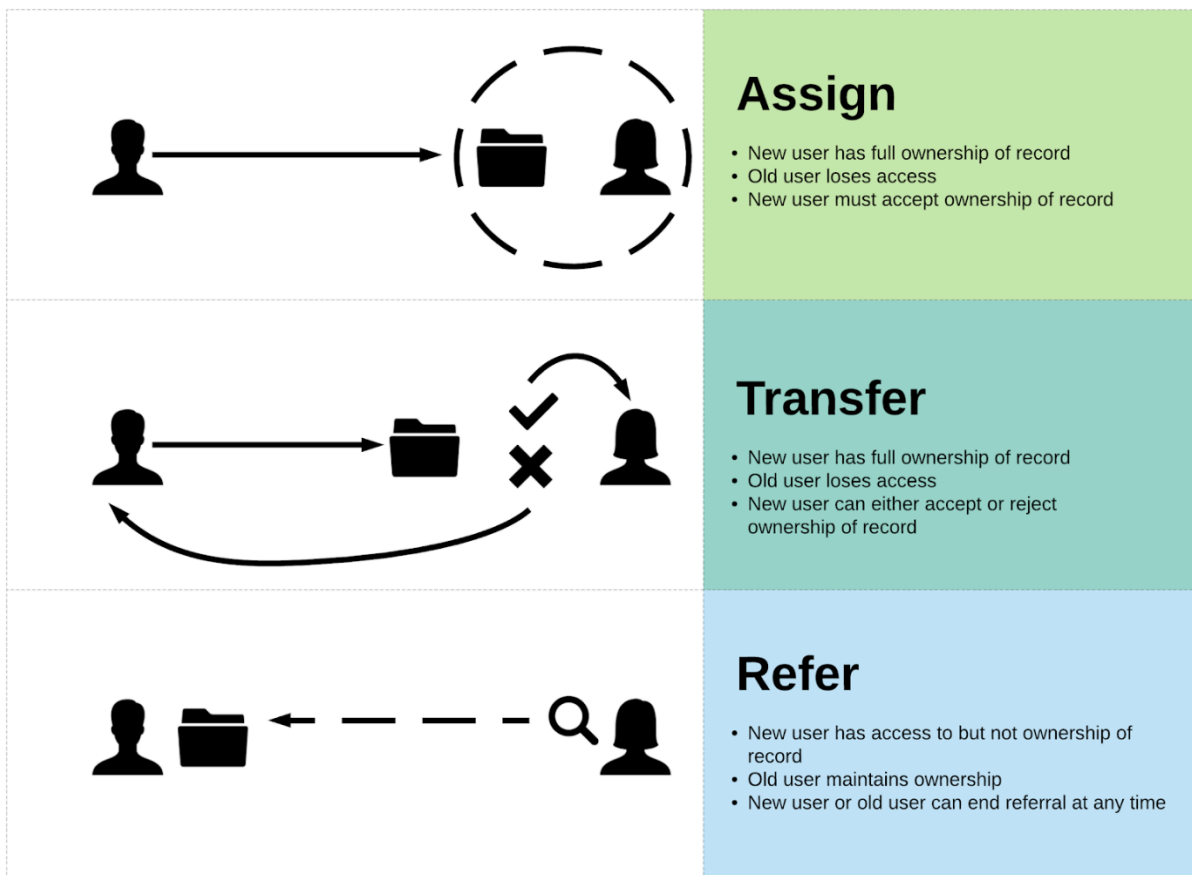
- Refer
- Assign
- Transfer
- Create Incident
- Close / Reopen
 - Note: This action will appear as "Close" if the Case is open, and "Reopen" if the Case is closed.
- Disable / Enable

- 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 Management Supervisors 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 Management Supervisors have a dashboard that can be configured onto their home page which displays cases that need to be assigned. It displays the number of cases owned directly by the current supervisor (and not a case worker). This dashboard assumes that supervisors 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 links: Home, Tasks, Cases (15), Incidents, Tracing Request, Exports, Support, primero_cp, and Log out. The main header shows the case ID 'UNICEF-F2508B8' and a progress bar with stages: REOPENED, ASSESSMENT, CASE PLAN, SERVICE PROVISION (active), and CLOSED. Action buttons for FLAGS, EDIT, and a menu icon 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) for the transfer is required. 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 6583D8A

×

☐ Are you transferring to a remote system?

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

Agency

Location

Recipient*

Notes

✓ Transfer

× Cancel

Documents

Geographic location intake

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 C24A277

☒ Are you transferring to a remote system?

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

Agency

Salus

Location

Recipient*

|

pcm-cm-sup

pcm-pc2

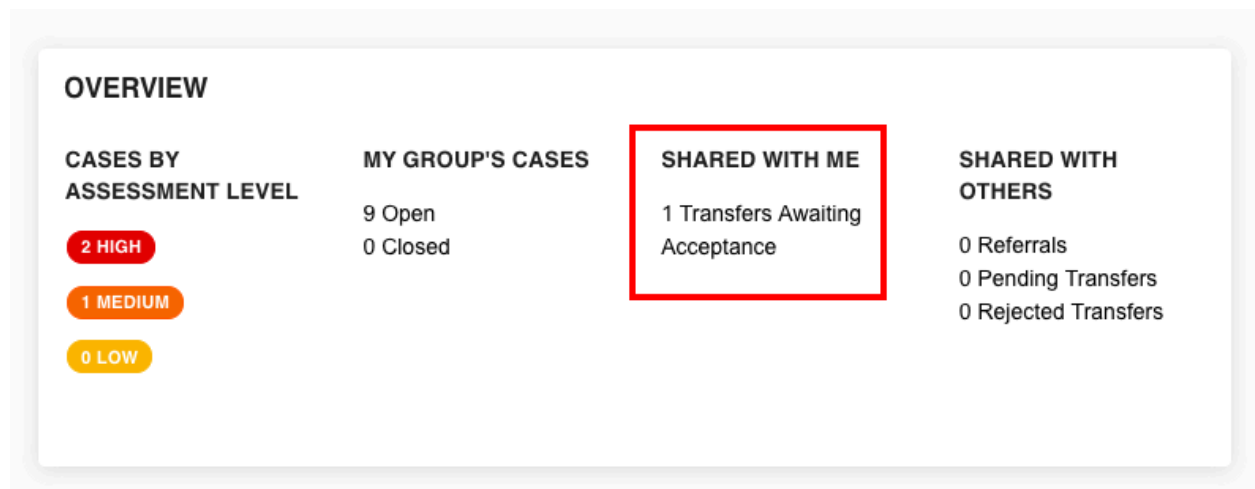
✓ Transfer

✕ Cancel

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".



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.

CASE ID: UNICEF-E4B0068

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

Record Information

Transfers / Assignments

16-Mar-2020 TRANSFER

IN PROGRESS

Recipient: primero_mgr_cp

Assigned By: primero_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

CASE ID: UNICEF-E4B0068

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

Record Information

Transfers / Assignments

16-Mar-2020 TRANSFER

IN PROGRESS

Recipient: primero_mgr_cp

Assigned By: primero_admin_cp

Consent to share setting overwritten? ☒ Yes

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

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).

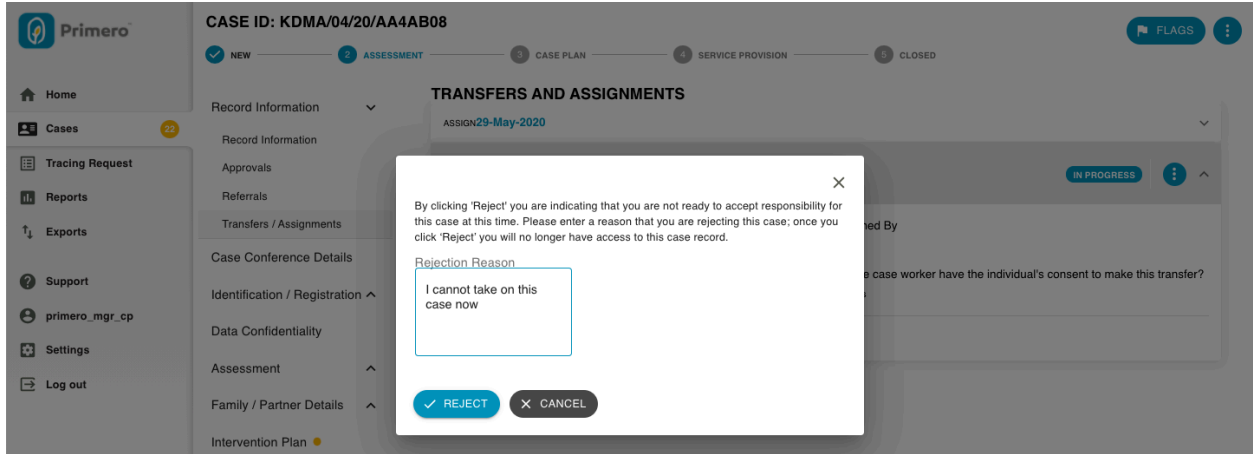
Before accepting the transfer:

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 (--), Previous Owner (primero), Previous Agency (--), and Module (primeromodule-cp).

After accepting the transfer:

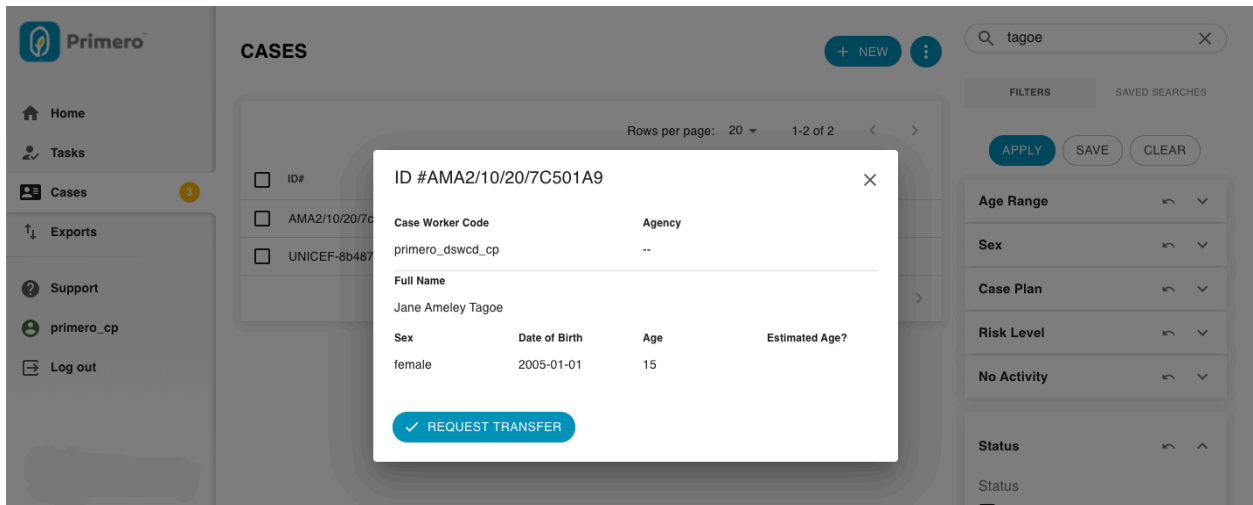
The screenshot shows the Primero interface for Case ID: UNICEF-E4B0068. The left sidebar contains navigation links: Home, Cases (22), Tracing Request, Reports, Exports, Support, primero_mgr_cp, Settings, and Log out. The main content area displays the 'RECORD INFORMATION' section. The 'Caseworker Code' 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 (--), 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 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 **Agency**

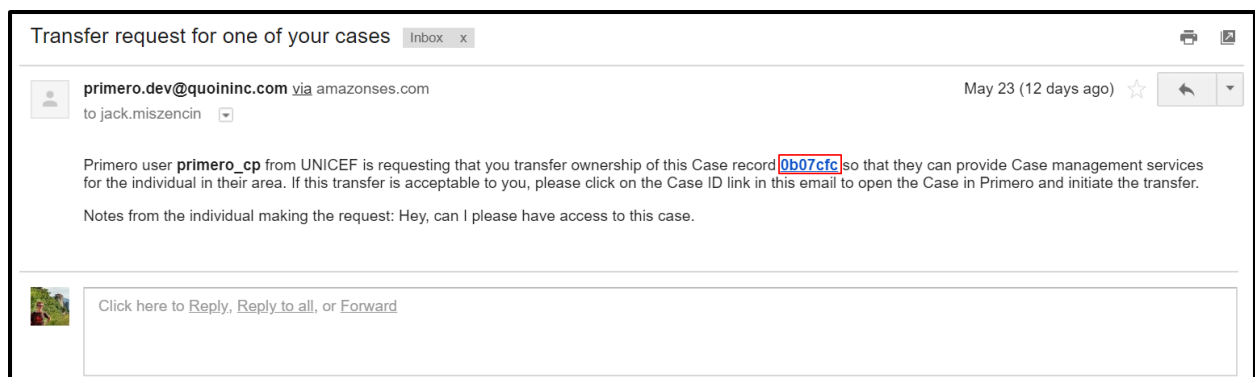
primero_dswcd_cp --

Notes *

need access

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.



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

FLAGS EDIT

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_dswcd_cp	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.

Referrals

Referring a record to another user with a Primero account 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, create a new Services subform on the "Service Referrals" form. Enter all required information, save, then click **Refer** in the **subform header**.

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 could 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.

SERVICES

X

Implementing Agency

UNHCR

Location

(Select...)

Focal Point Name

pcm-coord-unhcr

Referred?

☐ Yes

Client informed of referral?

☒ Yes ☐ No

Caregiver informed of referral?

☒ Yes ☐ No

Client consents to release information for this referral

☒ Yes ☐ No

[? Guidance](#)

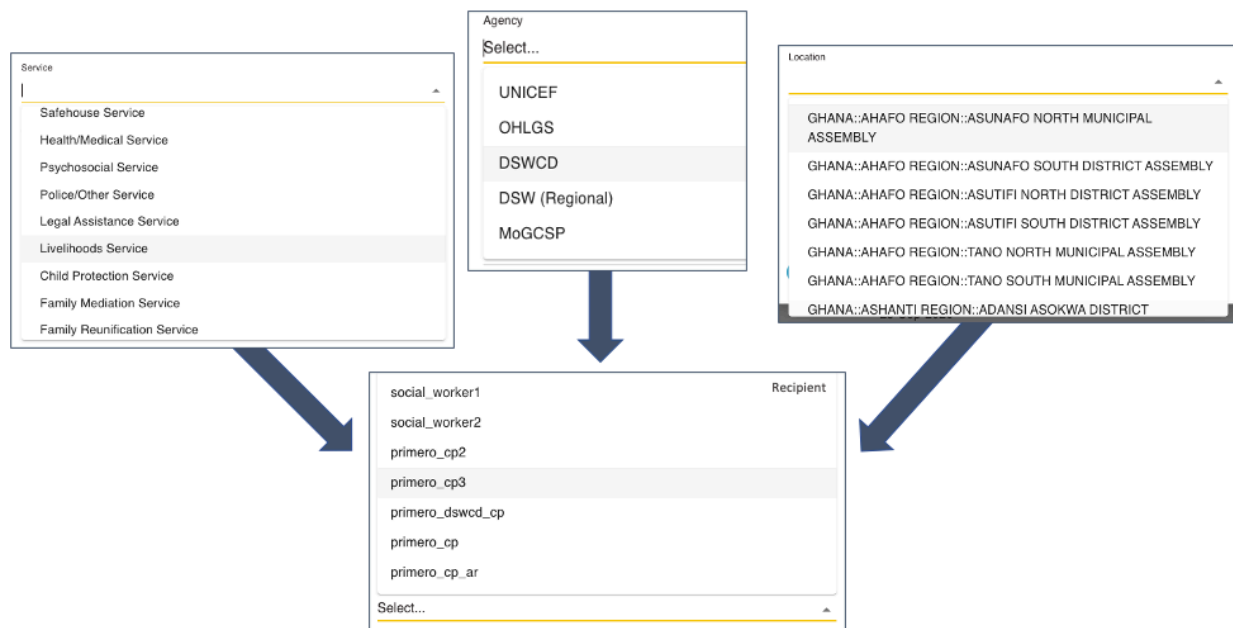
✓ Add

X Cancel

As with transfers, consent of the individual is required for referral. Consent for referral is found on the modal and confirms the individual providing consent agrees to share information about the case with other service providers.

The following fields are important for selecting a user:

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



Now, select the “Focal Point Name” - 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.

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**.

Once you complete and save the Services subform and the case file, a “Refer” button will appear in the subform header.

Services

Health	>
Health	Refer >

Are there any referrals that the client requires but are not available?

Click "Refer" to open a modal where you can add notes and confirm the referral by selecting "Refer" again. This will send the referral to the designated Recipient.

REFERRAL CASE C24A277

×

Service

Health

Agency

Salus

Location

Recipient*

pcm-pc2

Notes

✓ Refer

× Cancel

After submitting the referral, a “Refer Again” button will appear in the Services subform header.

To check the status of your referral, go to the “Referral” form under the “Record Information” form group.

Case ID: c24a277

✓ Reopened ✓ Assessment ✓ Case Plan 4 Service provision 5 Closed

Record Information

Record Information

Approvals

Referral

Transfers / Assignments

Interpreter Agreement

Intake Assessment

Risk Assessment

MHPSS

Case Plan

Safety Plan

Case Closure ●

Case Notes

Other Documents

Referrals

12-Apr-2025

REFERRAL

PENDING

Recipient

pcm-pc2

Assigned By

pcm-cw1

Consent to share setting overwritten?

✕ No

Service

Health

Agency

Salus

Notes

--

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 "Is this a referral to someone not using Primero?"

SERVICES

By When?

This field will create a reminder in the Tasks List.

Is this a referral to someone not using Primero?

☒ Yes

External referral details

Service Provider

Implementing Agency

Service Location

Referred?

☐ Yes

✓ Update

✕ Cancel

To refer, save this form and select the “Refer” button that appears.

The "Type of Recipient" 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 "CP Service Provider." Selecting this option will produce a non-encrypted PDF export file which only contains the information a Child Protection Service Provider would be able to see in Primero. In the example below, we have chosen a generic "Referral" type.

REFERRAL CASE C24A277 ✕

☒ Are you referring to a remote system?

Type of Recipient *

Referral ✕ ▾

Service

Health ▾

Agency

Salus

Location

Kyiv

Recipient

Provider

Notes

✓ Refer ✕ Cancel

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.

Case ID: c24a277

✓ Reopened ✓ Assessment ✓ Case Plan 4 Service provision 5 Closed

Record Information

Record Information

Approvals

Referral

Transfers / Assignments

Interpreter Agreement

Intake Assessment

Risk Assessment

MHPSS

Case Plan

Safety Plan

Case Closure

Case Notes

Other Documents

Referrals

12-Apr-2025

REFERRAL

PENDING

⋮

Revoke

Recipient	Assigned By
pcm-pc2	pcm-cw1
Consent to share setting overwritten?	Service
☒ No	Health
Agency	
Salus	
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 *Revoked* to indicate that the referral has been closed and the recipient no longer has Case access.

Case ID: c24a277

✓ Reopened ✓ Assessment ✓ Case Plan 4 Service provision 5 Closed

Record Information

Record Information

Approvals

Referral

Transfers / Assignments

Interpreter Agreement

Intake Assessment

Risk Assessment

MHPSS

Case Plan

Safety Plan

Case Closure

Case Notes

Other Documents

Referrals

12-Apr-2025 REFERRAL

REVOKED

Recipient

pcm-pc2

Assigned By

pcm-cw1

Consent to share setting overwritten?

✗ No

Service

Health

Agency

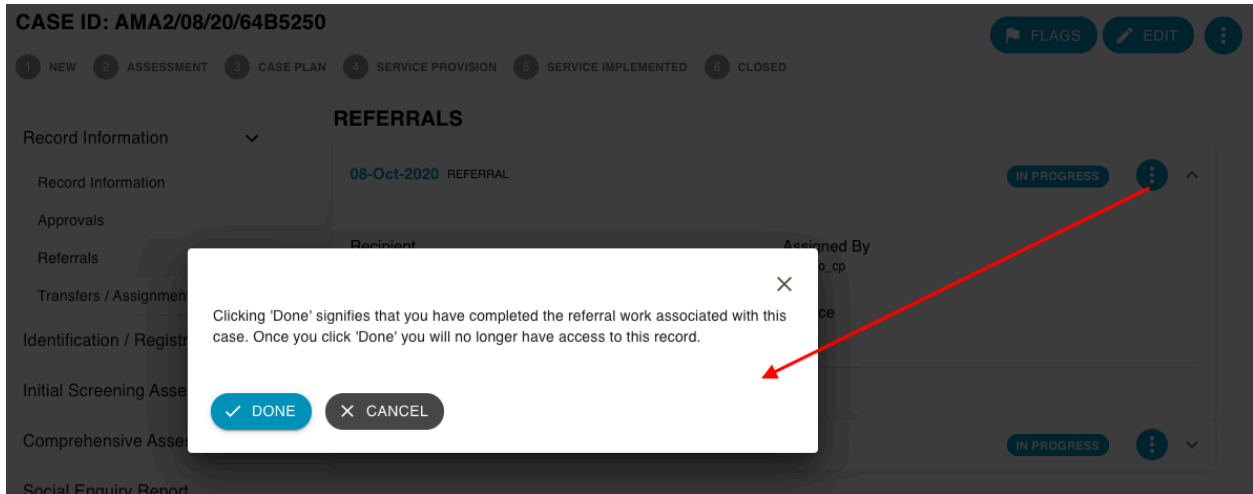
Salus

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.

NEW INCIDENT

Associated Case: [87ec3c9](#)

CP INDIVIDUAL DETAILS

Record Information ^

CP Incident

Perpetrator Details

CP Individual Details

Age
12

Sex
Female

Nationality
Select all that apply

National ID Number
111

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.

CASE ID: 87EC3C9

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

FLAGS

Record Information

Record Information

Approvals

Incidents

Referrals

Transfers / Assignments

Change Log

Case Conference Details

Identification / Registration

Data Confidentiality

INCIDENTS

+ NEW

24-Nov-2020 Physical Assault

12-Jan-2021 Sexual Assault

Date of Interview
13-Jan-2021

Date of Incident
12-Jan-2021

Type of Violence
Sexual Assault

VIEW

EDIT

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.

Incident ID 90b2e4f

Flags Edit

Assign Incident

Disable

Export

Link Incident to Case

Record Information

Summary of the Incident

Incident

Violations Forms

Other Forms

Incident

Long ID
38dffbc8-5ca4-49a2-b2ce-47b7f90b2e4f

Incident ID
90b2e4f

Incident Code
90b2e4f

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-b2ce-47b7f90b2e4f

Incident ID
90b2e4f

Incident Code
90b2e4f

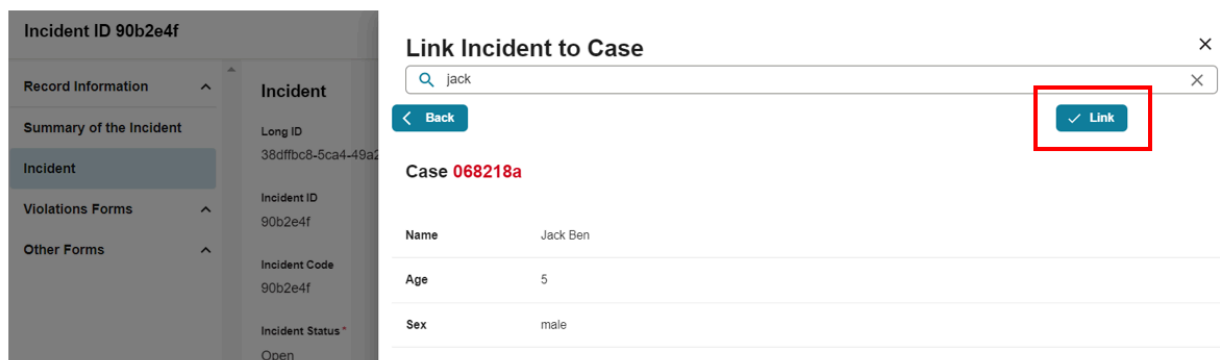
Link Incident to Case

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

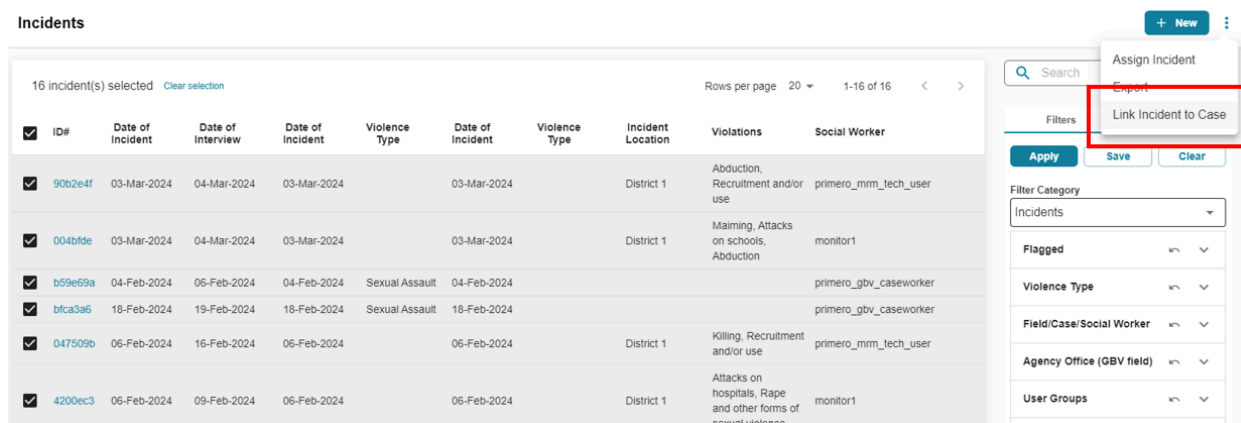
Case 068218a

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
✓	004b7de	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
✓	bfca3a6	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

Search

Assign Incident

Export

Link Incident to Case

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 a case’s 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.

CASE ID: 87EC3C9

NEW — ASSESSMENT — CASE PLAN — SERVICE PROVISION — CLOSED

FLAGS

Record Information

Record Information

Approvals

Incidents

Referrals

Transfers / Assignments

Change Log

Case Conference Details

Identification / Registration

Data Confidentiality

INCIDENTS

24-Nov-2020 Physical Assault

12-Jan-2021 Sexual Assault

Date of Interview

13-Jan-2021

Date of Incident

12-Jan-2021

Type of Violence

Sexual Assault

VIEW

EDIT

+ NEW

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

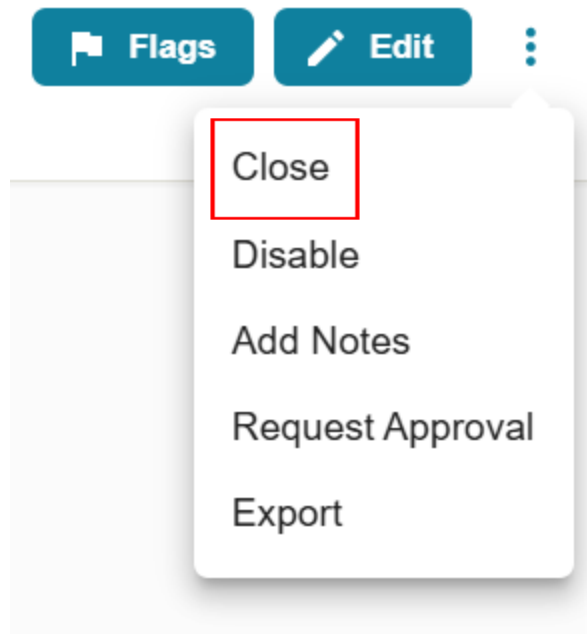
The **Close / Reopen** action allows you to change a Case's "Case Status" field. Only certain users have the ability to perform this action.

Case ID: c24a277

✓ Reopened ✓ Assessment ✓ Case Plan 4 Service provision 5 Closed

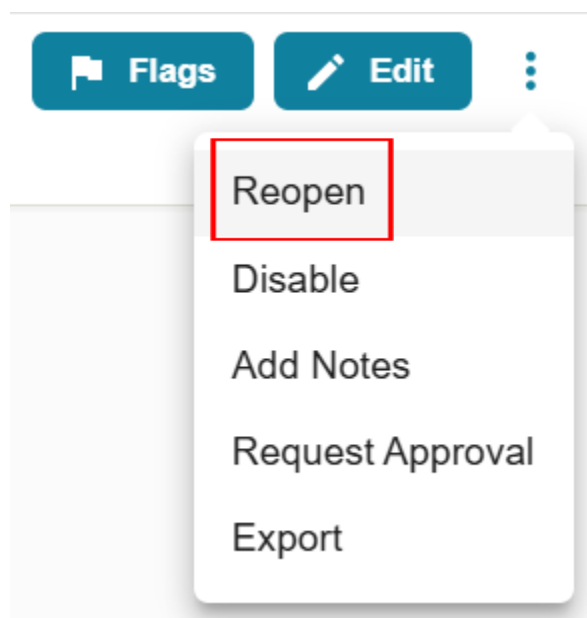
Record Information ^	Case Closure
Interpreter Agreement	Closure
Intake Assessment ^	
Risk Assessment	Case Status
MHPSS ^	Open
Case Plan ^	Date of Closure
Safety Plan	11-Apr-2025
Case Closure ●	dd-mmm-yyyy
Case Notes	Begin Case Closure?
Other Documents	☒ Yes
	Were the goals of the action plan met? *
	Completely

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".



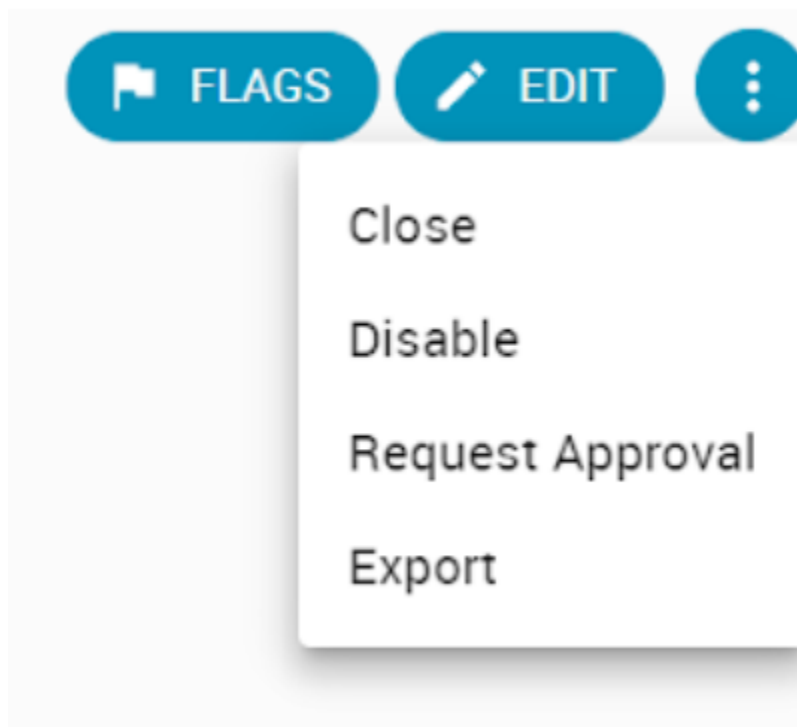
Approvals

Requesting Approval for a Form

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

- Protection Eligibility
- Case Plan
- Case 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.

Request approval for

Case Plan

✓ OK

✕ 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.

☐ c24a277 NAME 347 44 04-Feb-2025



CASE ID: 75567B8

NEW ASSESSMENT CASE PLAN SERVICE PROVISION CLOSED

FLAGS EDIT

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

INTERVENTION PLAN

Approval is pending for Intervention Plan

Approval Type

Approved by Manager

Yes

Date

dd-mm-yyyy

Manager Comments

Approval Status

Pending

Case ID: 6583d8a

☒ New
 ☒ 2 Assessment
 ☐ 3 Case Plan
 ☐ 4 Service provision
 ☐ 5 Closed

Record Information ^

Interpreter Agreement

Intake Assessment ^

Risk Assessment

MHPSS ^

Case Plan ● ^

Case Plan and Follow Ups ●

Service Referrals

Safety Plan

Case Closure

Case Notes

Other Documents

Case Plan and Follow Ups

● Approval is pending for Case Plan and Follow Ups ✕

Approval

Approval Type

--

Approved by Manager

☐ Yes

Date

--

dd-mm-yyyy

Manager Comments

--

Approval Status

Pending

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.

Case ID: 6583d8a

☒ New
 ☒ 2 Assessment
 ☐ 3 Case Plan
 ☐ 4 Service provision
 ☐ 5 Closed

Record Information v

Record Information

Approvals

Referral

Transfers / Assignments

Interpreter Agreement

Intake Assessment ^

Risk Assessment

Approvals

12-Apr-2025 Case Plan - Approval Request ^

Approval Requested For

Case Plan

Requested By

pcm-cw1

Case plan type

--

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").

Approvals		
6 PROTECTION ELIGIBILITY	6 CASE PLAN	3 CASE CLOSURE
0 Pending	3 Pending	1 Pending
0 Rejected	1 Rejected	0 Rejected
6 Approved	2 Approved	2 Approved

Approving or Rejecting a Form

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

- Protection Eligibility
- Case Plan
- Closure

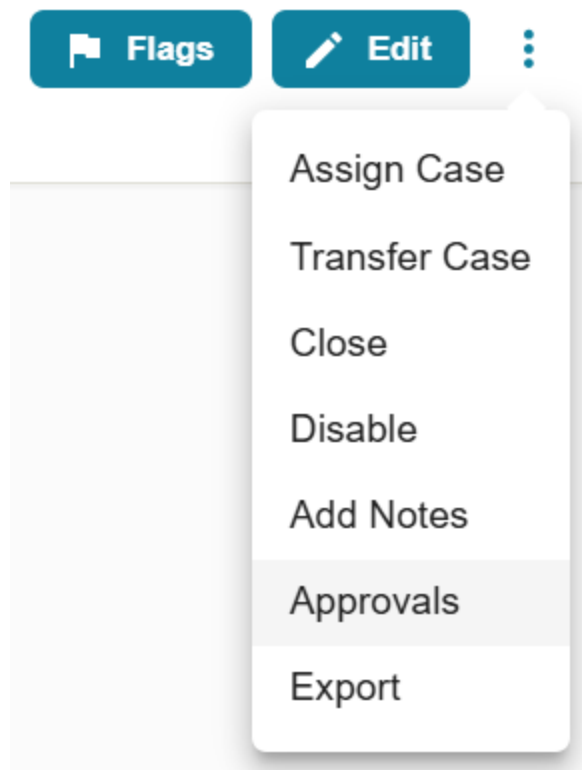
A manager can check for pending approvals in the "Approvals" section of their dashboard.

Approvals
PENDING APPROVALS
0 Protection Eligibility
1 Case Closure
3 Case Plan

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.

-F 0005

mm

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25

se

83

se

pe

se

Yes

Approve ☒ Not Approve ☐

Case Plan ▼

Comments

Very thoughtful

✓ Submit X Cancel

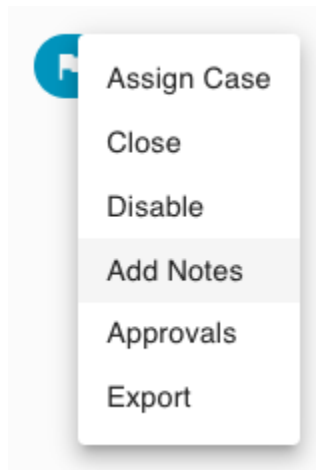
Once a manager has approved or rejected the Case Plan, the "Approval Status" on that form will update to be either "Approved" or "Rejected." The alert will also disappear from the "Case Plan" form. For both the case worker and the manager, the "Approvals" section of the dashboard will show one less pending 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.

ADD NOTES

×

Select the action(s) taken by the caseworker *

Update/New information Received ×

▼

Briefly describe any actions taken and updates regarding the beneficiary and her/his situation.

Recommendations/Actions Required

✓ Save

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: c24a277

1 Reopened 2 Assessment 3 Case Plan 4 Service provision 5 Closed

Record Information ^

Interpreter Agreement

Intake Assessment ^

Risk Assessment

MHPSS ^

Case Plan ^

Safety Plan

Case Closure ●

Case Notes ●

Other Documents

Case Notes

● Case Notes was updated on 12-Apr-2025 X

Notes

12-Apr-2025 13:48 • Update/New information Received >

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 X

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.

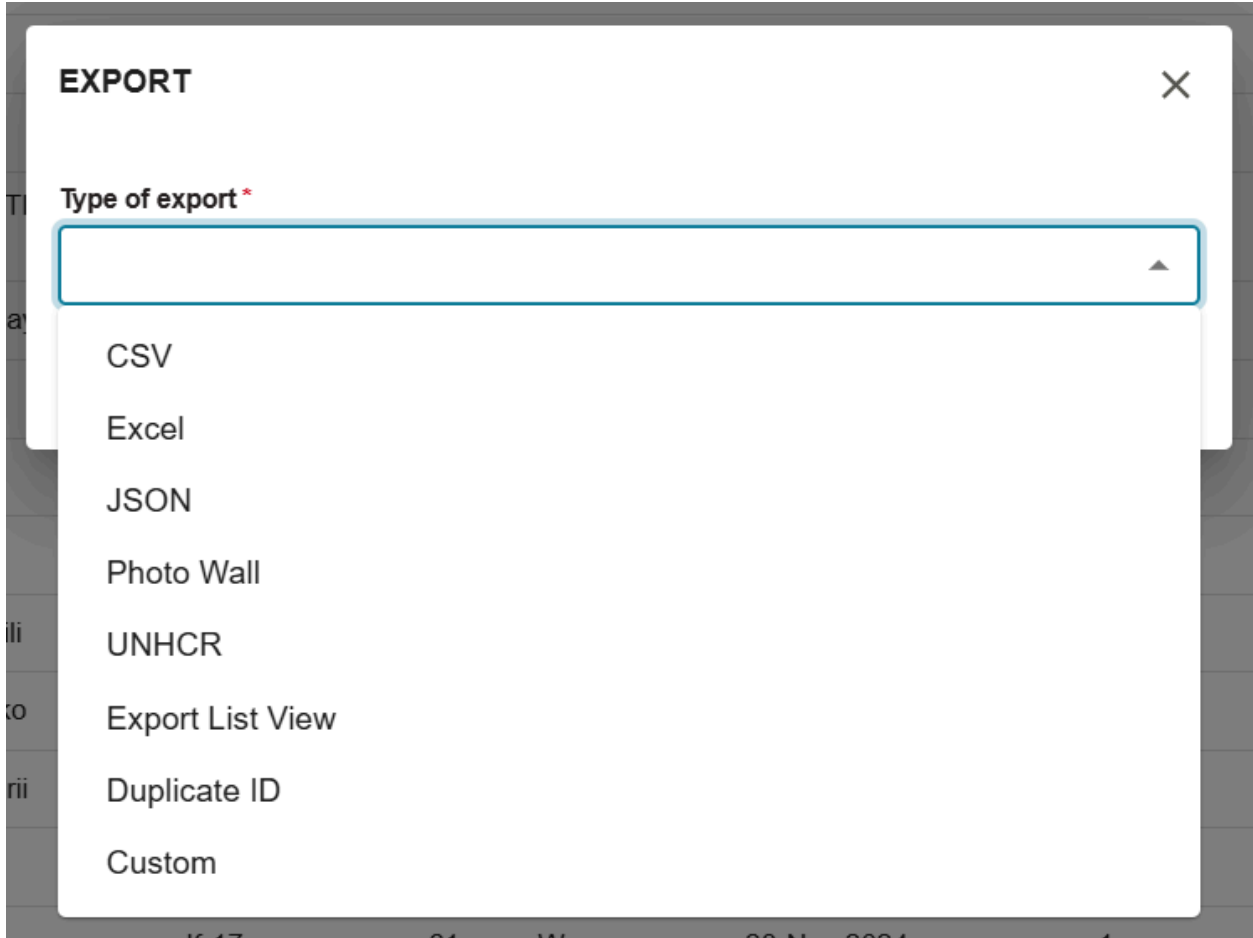
Exporting Information on Records

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/worksheet 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 - only available from within the case file. 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 and/or forms 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.



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.

EXPORT

Type of export *

Custom

Modules *

PCM

Select Format

☒ Form

☐ Field

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

Select Forms to export

Client Feedback

×

 |

×

▼

Create your own file name (Optional)

✓ Export

✕ 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

Case Plan and Follow Ups × Risk Assessment × ▾

Header

PDF Header 1

PDF Header 2

PDF Header 3

Include other logos?

▾

Include signature lines for

▾

Create your own file name (Optional)

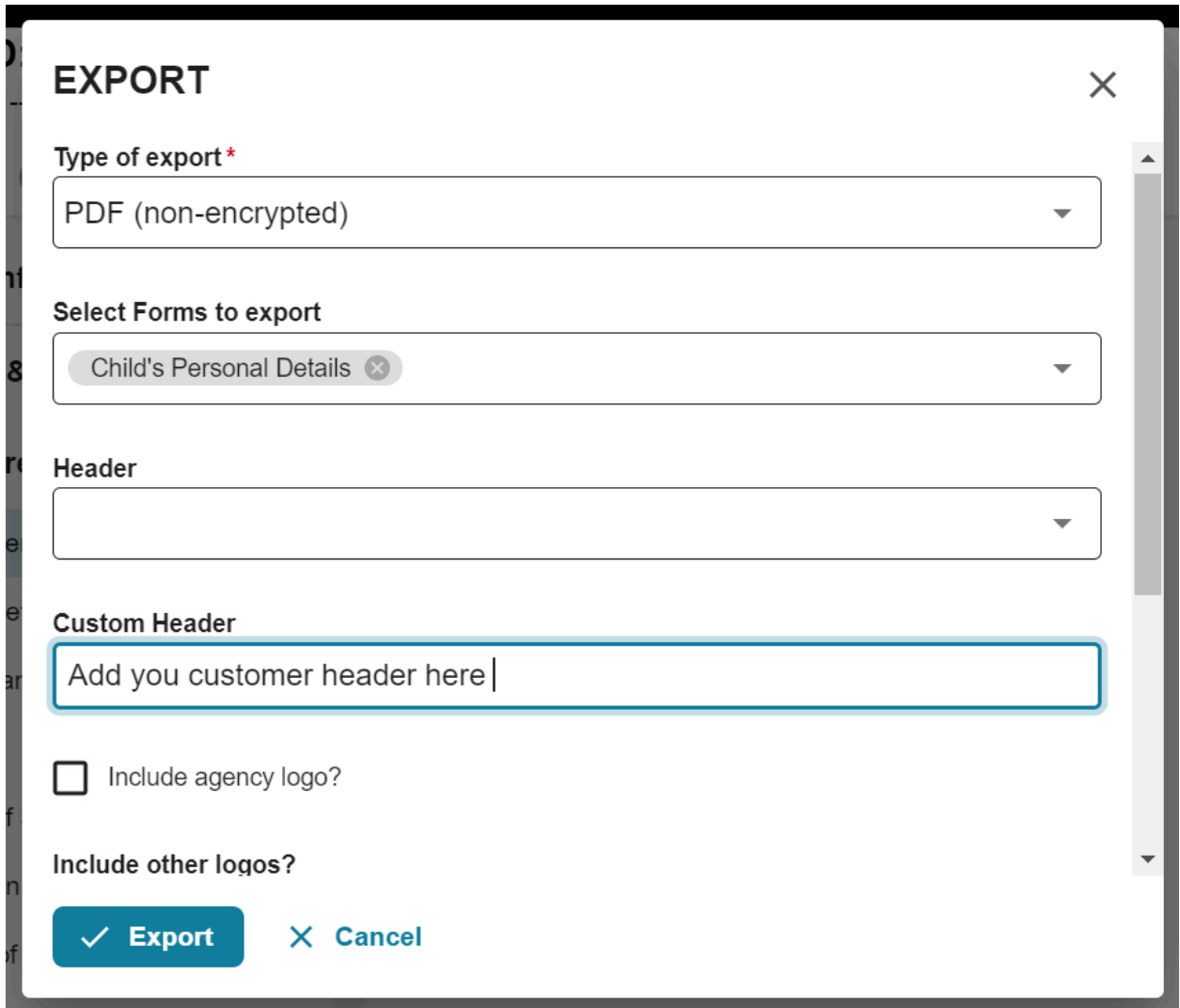
✓ Export

× 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:

PDF Header 1
Test

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



The image shows a modal dialog box titled "EXPORT" with a close button (X) in the top right corner. The dialog contains several sections: "Type of export *" with a dropdown menu showing "PDF (non-encrypted)"; "Select Forms to export" with a dropdown menu showing "Child's Personal Details" and a close button (X); "Header" with an empty text input field; "Custom Header" with a text input field containing the placeholder text "Add you customer header here"; a checkbox labeled "Include agency logo?" which is unchecked; and a section labeled "Include other logos?". At the bottom, there are two buttons: a blue "Export" button with a checkmark icon and a "Cancel" button with an X icon.

EXPORT ×

Type of export *

PDF (non-encrypted) ▼

Select Forms to export

Child's Personal Details × ▼

Header

Custom Header

Add you 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:

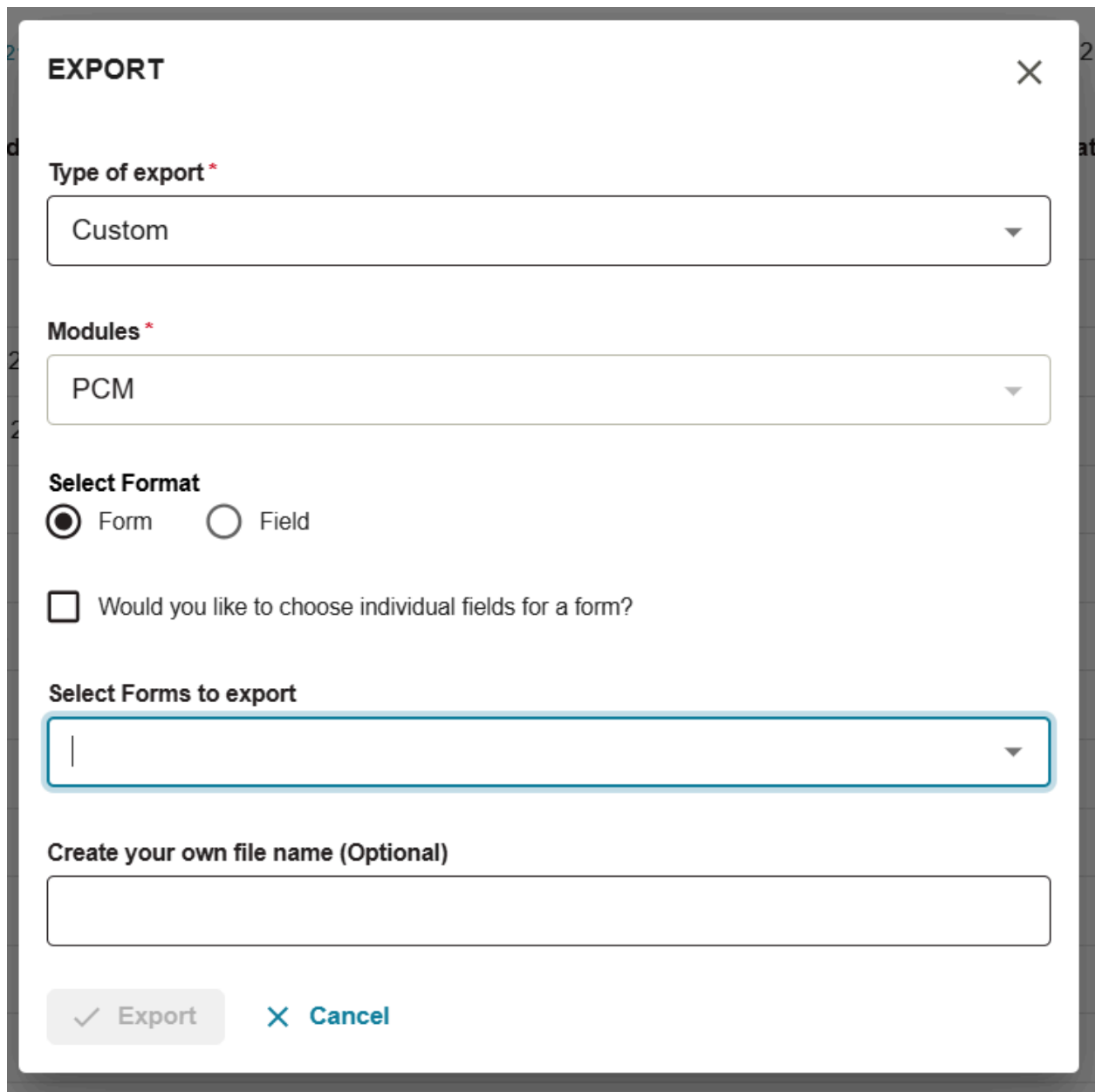
Caseworker Name

Date

Caseworker Agency

Custom Exports

If you are a supervisor, 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.

A screenshot of an 'EXPORT' dialog box. At the top left is the title 'EXPORT' and at the top right is a close button 'X'. Below the title is a section 'Type of export *' with a dropdown menu showing 'Custom'. Below that is a section 'Modules *' with a dropdown menu showing 'PCM'. Next is a section 'Select Format' with two radio buttons: 'Form' (which is selected) and 'Field'. Below the radio buttons is a checkbox labeled 'Would you like to choose individual fields for a form?'. Below the checkbox is a section 'Select Forms to export' with a dropdown menu that is currently empty. Below that is a section 'Create your own file name (Optional)' with a text input field. At the bottom left is a button with a checkmark icon and the text 'Export'. At the bottom right is a button with an 'X' icon and the text 'Cancel'.

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.

Select Format

☒ Form ☐ Field

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

Select Forms to export

Duplicate Exports

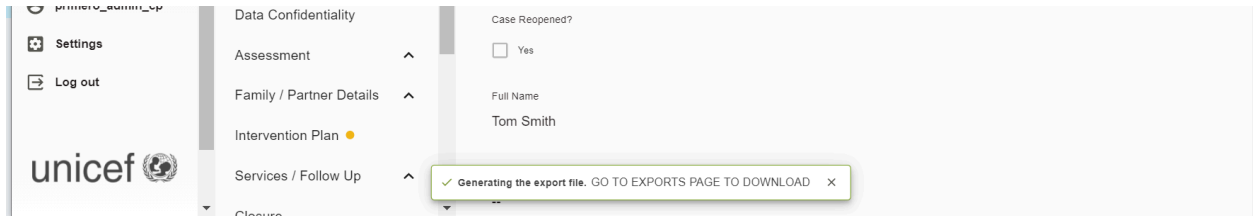
The duplicates are identified if a “national ID” type of field has the same values. Once the export is generated, the export will list: National ID No, Child Name, ProGres ID (UNHCR Number), Age, Family Size, Case ID. The duplicate report presents these other data points for validation, but the report 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-cc346707fcbb			
11	987745325	Bum, Chiang Puk	284-0009765	16		4df37bfa-8442-4ece-add4-819a0b038d1d			

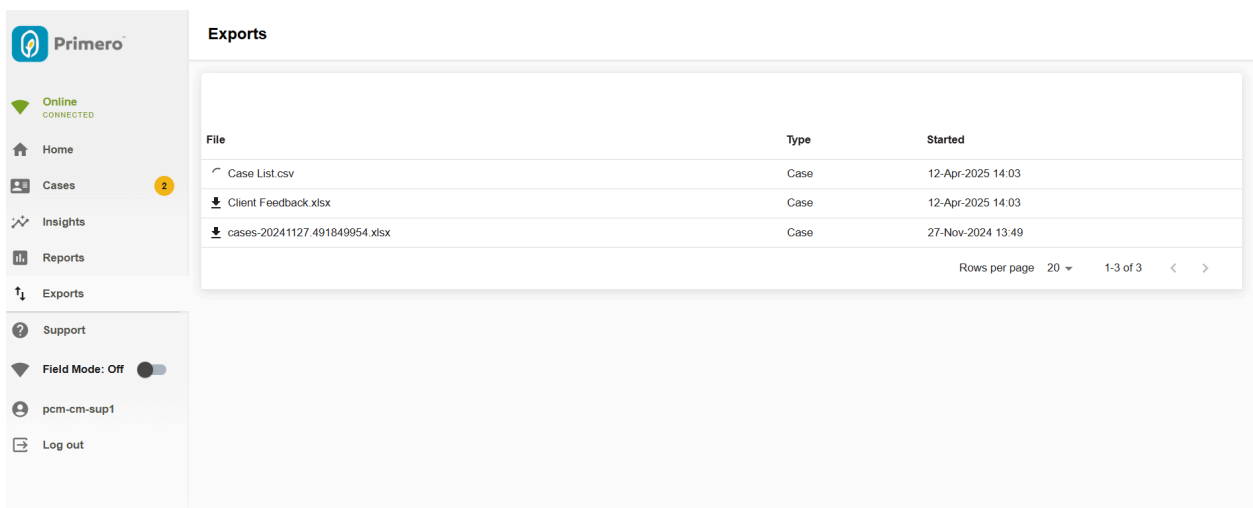
Note: the search can be configured to not be duplicate based on National ID but another ID such as a household number, etc.

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

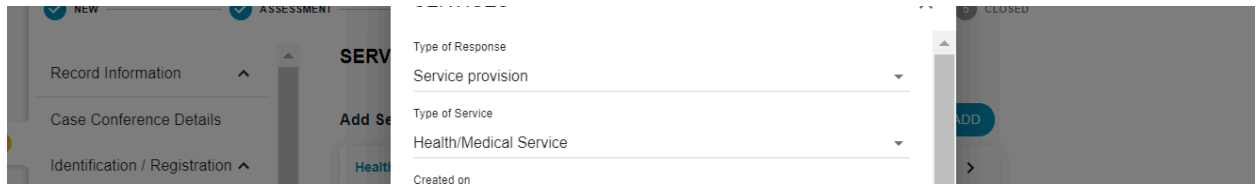
To add a service to a Case, go to the **Service Referrals** form, and click the "Add" button. A modal will appear.

The screenshot shows a 'SERVICES' modal form overlaid on a case management interface. The background interface includes a sidebar with navigation items: 'Record Information', 'Interpreter Agreement', 'Intake Assessment', 'Risk Assessment', 'MHPSS', 'Case Plan', 'Case Plan and Follow Ups', 'Service Referrals' (highlighted), 'Safety Plan', 'Case Closure', 'Case Notes', and 'Other Documents'. The top of the background shows 'Case ID: 6583d8a' and workflow steps: 'New' (checked), '2 Assessment', and '3'. The modal form itself has a title bar 'SERVICES' with a close button. It contains several fields: 'Type of Response' (dropdown menu with 'Service provision' selected), 'Type of Service' (dropdown menu with '(Select...)' selected), 'Service Referral Risk Level' (dropdown menu with '(Select...)' selected), 'Goal(s) from Case Plan Actions' (text input field), 'Created on' (calendar field showing '12-Apr-2025 14:59' with a date format hint 'dd-mmm-yyyy hh:mm' below it), and 'By When?' (calendar field with a date format hint 'dd-mmm-yyyy hh:mm' below it and a note 'This field will create a reminder in the Tasks List.'). At the bottom of the modal are two buttons: a green 'Add' button with a checkmark icon and a blue 'Cancel' button with an 'X' icon.

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.

The image shows a mobile application interface for adding a service. On the left, a sidebar menu includes 'Record Information', 'Case Conference Details', and 'Identification / Registration'. The main content area has a 'SERV' header and an 'Add Se' button. Two dropdown menus are visible: 'Service provision' and 'Type of Service', with 'Health/Medical Service' selected under the second. A 'Created on' field is partially visible at the bottom.

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:

- **By When** - When you select a due date, Primero sets a reminder in the Tasks List.

Created on

12-Apr-2025 14:59



dd-mmm-yyyy hh:mm

By When?

13-Apr-2025



This field will create a reminder in the Tasks List.

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 (Focal Point 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.

Interprete	Implementing Agency	Salus	X ▼
Intake Ass	Location	(Select...)	▼
Risk Asse	Focal Point Name	pcm-sp	▼
MHPSS			
Case Plan			

+ Add

- **Client informed of referral** - Check whether or not the client has been informed of the referral.
- **Caregiver informed of referral** - Check whether or not the client has been informed of the referral, if applicable.

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 someone not using Primero?** - 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.
- **Implementing Agency** - Agency or organization who will provide the service.

- **Service Location** - Place where the service will be provided.

Is this a referral to someone not using Primero?

☒ Yes

External referral details

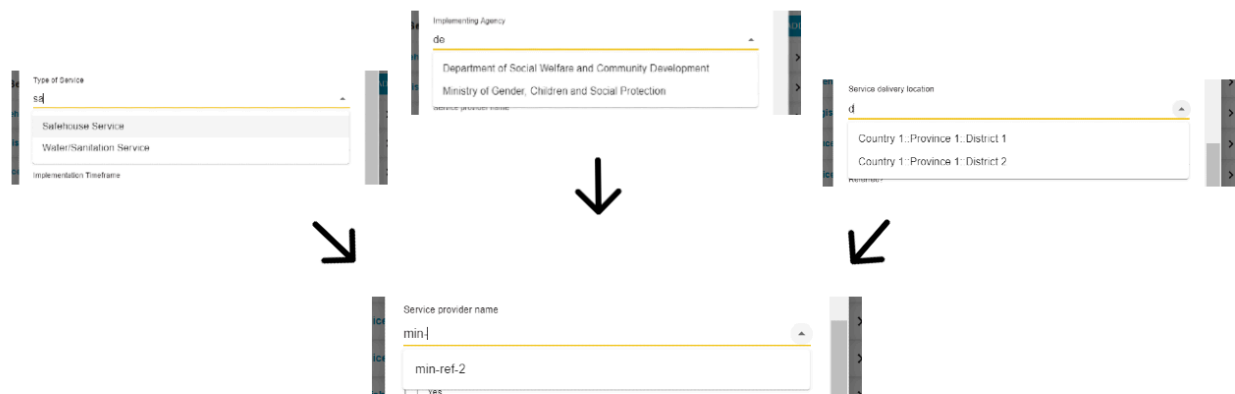
Service Provider

Implementing Agency

Service Location

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

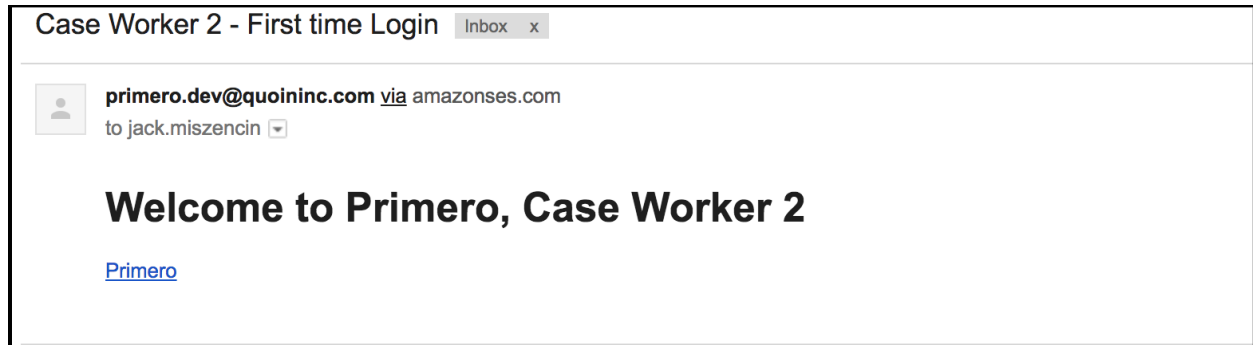
Notification Emails

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:

- Supervisors 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,

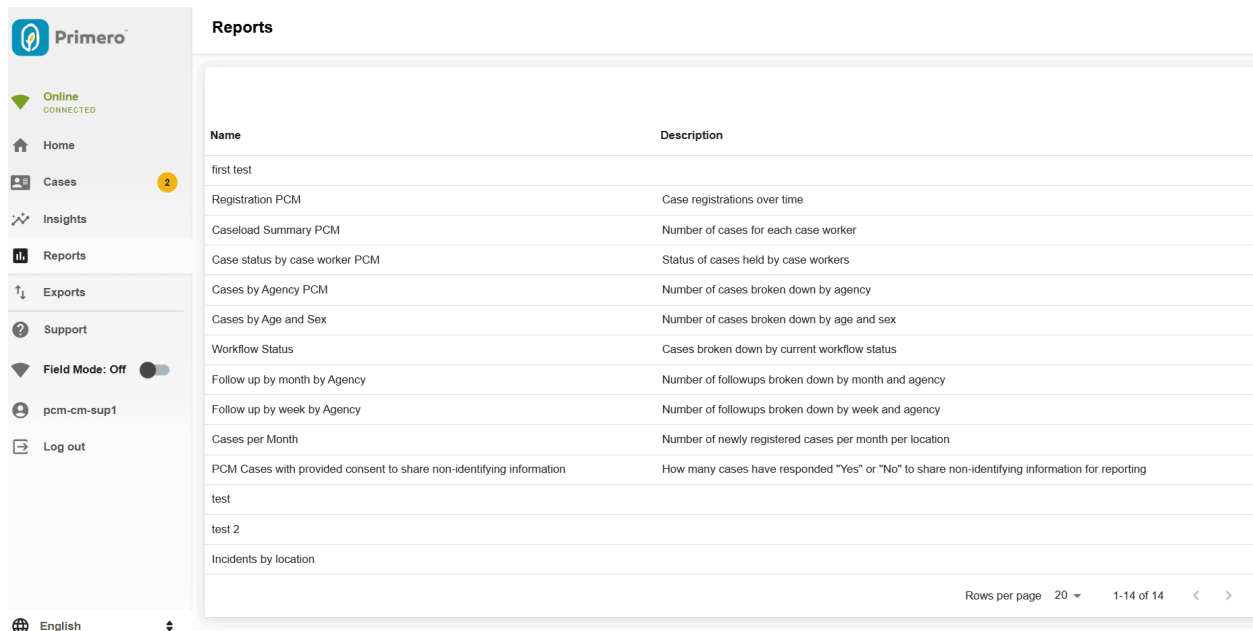
users will only receive welcome emails if the system has been configured to send them, and if the user in question has been set up to receive them.



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

Reports

Reports allow users to see a high-level, aggregate view of data, helping them to understand trends and coming challenges in their work. Supervisors 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 administrators and MEAL staff 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 ProtectionCase Management module, and the Case record type.

Create Report

Name *	Case Record Report
Description	
Modules *	PCM
Record type *	Case

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.

Modules *

PCM

Record type *

Case

Group by row *Displacement Status ×**Group by column ***Sex assigned at birth ×Geographic location intake ×☐ Use age ranges**Use date ranges**

Month

☐ Generate a graph?☐ Do not display empty rows☐ Disabled

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 tick boxes 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

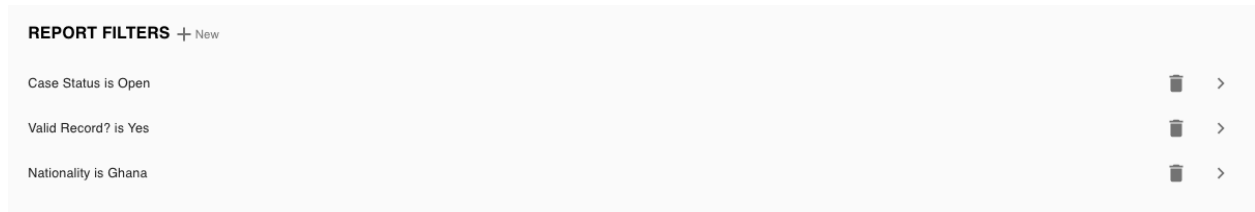
Generate a Graph: Select this tick box to generate a bar graph of your data in addition to a table report.

☒ Generate a graph?

☐ 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.

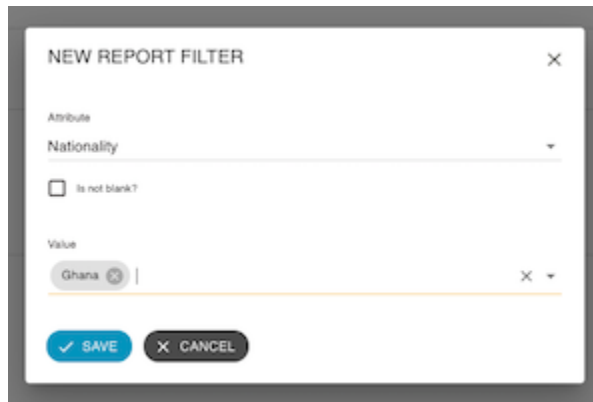


REPORT FILTERS + New

Case Status is Open

Valid Record? is Yes

Nationality is Ghana



NEW REPORT FILTER

Attribute

Nationality

☐ Is not blank?

Value

Ghana

✓ SAVE X CANCEL

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 Assessment” 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 Assessment 

Constraint

After 

Value

01-Jan-2022 

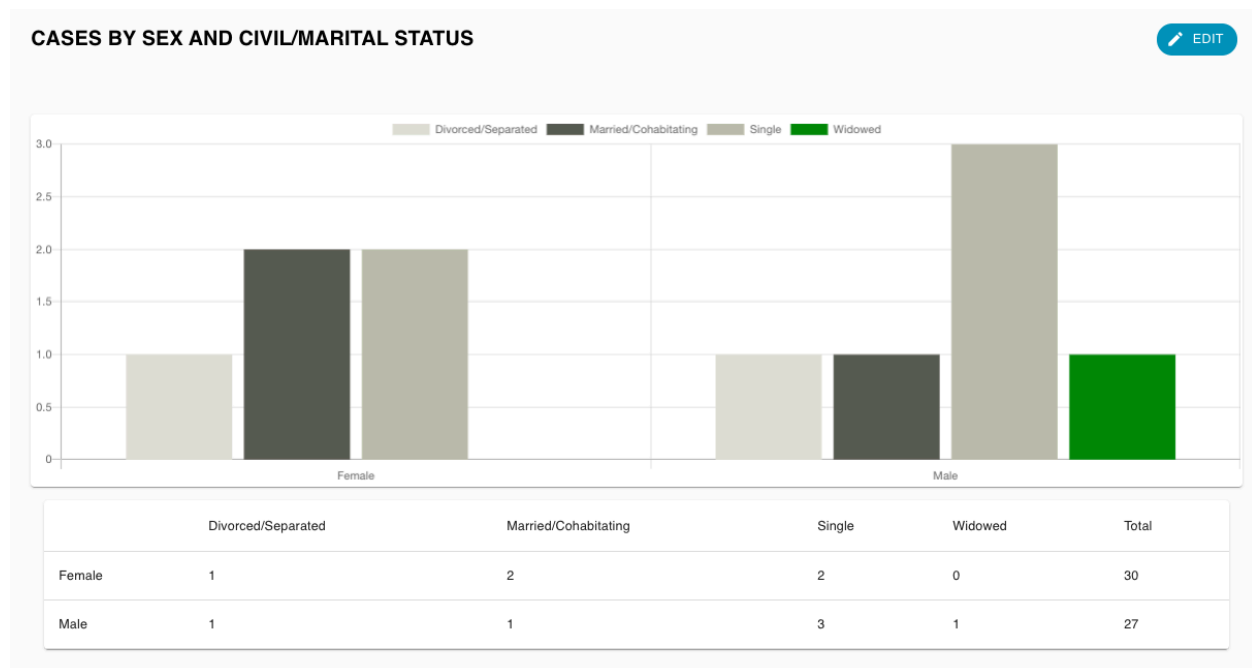
 Save

 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

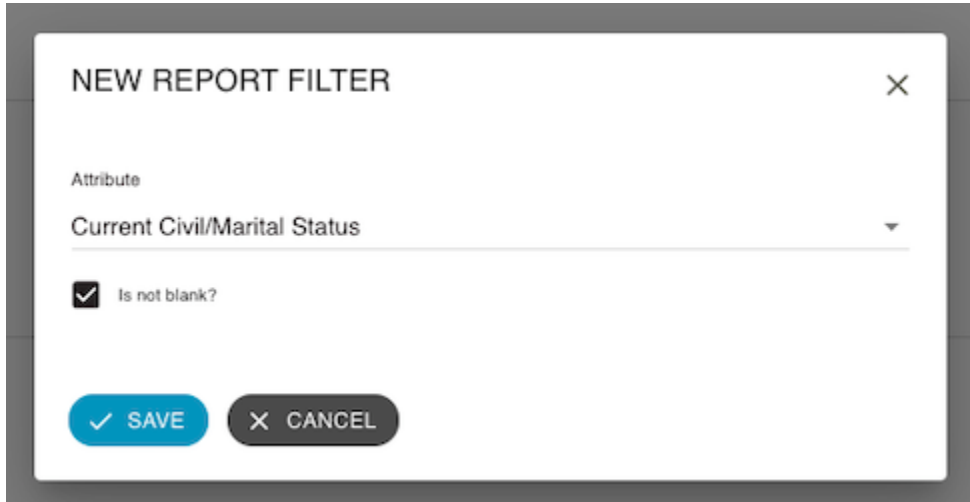
Viewing a Report

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 X 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.

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. This feature is currently enabled for the TSFV instance of Primero where the insights are specific to incidents. PCMIMS+ specific insights are currently under development.

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.

TIME	PERFORMED BY	ACTION	DESCRIPTION	RECORD OWNER
06-Oct-2020 14:29	primero_admin_cp	list	translation missing: en.logger.list Dashboard " by user 'primero_admin_cp'	primero_admin_cp
06-Oct-2020 14:29	primero_admin_cp	bulk_index	translation missing: en.logger.bulk_index Alert " by user 'primero_admin_cp'	primero_admin_cp
06-Oct-2020 14:29	primero_admin_cp	index	Listing Records Lookup " by user 'primero_admin_cp'	primero_admin_cp
06-Oct-2020 14:29	primero_admin_cp	show	Viewing User '2' by user 'primero_admin_cp'	primero_admin_cp

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, the type (and sometimes the ID) of the record on which the action was performed, 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, 2020. 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
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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	

[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.

[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.