Incident Reporting and Case Management Tracking

The GBVIMS module of Primero allows for social workers, case managers and other staff of service providing organizations to collect, store, and analyze data on reported incidents of gender-based violence and to track case management services.

In this module there are two components: one for incident reporting (similar to the existing GBVIMS Incident Recorder database) and a new component for tracking case management outcomes over time.

Case Management Tracking

To create a new case:

1. Click on **Cases** in the header navigation bar.
2. Click on **New Case**.
3. Click **GBV**.
4. Enter information in the forms as below.
5. Once completed, click **Save**.

You will see in the left side navigation panel several forms to be completed:

- *Record Owner*: This is a core form of the system. The information collected here is about the social worker who 'owns' the case in the system. This is the individual responsible for the case. It is recommended to complete the caseworker code and agency. If this section is being completed by data entry staff and not the social worker/case worker responsible for the case, make sure to assign that individual under **Other Assigned Users**. DO NOT REMOVE THIS FORM. It is connected to the core functioning of the system.
- *Consent for Services*: This form documents if the caseworker received verbal confirmation from the survivor for case management services.
- *Survivor Information*: This is a core form of the system. The information collected here includes demographic information about the client such as birth date, sex, nationality, marital status, occupation, displacement status, etc. DO NOT REMOVE THIS FORM (though it may be edited). At a minimum, keep the survivor code on this form, as this is a connection between cases and incidents. Other information on the form can be edited or hidden. Information from this form that is duplicated on the incident form will automatically populate if you create an incident from inside the case.
- *Survivor Assessment*: the information collected here includes the survivor context, presenting problem, immediate need, initial safety planning, etc.
- *Action Plan*: the information collected here includes the safety, health, legal, and psychosocial action plans. You can add as many action plans as needed.
- Included in the **Action Plan** form is a sub-form for *Follow-Ups*. The information collected here should be completed upon follow-up visits with the survivor. It includes the type of services, follow-up date, action taken, next visit, and progress made toward other goals. This section also includes information about ongoing services: referral source, appointment time and date, and service provider. You can add as many follow-up forms as needed.
- *Consent for Referrals*: This is a core form of the system. The information collected here is the same as the existing GBVIMS Consent Form. The form starts by confirming that the survivor consented to receive services. Then the user can select yes or no to acknowledge consent for information sharing for each type of referral service. DO NOT REMOVE THIS FORM. For the services the survivor did not consent to share their information for a referral, the user will not be allowed to refer/transfer the case without overriding consent.

- *Case Closure*: this includes information about the case closure: dates, status, assessment, and the closure checklist.
- *Other Documents*: users can scan and upload other relevant documents here. You can also include a description of the document.
- *Referrals and Transfers*: this form is auto-populated once a referral or transfer modal is completed under the actions bar. It will only appear on the left hand task bar, if this form has been completed.

You will also see the option on all of the form pages under Cases the capability to **Flag** an incident.
To flag an incident:
1. Once you have opened a new incident, click on **Flags**.
2. Enter the **Flag Reason** and if applicable the **Date**.
3. Click **Flags** to complete.

You can remove a flag by clicking in the incident, then unflag and entering a reason for unflagging the case. A history of why cases were flagged or unflagged will appear for record-keeping.

Transfers and Referrals

Transferring is handing over complete care for the survivor to another service provider with the survivor's informed consent. This signals that the case will no longer be handled by the organization that is the source of the transfer. The process to transfer in Primero is one part of the process. For other steps, refer to the local Standard Operating Procedures (SOP).

To transfer a case:
1. Click on **Cases**.
2. Click on **Actions** in the anchored header.
3. Click on **Transfer Case**.

4. The following form will appear and allow you to select options for your transfer. This form will allow you to select the **Existing User**, which is a user within your version of Primero/GBVIMS+. If the desired user to transfer to is not in the drop down, it means this user does not have privileges to be transferred to.

5. To transfer to a user outside of your primero instance, select the checkbox at the bottom of the form, to create a transfer export file (.JSON or "Primero" format) that is password protected to be shared outside the system.

If you are accepting a Primero transfer file from another GBVIMS+ user, click on **Import** to upload the form.

Referrals

Referring is contacting another service provider to help meet the survivors needs with the informed consent of the survivor; when caseworkers share information with other service providers who can help the survivor meet their specific needs. For referrals outside of Primero or to non-Primero users, you will need to determine the appropriate steps according to the local SOP.
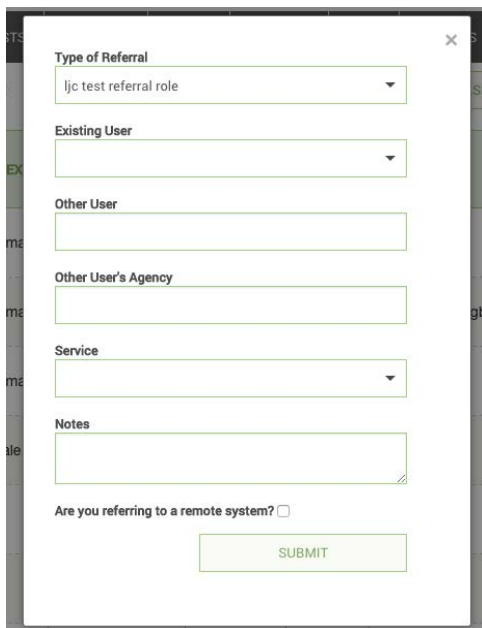
To refer a case:
1. Click on **Cases**.
2. Click on **Actions** in the anchored header.
3. Click on **Refer Case**.

4. The following form will appear and allow you to select options for your transfer. This form will allow you to select the **Existing User**, which is a user within your version of Primero/GBVIMS+. If

the desired user to refer to is not in the drop down, it means this user does not have privileges to be referred to.

5. To refer to a user outside of your primero instance, you select the checkbox at the bottom of the form, to create a refer export that is password protected to be shared outside the system.

If you are accepting a Primero referral file from another GBVIMS+ user, click on **Import** to upload the form.

Creating an Incident from a New Case

Once a case is created, you can then create an incident that is linked to that case. In the Anchored Header, there is a **Create Incident** button that is available to click once you have saved the case.

Click on this button, and you will be redirected to the incident forms to create a linked incident. Once in the incident, you can navigate to the proper forms to enter information about the survivor, incident, perpetrator, and service referrals etc. The benefit of creating an incident from the case is that the survivor code with be automatically populated from the case to the incident. This is the only connection between the case and the incident.

Incident Reporting

To create a new incident:
1. Click on **Incidents** in the header navigation bar.
2. Click on **New Incident**.
3. Click **GBV**.
4. Enter information in the forms as below. The data points on these forms match the data points in the existing GBVIMS intake form.

5. Once completed, click **Save**.

You will see in the left side navigation panel several forms to be completed:

- ***Record Owner***: the information collected here is about the social worker who 'owns' the case in the system. This is the individual responsible for the case. It is recommended to complete the caseworker code and agency. If this section is being completed by data entry staff and not the social worker/case worker responsible for the case, make sure to assign that individual under **Other Assigned Users**.
- ***GBV Incident***: the information collected here includes the relevant dates, account of the incident, displacement status and stage, and incident location. This information mirrors data points collected in the existing GBVIMS intake form.
- ***Type of Violence***: the information collected here includes the type of violence, harmful traditional practice, type of abduction, other reports and previous experience with GBV. This section as well mirror data points collected in the existing GBVIMS intake form.
- ***GBV Individual Details***: the information collected here includes the survivor code, sex of the survivor, date of birth, country of origin, marital status, disability type, among other data points, which mirror the existing GBVIMS intake form.
- ***Alleged Perpetrator***: this section collects information about the alleged perpetrator(s), including the sex, age group, relationship, and occupation among other data points. While the data points here as well mirror the existing GBVIMS intake form, there is the option to add information about multiple perpetrators.
- ***Service Referrals***: the information collected here is about the source of the referral, and referral pathway details for safe house, health/medical, psychosocial, legal assistance, livelihoods, and protection/security. After inputting information on the safe house referral, click the second **Add** button at the bottom to move onto the next service referral.

You will also see the option on all of the form pages under Incident the capability to **Flag** an incident. To flag an incident:

1. Once you have opened a new incident, click on **Flags**.
2. Enter the **Flag Reason** and if applicable the **Date**.
3. Click **Flags** to complete.

You can remove a flag by clicking in the incident, then unflag and entering a reason for unflagging the incident. A history of why incidents were flagged or unflagged will appear for record-keeping.

Paper Documentation

Many users of GBVIMS+, especially those new to the system will want to keep a paper copy as a back-up. If you need to print a copy of what you have entered into GBVIMS+ for your case file, you can export and print the Case PDF.

To do this, under the Case section:

1. Click **Actions**.
2. Click **Export Case PDF**.
3. Open the folder and print and file the document.