iCasework

User Guide for Investigating Officers of Member's or Mayor's Enquiries (ME)

Version 1 (issued 12th August 2015)

Contents

Receiving a new request

1. When a new ME is received, it is logged on iCasework centrally and assigned to Investigating Officers (IO) within services. The system generates an email with an embedded link notifying the IO that a new ME has been assigned to them. A sample of a notification email can be found below.
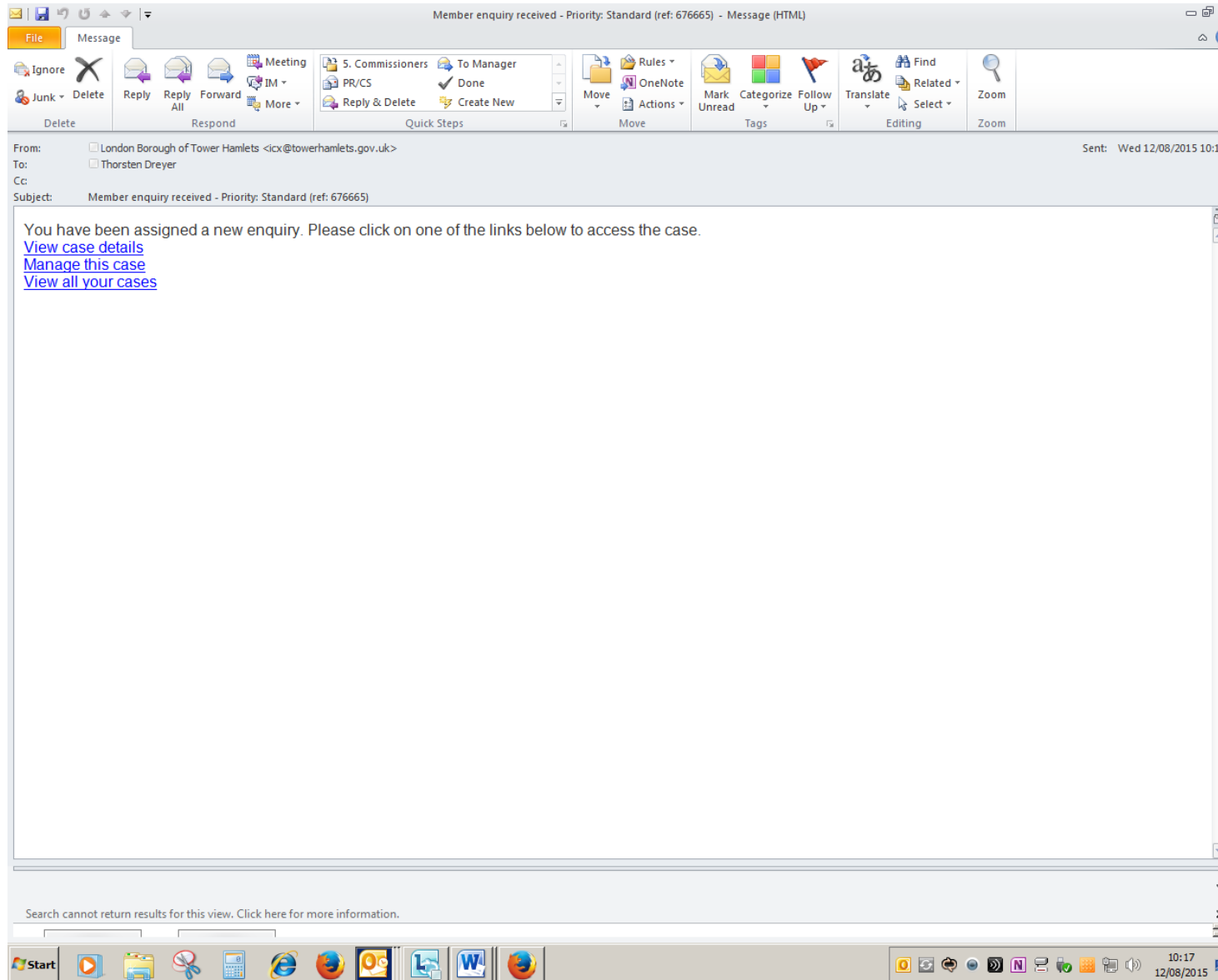
2. In order to access the ME and process it, please click on "Manage this case" in the email. The link will open the log-in screen of the iCasework system.

3. User names are in the same format as LBTH email addresses (excluding the @towerhamlets.gov.uk). All LBTH staff have been set up as basic users. In order to set a password for yourself, click on the password reset link below the log-in fields.

Accessing a new ME

4. After log in, a screen similar to the one below will appear. This screen shows the last tasks someone has completed on the case. The tasks you see will have been performed by central support teams.

5. Click on "Open the case and do not show these details again" to proceed to the case details. You may need to do this more than once depending on how many previous actions the system has recorded. The following screen appears:

6. At this point you have three options to progress the case:

    a. If you are in a position to answer the question/request yourself, please go directly to "Drafting the response" below.
    b. If you need comments from someone else in order to answer the request, please see below for "Getting comments from someone else". This means you continue to be the IO.
    c. If you want to assign the case to someone else so they are the IO, please see below for "Re-assigning a case".

Getting comments from someone else

7. In order to obtain comments from someone else, you must use the "Get comments" functionality built into the system. You must not email requests for comments outside the system. Using the system allows you to track requests and will automatically remind people of requests or outstanding tasks you have sent to them.

8. Click on "Get comments" in the bottom left hand corner of the screen. The following screen appears:
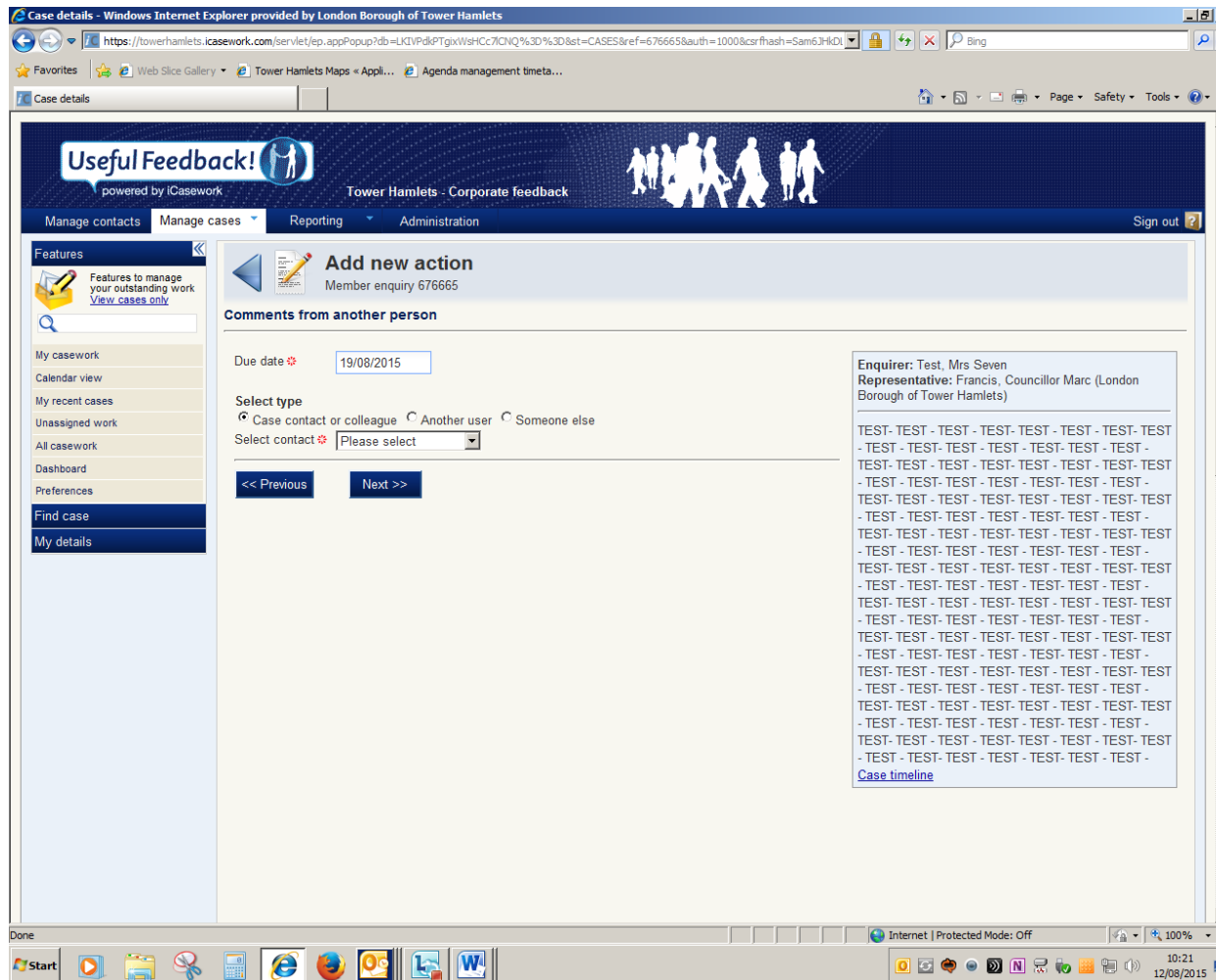
9. You now have three options to get comments from others. You will need to select the relevant option. You can ask the following people for information:

   a. Case contact or colleague – This is someone who already has access to the same cases as you. If you select this option, you can select the contact or colleague from a drop down menu.
   b. Another user – This is someone who is an iCasework user but not assigned to the case. All LBTH staff have been set up as basic users.
   c. Someone else – This is someone who is not a user of the system. This could be someone in a partner organisation from whom you need input into your response.

In most cases you would select "Another user" as you need information from one of your members of staff or a colleague in your service or another service. This functionality is particularly important for requests which require information from various services or Directorates.

10. The screen allows you to set a target date for receiving the comments. A date is automatically inserted but you can override the default date to obtain responses sooner.

11. If you select "Another user", type the first few letters of their surname into the "Enter name" field. The system will then give you a choice of names from the email Directory. Select the colleague you wish to contact, then click "Next".

12. The following screen allows you to edit an email to the person so that you can specify what you require. The email automatically includes the full FOI but you may want to specify that you only need your colleague to provide specific information or answer one question of a set of questions. Once you have edited the message, click "Send message now".
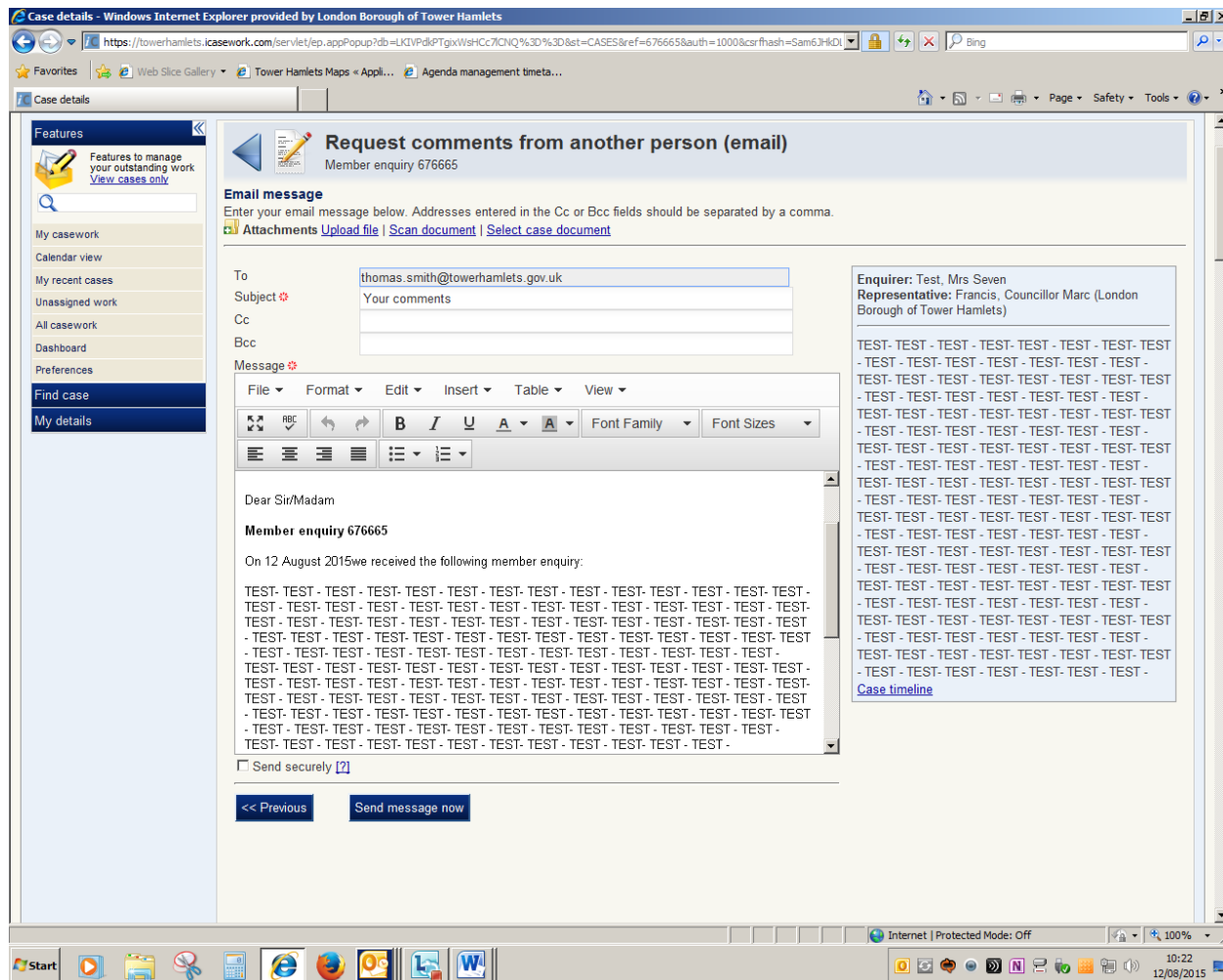
13. Once the email has been sent, the task for your colleague is shown at the bottom of the screen in the task list.

14. The system will notify you when your colleague has responded. However, you should regularly check the system for any new tasks/updates. A sample email notification is shown below.
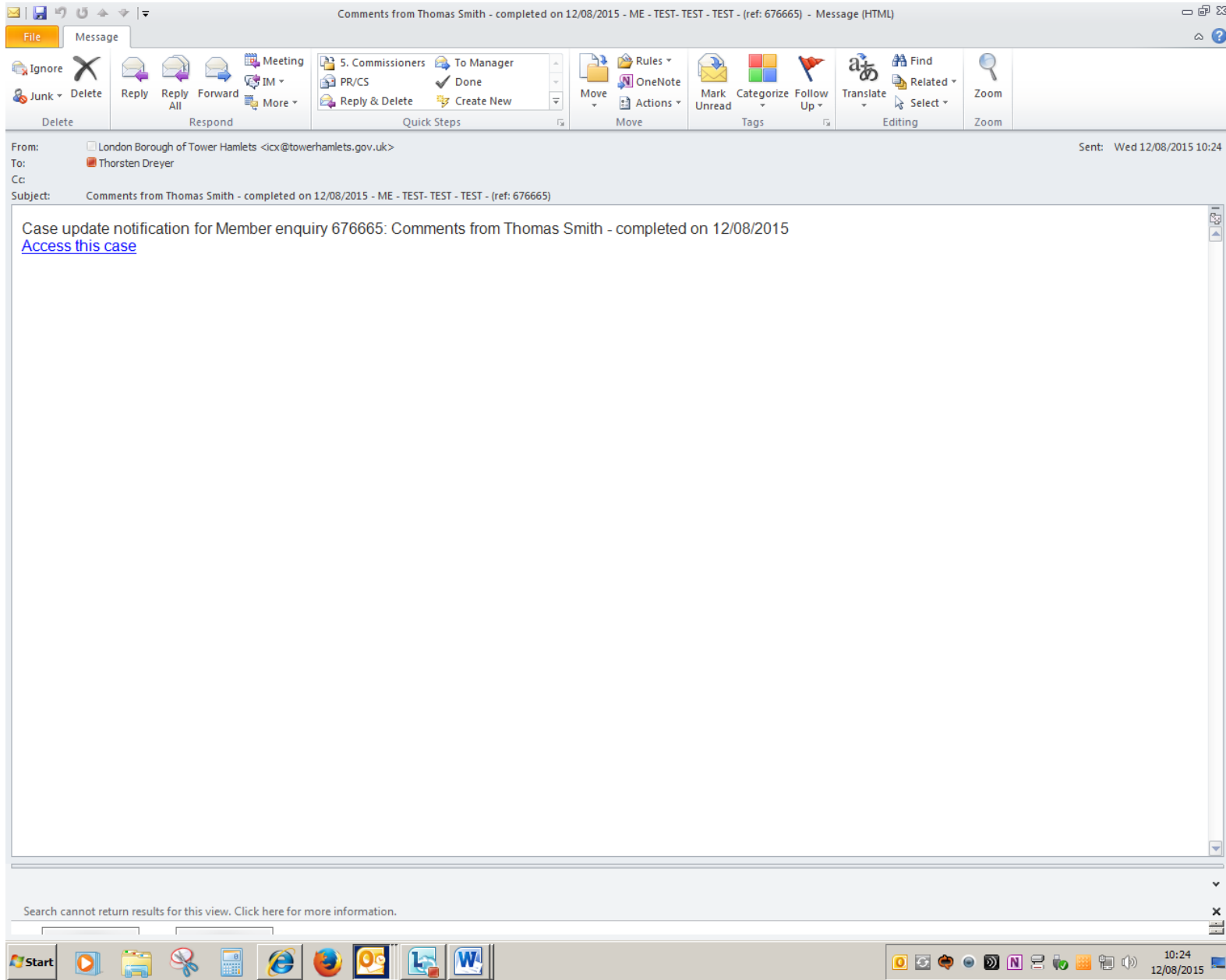
15. To access the comments, click on the "Comments from …" link in the What's Done section of the case screen.

16. While you are awaiting the comments, you can start to draft the response within the system with any information that you hold yourself.
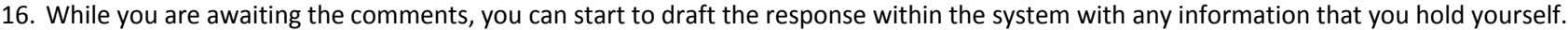
Re-assigning the case to someone

17. The system allows you to assign the entire case to someone else. Doing so means they become the investigating officer and all tasks the system generates as part of its workflow will default to them. It also means that notifications of tasks allocated to others (such as requests for comments) will be sent to them. You may, for example, want to assign the entire case to someone else if you are a service manager who would normally ask others to write a response which you sign off/approve.

18. In order to re-assign a case, go to the Status section of the case screen in the top right hand corner. In this section look for the "Assigned to" field. In the example below, the case is "Assigned to Thorsten Dreyer".

19. Click on "Re-assign" next to the name.

https://towerhamlets.icasework.com/servlet/ep.appPopup?db=LKIVPdkPTgixWsHCc7lCNQ%3D%3D&st=CASES&ref=676665&auth=1000&csrfhash=Sam6JHkDl

Bing

Favorites | Web Slice Gallery ▼ | Tower Hamlets Maps « Appli... | Agenda management timeta...

Case details

Home ▼ | Page ▼ | Safety ▼ | Tools ▼ | ?

Useful Feedback!
powered by iCasework

Tower Hamlets - Corporate feedback

Manage contacts | **Manage cases** | Reporting | Administration | Sign out ?

Features

Features to manage your outstanding work
View cases only

My casework
Calendar view
My recent cases
Unassigned work
All casework
Dashboard
Preferences

Find case

My details

ME - TEST- TEST - TEST - 676665
Francis, Councillor Marc (London Borough of Tower Hamlets) - Mulberry Place, , 5 Clove Crescent, London, E14 2BG
On behalf of: Test, Mrs Seven (152614) - Flat 1 , Blenheim Place , 114 Stepney Way, London, E1 3BG

Status | Contacts | Response | Documents | Timeline | Audit trail

Details

Received 16 minutes ago on 12/08/2015
Form details | Case details | Edit details
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Linked cases Link to case | Find case

What's next

Correspondence Add | Contact colleague

Due	Type	Recipient	Assigned to
26/08/2015	Enquiry response	Francis, Councillor Marc (London Borough of Tower Hamlets) Prefers email	Thorsten Dreyer Edit ✕

Tasks To do | Get comments | Contact customer | All actions

Due	Task	Assigned to
26/08/2015	Track member enquiry	Councillor support Action now	Assign

Status

Awaiting response Update status
Initial assessment
Withdraw case
Due 14 days from now on 26/08/2015 Edit
Priority Standard Edit
Team CLC Strategy & Resources Re-assign
Assigned to Thorsten Dreyer Re-assign
Enter general notes here
Re-assign this case

What's done Add note

Date	Details
12/08/2015 10:23	Comments from Thomas Smith 📅 ↩
12/08/2015 10:23	Request comments from another person (email) thomas.smith@towerhamlets.gov.uk ↩
12/08/2015 10:13	Classify enquiry 📅 ↩
12/08/2015 10:08	Initial assessment
12/08/2015 10:08	Member enquiry

Start | 10:25 12/08/2015

20. The following screen appears. You can now select another member of the team dedicated to dealing with the type of ME you are handling. Each ME category has a different set of team members. The members of these teams were agreed with Heads of Service before the system went live. They are generally service managers, team leaders and the key individuals who deal with complaints, FOIs and members' enquiries.

21. In the example below, the case has now been re-assigned to Thomas Smith. You will notice that the correspondence is now also allocated to him by default. Once you have assigned a case to someone else, they will receive a notification email as shown at Step 1 above.

Drafting the response

22. On the main case screen under the "What's next" section, click on "Edit" next to "Enquiry response" to commence drafting the response.

23. A pop up window appears. Click on "Edit letter".

24. The system will open a template response in Word. You will need to click "Enable content" in Word above the document. Draft your response as you would edit any Word document. Once completed, save the document. The document will be saved to the iCasework system automatically. You must not save the document anywhere else as you will not be able to retrieve it from within the system or escalate it for approval. You will always be able to view the document within the system later, if you wish. Saving only within the system ensures version control and creates a clear audit trail. Once you have clicked save, you will need to wait for a further pop up window which confirms that the document has been saved. Do not close Word before this appears. Close the Word document once the confirmation pop up has appeared.
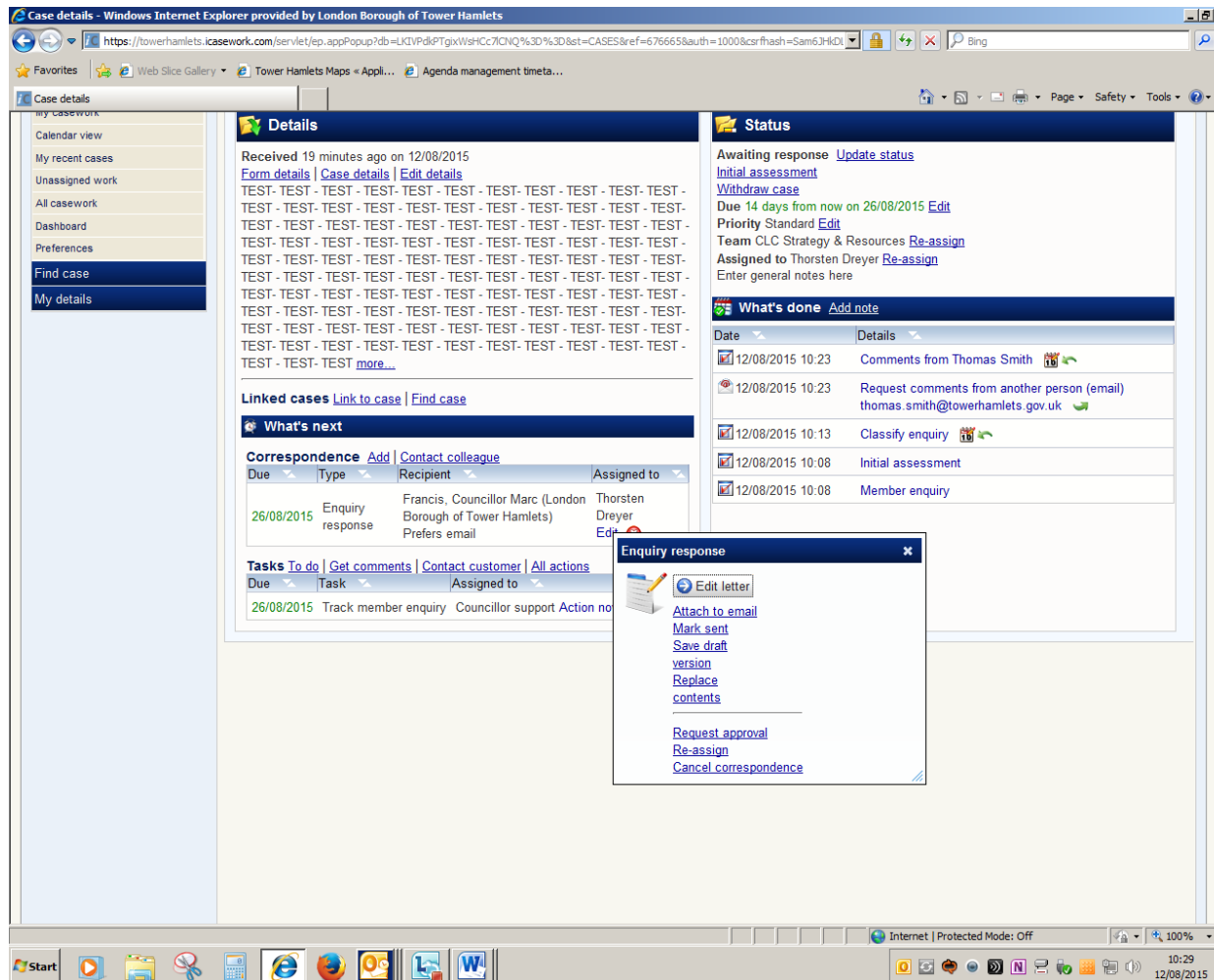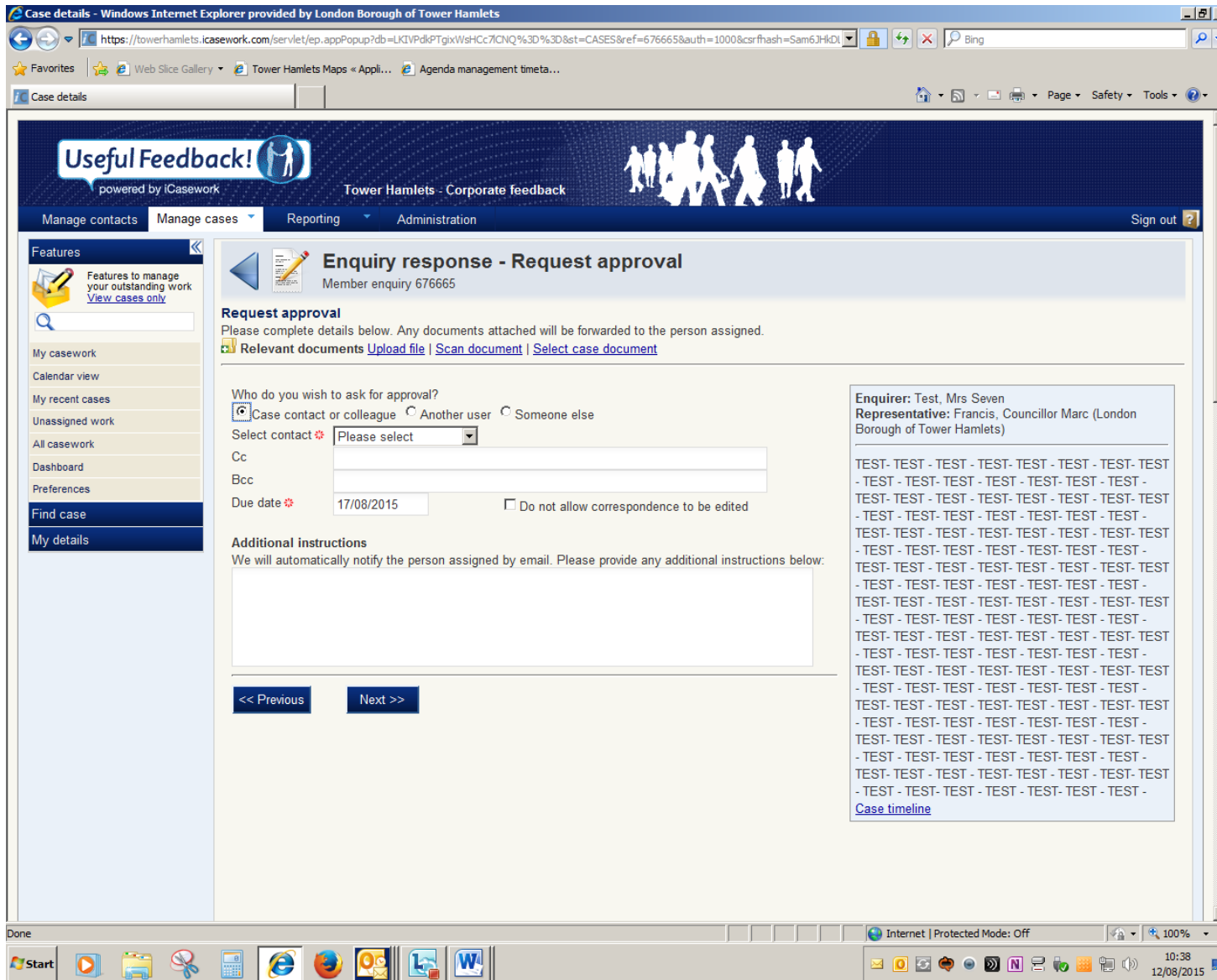
Requesting approval

25. After you have saved the response in Word and closed Word, the system reverts to the following screen. Depending on your local service requirements, you may need to get approval for your ME response from various people. The system allows you to do so by going around the approval process several times. You must only seek approval in sequence and await approval at a lower tier before sending to the next tier if required.

26. In the pop up window click on "Save draft version". The system will ask whether you want to save. Click "Yes".
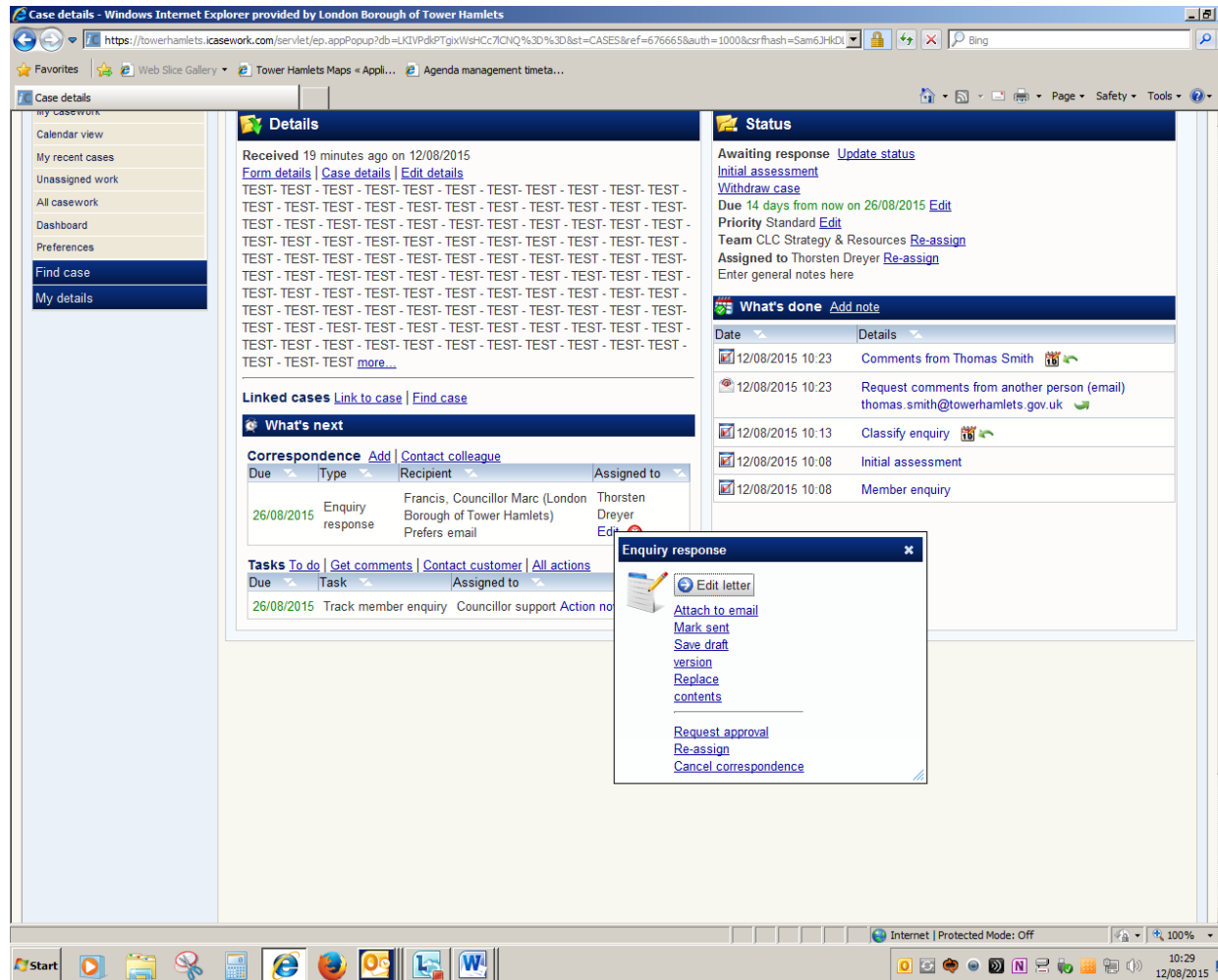
27. The system will revert to the following screen. Click on "Edit" next to "Enquiry response". The pop up window re-appears. This time click on "Request approval" in the pop up window.

28. After clicking "Request approval" the following screen appears:

29. Select "Another user" and search for the approver you want to send the request to as outlined above in the section on *Getting comments from someone else*. Click next to generate an approval request to the approver you have selected.

30. If you need to attach further documents to accompany the covering response, click on "Upload file" and follow the instructions to upload a document from your usual drive. You are able to give the document a name under which it will appear in the iCasework system. You may want to consider a descriptive name such as *Appendix 1 to ME ref*.

31. The system now generates an email with a link to the approver. The approver will go into the system to review, edit as necessary and approve or reject your draft. If they make changes, this version becomes the latest in the Correspondence section. Previous versions will be retained in the "What's done" case history on the right hand side of the main case screen.

32. Once the approver has either approved or rejected, you will be notified by email.

   If you need to edit the document following rejection, repeat the steps above.

Completing your part of the process

33. Once you have received approval (if required) you will need to re-assign the case to the central CLC support services team who will deal with the remainder of the process.

34. On the main case screen (see below) click on "Re-assign" in the status box in the top right hand corner next to your name. Select "Leave unassigned" from the drop down menu in the pop up that appears and click "Next". This completes what you need to do.