iCasework

User Guide for Approvers of Member's and Mayor's Enquiries (ME)
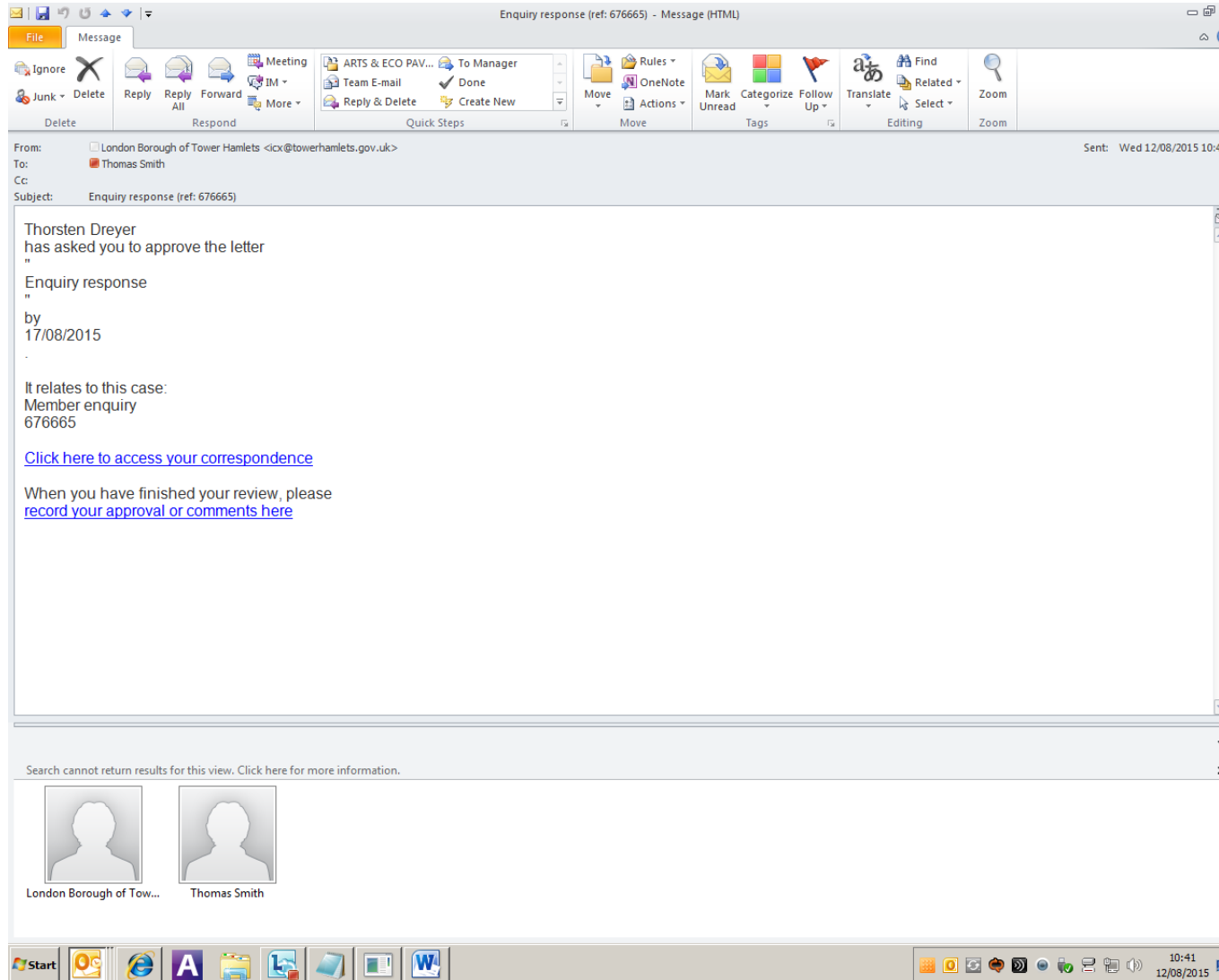
Version 1 (issued 12th August 2015)

Contents

Receiving an ME response for approval

1. All MEs are managed and work-flowed through the iCasework case handling system. This includes the approval of ME responses at the required level of management. You will be notified by email when an ME response is awaiting your approval. A sample email can be seen below.

2. Click on "Click here to access your correspondence" in order to review the ME response. 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 the case history

4. Responses may require sign off at various levels of management. If you are a higher tier approver you may wish to reassure yourself that a response has had the required lower tier sign off before you review the response. You can do this by accessing the case history. See step 6 for a screenshot. Instead of clicking on "Edit letter" at step 6, click on "Access case". This will open the main case screen. The right hand pane of the main case screen shows an audit trail of previous actions in relation to the case, including any prior approvals.

Reviewing the draft response

5. Following log-in you will be presented with the following screen. The list of correspondence will show all the correspondence awaiting your action. If you have more than one item to review, these will also be shown in the list and you can deal with them in turn. Click on the item you wish to review.
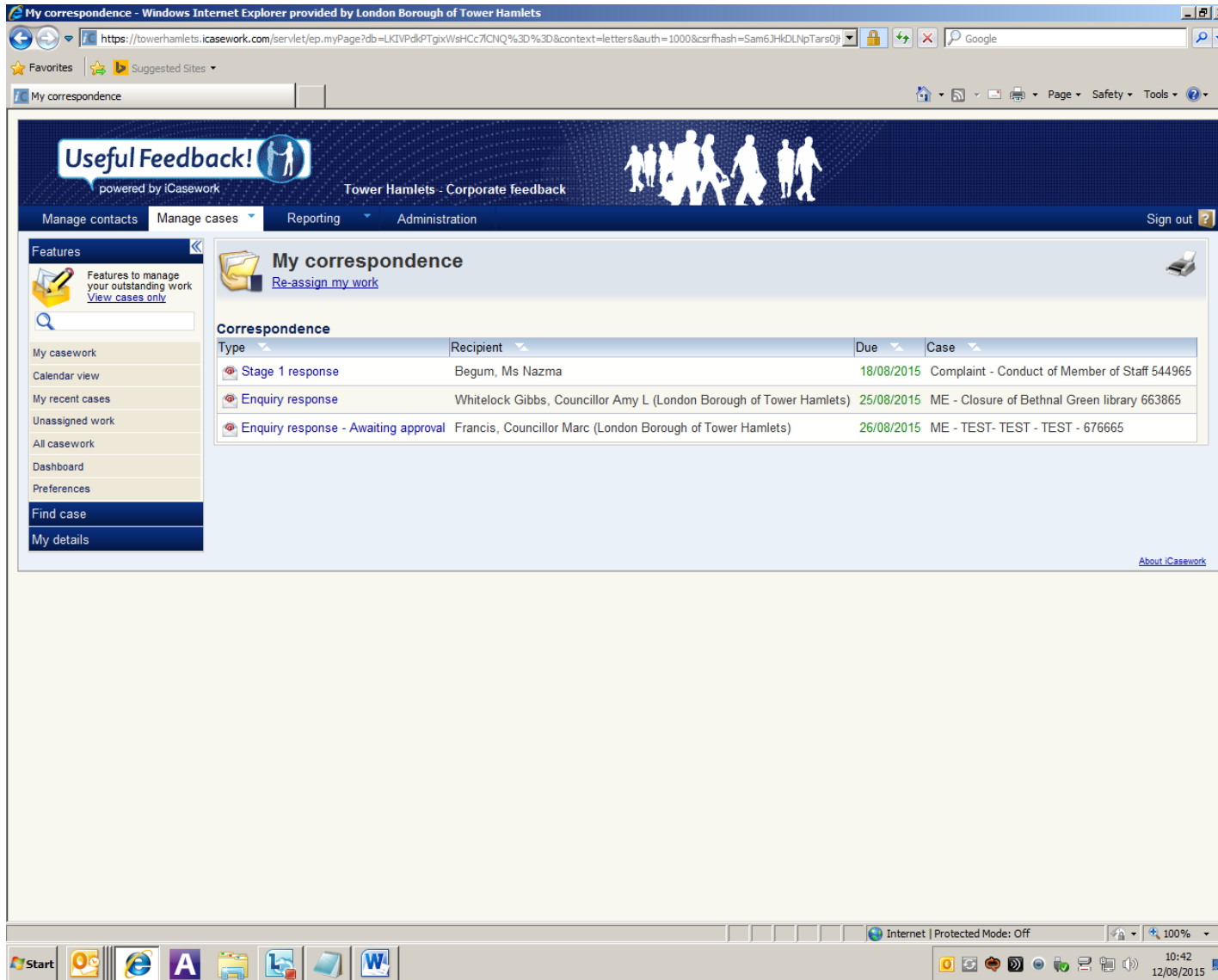
6. A pop up window opens up as shown in the image below. Click on "Edit letter" to review the draft response referred to you for approval. The system will open the draft response in Word. In order to edit the Word document, you will need to enable content/editing (at the top of the Word screen). You can make comments and track changes within the document as you can with any Word document.

https://towerhamlets.icasework.com/servlet/ep.myPage?db=LKIVPdkPTgixWsHCc7lCNQ%3D%3D&context=letters&auth=1000&csrfhash=Sam6JHkDLNpTars0jl

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My correspondence

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Sign out ❔

Features

Features to manage your outstanding work
View cases only

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Calendar view
My recent cases
Unassigned work
All casework
Dashboard
Preferences

Find case

My details

My correspondence
Re-assign my work

Correspondence

Type	Recipient	Due	Case
Stage 1 response	Begum, Ms Nazma	18/08/2015	Complaint - Conduct of Member of Staff 544965
Enquiry response	Whitelock Gibbs, Councillor Amy L (London Borough of Tower Hamlets)	25/08/2015	ME - Closure of Bethnal Green library 663865
Enquiry response		6/08/2015	ME - TEST- TEST - TEST - 676665

Enquiry response - Awaiting approval ✖

Enquiry response - Awaiting approval
Due: 26/08/2015
Francis, Councillor Marc (London Borough of Tower Hamlets)
Prefers email

⬅ Edit letter   ⬅ Record approval

Attach to email
Mark sent   Cancel correspondence
Save draft
version
Replace
contents

About iCasework

ME - TEST- TEST - TEST - 676665
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⬅ Access case   Print case details Email caseworker Add case note

Done   Internet | Protected Mode: Off   100% ▾

Start   10:43 12/08/2015

7. Once you have completed your review of the Word document, save the document as you would normally in Word. <u>Do not</u> select a location for the document to be saved to. Simply saving will save the document within the iCasework system where the investigating officer will be able to pick it up. Prior to exiting Word you will need to wait for a pop up window confirming that the document has been saved successfully. Once the confirmation has appeared, close the document.

8. Do not save the document anywhere else. It is saved within the system where you can review it at any time. Using the system will ensure version control and retain a clear audit trail for approval. Previous versions of the document (e.g. the version sent to you for approval) are automatically retained within the system.

Recording approval

9. The system will take you back to the list of correspondence for review. Click on the item you are reviewing and the pop up window will open again. This time click on "Record approval".

https://towerhamlets.icasework.com/servlet/ep.myPage?db=LKIVPdkPTgixWsHCc7lCNQ%3D%3D&context=letters&auth=1000&csrfhash=Sam6JHkDLNpTars0ji

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- Unassigned work
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- Preferences

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Access case   Print case details   Email caseworker   Add case note

About iCasework

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Start   10:44   12/08/2015

10. The next screen allows you to approve or reject the correspondence. You can also insert any comments/reason if you wish. Select either "Yes" or "No", enter comments if you wish, then click "Next".

11. The investigating officer will receive a notification of your decision and will (if you have made any amendments to the Word document) receive an updated version of the response for processing. If you have rejected the response, the investigating officer will need to make any amendments and resubmit the response for approval as above.

12. Once you have completed your approval/rejection you can sign out of iCasework if you want.