

**The LS/CMI system**

**Guide for First Line Managers/  
Team Leaders**

This guide relates to Version 5.1 of the LS/CMI system.

April 2018

## Version Control

Version	Description	Date	Produced by
0.1	First draft	15/09/16	Ian McIntosh
0.2	Additional override and import guidance included following review by Julie McDonald	20/09/16	Ian McIntosh
1.0	1 <sup>st</sup> published version	10/10/16	Ian McIntosh
2.0	Updated for release of V4 of system	07/04/17	Ian McIntosh
3.0	Updated for release of V5.1 of the system	19/04/18	Ian McIntosh

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## Introduction

This guide illustrates key tasks that Criminal Justice Social Work first line managers are likely to undertake whilst using the LS/CMI system.

First line managers will typically be assigned to the **Team Leader User Group** within the system. Anybody assigned to that user group would usually have access rights which would allow them to:

- Assign and reassign open cases
- Approve overrides and case closure requests
- Import and export LS/CMI files
- Have limited administration rights
- Produce system reports

However, access to the system can be tailored by services, if required, by creating a new user group and assigning some staff to that new group.

Therefore, first line managers in some areas might be able to do more (or less) than the tasks set out within this guide – depending upon local decisions about the role and responsibilities of team leaders.

## Assigning & reassigning cases

Show Exports

Select Case:

Assign to User:

Offender Import

[Import Offender](#)

Export:

1. On Dashboard, use the *Select Case* and *Assign to User* drop down lists

4 S400000/004 LSC (8.2 inc) Dunbarton

Show Exports

Select Case:

Assign to User:

Offender Export

Offenders with only closed cases...

Select Destination

2. Use *Select Case* drop down list to find the required case (cases will be listed alphabetically by surname).

3. Once the required case has been selected, the worker currently assigned to the case will be displayed within the *Assign to User* field

4 S400000/004 LSCMI Full Case, No Disposal (8.2 inc)

Show Exports

Select Case:

Assign to User:

4. Use *Assign to User* drop down list to find and select the required assessor/ case manager

49 S676767/09U Historic, Institutional with Reassignment

47 S676776/08T Historic Reassignment

46 S767676/09U Historic IA N

1

Show Exports

Select Case:

Assign to User:

Offender Import

[Import Offender](#)

	Case	Urn	Offender Name	Stage	Case	Urn																					
<a href="#">Continue</a>	24	S123123/88K	James, Jamie	Offender History	26	S000019/73																					
<a href="#">Continue</a> <a href="#">Reassess</a>	10	S000006/01\$	Shaw, Keith	Case Mgt. 9 to 11	25	S400000/00																					
<a href="#">Continue</a> <a href="#">Reassess</a>	9	S666666/002	ImpExp, Institutional	Case Mgt. 9 to 11	24	S123123/88																					
<table border="1"> <thead> <tr> <th colspan="7">Monthly Tasks</th> </tr> <tr> <th></th> <th>Action By Date</th> <th>Case</th> <th>Urn</th> <th>Offender Name</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td><a href="#">Inspect</a></td> <td>01/07/2015</td> <td>10</td> <td>S000006/01\$</td> <td>Shaw, Keith</td> <td>9.6 - Data Schedule Review Pending</td> <td>10</td> </tr> </tbody> </table>							Monthly Tasks								Action By Date	Case	Urn	Offender Name			<a href="#">Inspect</a>	01/07/2015	10	S000006/01\$	Shaw, Keith	9.6 - Data Schedule Review Pending	10
Monthly Tasks																											
	Action By Date	Case	Urn	Offender Name																							
<a href="#">Inspect</a>	01/07/2015	10	S000006/01\$	Shaw, Keith	9.6 - Data Schedule Review Pending	10																					

5. Message box will appear to advise case has been reassigned.

**Message from webpage** [X]

 The following case:  
Case ID: 24  
Offender: Jamie James  
has been assigned to: Ian McIntosh

6. Click on OK to complete the action

## Approvals

There are 3 occasions where managerial approval is required:

- **Override** (the assessor has decided to apply an override within a full LS/CMI 1-8 assessment);
- **Case to be closed: no management plan needed** (the assessor has completed a full LS/CMI 1-8, decided a management plan is not required and requires the case to be closed);
- **Case to be closed: full case with management plan** (the case manager requires the case to be closed because the service is no longer responsible for assessing/supervising the individual).

Cases which need managerial approval appear within the *Approvals* table on the Dashboard

Case	Assigned To	Urn	Offender Name	Stage	
5	Ian McIntosh	S666333/33K	Mister, Spock	LS/CMI 1-8: Risk Level Override Selected	<a href="#">Inspect</a>
53	Ian McIntosh	S000123/12D	Engineer, Scotty	LS/CMI 1-8: Case Closed, No Case Management Required	<a href="#">Inspect</a>
79	Ian McIntosh	S000678/56T	Kirk, Jimmy	LS/CMI 9-11: Case Closed, Case Management Completed	<a href="#">Inspect</a>

The type of approval being requested

Worker who is responsible for the case

10

## Approval type 1: Override

Approvals

Case	Assigned To	Urn	Offender Name	Stage	
5	Ian McIntosh	S666333/33K	Mister, Spock	LS/CMI 1-8: Risk Level Override Selected	<a href="#">Inspect</a>
53	Ian McIntosh	S000123/12D	Engineer, Scotty	LS/CMI 1-8: Case Closed, No Case Management Required	<a href="#">Inspect</a>
79	Ian McIntosh	S000678/56T	Kirk, Jimmy	LS/CMI 9-11: Case Closed, Case Management Completed	<a href="#">Inspect</a>

10

1. Click *Inspect* to go into the record

2. Use *Previous* to go back to Section 6.3 (Administrative override) and Section 6.2 (Client-based/ clinical override) to view the assessors rationale for applying an override

Jump to Page: -----Please Select-----

Lish Lash(S765341/88Y)

[Lscmi Section6to8](#)

[Previous](#) [Next](#)

### 6.4 Final LS/CMI Risk/Need Level

LS/CMI Section 1 Score: 18

Risk/Need Level	Very Low	Low	Medium	High	Very High
Section 1 Score	0-4	5-10	11-19	20-29	30-43

After considering any need for a client-based or administrative override, select the appropriate risk/need level

Final Risk/Need Level

Very Low
  Low
  Medium
  High
  Very High

[Not Approve](#) [Approve](#)

This is the original Risk/ Need level

This is the Risk/ Need level the assessor wants to override to



Jump to Page: -----Please Select----- Lish Lash(S765341/88Y,

**Lscmi Section6to8**

[Previous](#) [Next](#)

### 6.2 Client Based/Clinical Override

**LS/CMI Section 1 Score:**

Risk/Need Level	Very Low	Low	Medium	High	Very High
Section 1 Score	0-4	5-10	11-19	20-29	30-43

Use the client based/clinical override?

No  Yes

Lower security/supervision levels  
 Increase security/supervision levels

List the reasons for increasing the security/supervision levels. Refer to Sections 2 through 4

Stated intent to break the rules, no matter what, and stated intent to hurt named others warrants a higher level of intervention and monitoring than the score driven risk/need level suggests.

3. Consider the assessors rationale for applying an override

4. Return to Section 6.4

Jump to Page: -----Please Select----- Lish Lash(S765341/88

**Lscmi Section6to8**

[Previous](#) [Next](#)

### 6.2 Client Based/Clinical Override

**LS/CMI Section 1 Score:**

Risk/Need Level	Very Low	Low	Medium	High	Very High
Section 1 Score	0-4	5-10	11-19	20-29	30-43

Use the client based/clinical override?

No  Yes

Lower security/supervision levels  
 Increase security/supervision levels

List the reasons for increasing the security/supervision levels. Refer to Sections 2 through 4

Stated intent to break the rules, no matter what, and stated intent to hurt named others warrants a higher level of intervention and monitoring than the score driven risk/need level suggests.

**Level of Service / Case Management Inventory - LS/CMI Sections 6 to 8**

Dashboard   New Case   Offender History   LSCMI 1-8   Risk/Needs Summary

Jump to Page: -----Please Select-----   Lish Lash(S765341/88Y,

[Lscmi Section6to8](#)

[Previous](#)   **6.4 Final LS/CMI Risk/Need Level**   [Next](#)

LS/CMI Section 1 Score: 18

Risk/Need Level	Very Low	Low	Medium	High	Very High
Section 1 Score	0-4	5-10	11-19	20-29	30-43

After considering any need for a client-based or administrative override, select the appropriate risk/need level

Final Risk/Need Level

Very Low    Low    Medium    High    Very High

[Not Approve](#)   [Approve](#)

**5 (a) If not satisfied with assessors reason for override: select *Not Approve* and inform assessor of decision to not approve the override**

**5 (b) If satisfied with the assessors rationale for applying an override: click on *Approve***

**NOTE**

If an override request has not been approved, the assigned worker will need to go back into the assessment and change the response to Section 6.2/ 6.3 (...*override?*) from *Yes* to *No*.

**Approval type 2: Case closure - no management plan required**

Approvals					
Case	Assigned To	Urn	Offender Name	Stage	
5	Ian McIntosh	S666333/33K	Mister, Spock	LS/CMI 1-8: Risk Level Override Selected	<a href="#">Inspect</a>
53	Ian McIntosh	S000123/12D	Engineer, Scotty	LS/CMI 1-8: Case Closed, No Case Management Required	<a href="#">Inspect</a>
79	Ian McIntosh	S000678/56T	Kirk, Jimmy	LS/CMI 9-11: Case Closed, Case Management Completed	<a href="#">Inspect</a>

1. Click *Inspect* to go into the record

Jump to Page: -----Please Select----- Merle Dixon(S234567)

[Lscmi Section6to8](#)

[Previous](#)

### Planning Selection

Do you wish to continue and create a management plan in Section 9?

No  Yes

Record Destruction Date (YMD): 2023 March 6

[Generate CJSWR](#)

[Approve](#)

2. Amend the *Record Destruction Date*, if required (refer to the record retention policies within your service)

3. Click on *Approve*

**NOTE**

- Selecting *Approve* will close the record down and return you to *Dashboard*.
- The record will remain in the system until the record destruction date has been reached.

### Approval type 3: Case closure - full case with management plan

Approvals					
Case	Assigned To	Urn	Offender Name	Stage	
73	Julie McDonald	S561423/88G	Greene, Maggie	LS/CMI 9-11: Case Closed, Case Management Completed	<a href="#">Inspect</a>

1. Click *Inspect* to go into the record

Jump to Page: -----Please Select-----

Maggie Greene(S561423/88G, 01/01/1986) Case Id: 73, Case M

[Lscmi Section9to11](#)

[Previous](#) [Save](#) [Con](#)

### 11.2 Discharge Summary Narrative

List the offenders current status and recommendations for future interventions / management:

Maggie was released into the community early on compassionate grounds given the tragic death of her partner Glenn... Case for closure/ transfer to supervising local authority.

Record Destruction Date (YMD): 2023 April 11

[Not Approve](#) [Approve](#)

2. Amend the *Record Destruction Date*, if required (refer to the record retention policies within your service)

3. Click on *Approve*

### NOTE

- Selecting *Approve* will close the record down and return you to your *Dashboard*
- It might be worthwhile (for quality assurance purposes) checking the case, or some key aspects of the record, before approving a case closure request.
- Once closed, the case will remain in the system until the record destruction date has been reached.
- Select **Not Approve** to keep the record open and return you to your dashboard (for example when the assigned worker has requested a case closure in error).

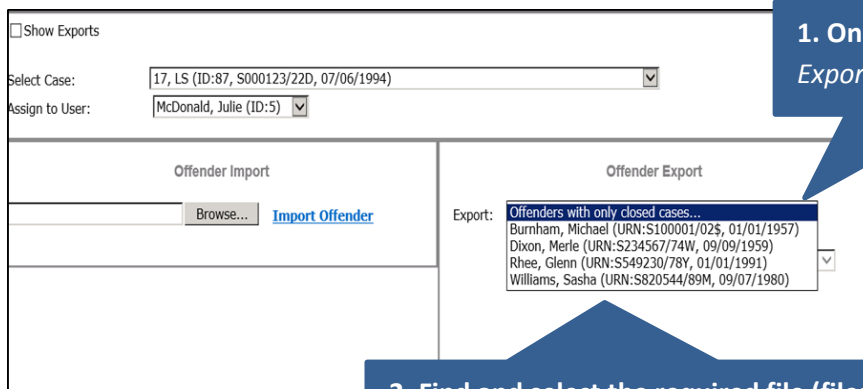
- In situations where the case being closed was subject to different types of plan during the period of intervention (risk management plan vs case management plan), a link to allow you to report on the previous plan will appear at the case closure page. Example (A) below is a 'risk management plan' case for closure which had previously been managed via a case management plan; Example (B) is a 'case management plan' case which had previously been subject to risk management planning. Remember, all the assessments/ reassessments and plans for the case can also be reported on via the *Report* link within the system cases table on the dashboard.

(A):

(B):

- The assessment, any reassessments and management plan used during the period of intervention can also be reported on via the *Report* link within the system cases table on the dashboard (see page 23).

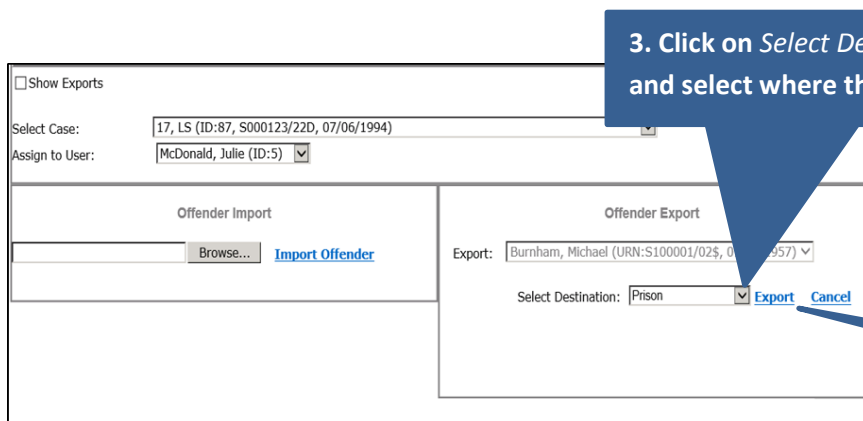
## Exporting



1. On Dashboard, click on *Export* drop down list

2. Find and select the required file (files will be listed alphabetically by surname). Only closed cases can be exported

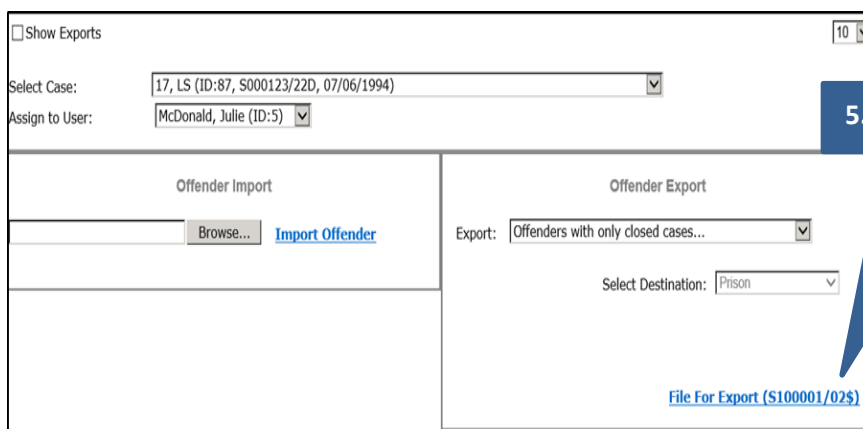
The screenshot shows the 'Offender Export' section with a dropdown menu open. The menu lists several offender records, including 'Burnham, Michael (URN:S100001/02\$, 01/01/1957)', 'Dixon, Merle (URN:S234567/74W, 09/09/1959)', 'Rhee, Glenn (URN:S549230/78Y, 01/01/1991)', and 'Williams, Sasha (URN:S820544/89M, 09/07/1980)'. The 'Export' button is visible next to the dropdown.



3. Click on *Select Destination* drop down list and select where the record is to be sent to

4. Click on *Export*

The screenshot shows the 'Offender Export' section with the 'Select Destination' dropdown menu open. The menu lists 'Prison'. The 'Export' button is visible next to the dropdown.

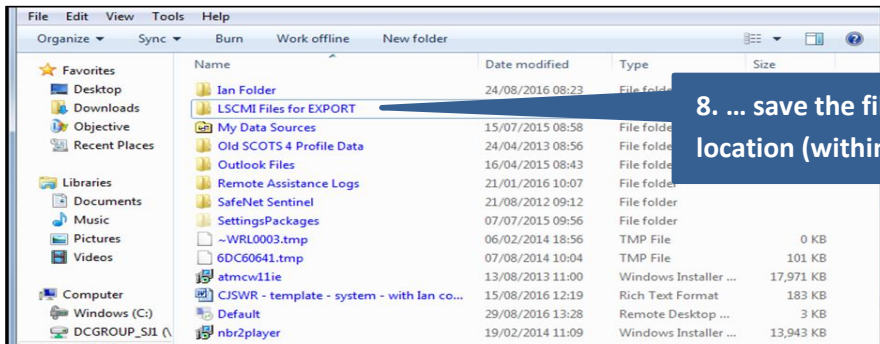


5. Click on *File for Export*

The screenshot shows the 'Offender Export' section with the 'File For Export (S100001/02\$)' button visible at the bottom.



6. Click on drop down, select *Save As* and...



8. ... save the file in the required location (within your network or on pc)



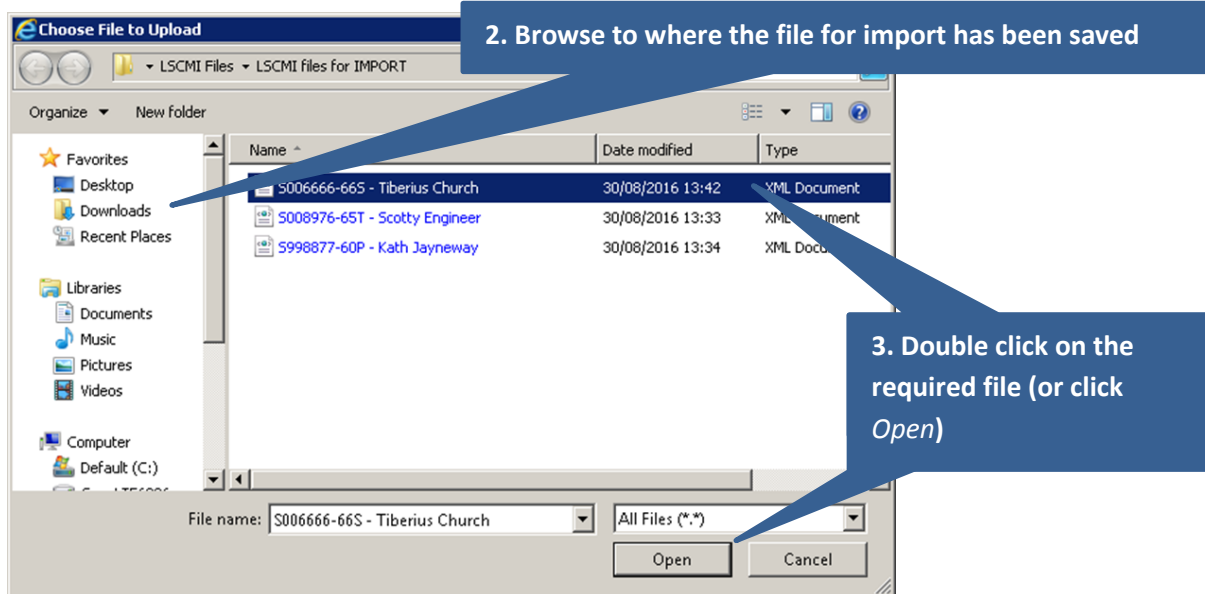
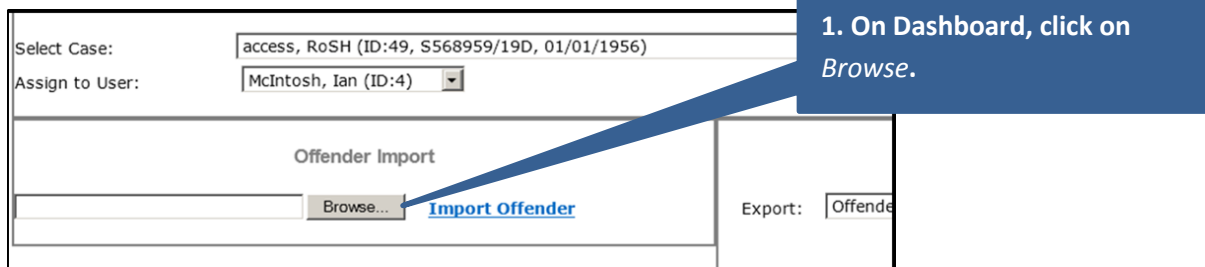
9. Final step: attach the file for export to an email and send to the required area or individual

**NOTE**

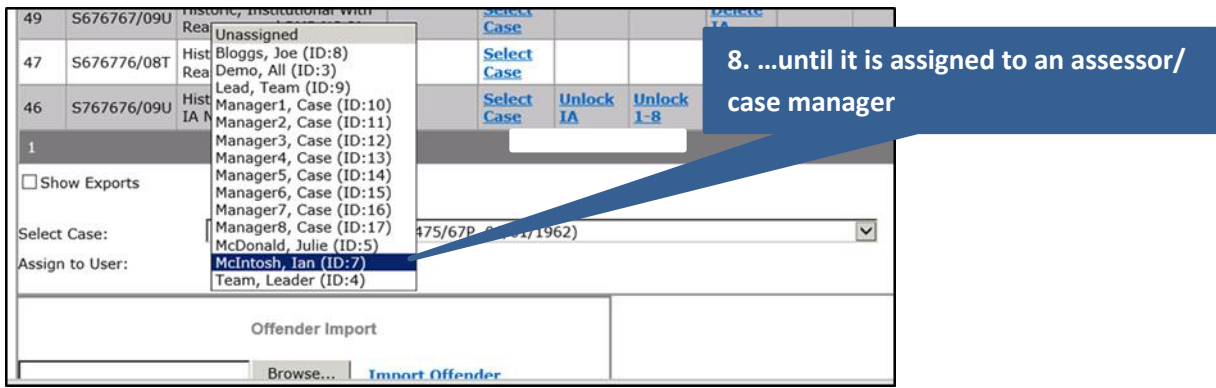
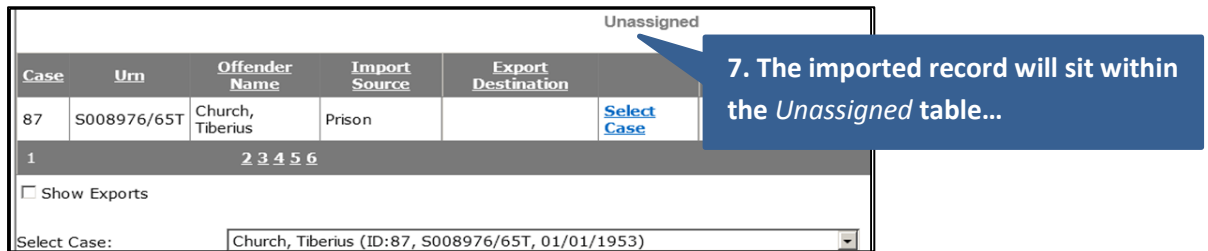
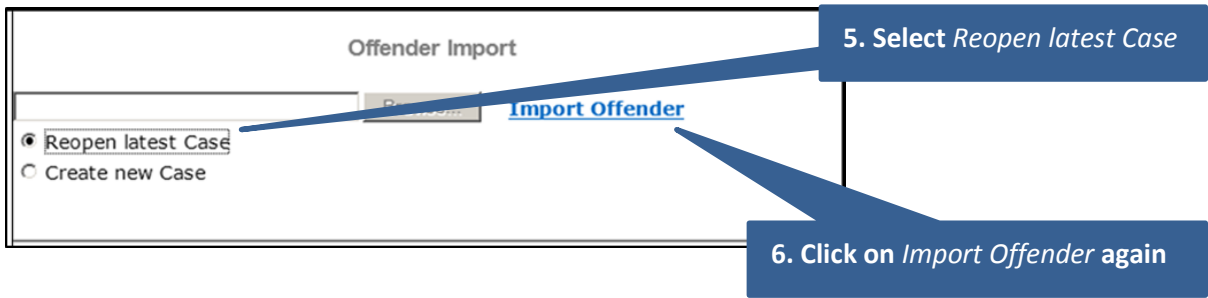
- A list of email addresses for use when exporting LS/CMI files is available. It is advisable to store this list within the *document library* (see pp 28-30)

## Importing

- The LS/CMI file for importing should be sent to your area as an attachment, using secure email
- That attachment needs to be 'Saved/ Saved As' before following the steps below:

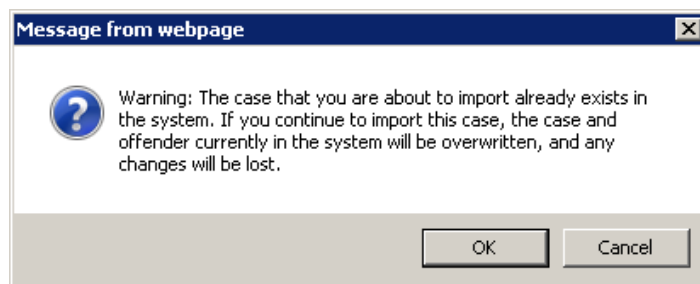






**NOTE**

If a case with the same URN already exists within the system a warning will pop up:



Importing a file will result in all the records relating to that person (whether open or closed) being replaced by the imported file.

Therefore, it is strongly recommended that you select 'Cancel' and check whether the case which already exists within the system is an open or closed case.

Where an **open** case already exists:

The importing service needs to decide whether to:

- proceed with the import (which will result in the open case being replaced by the imported file), or
- Ignore the file for import and continue working with the case that is already open in the system.

If it is a closed case:

- start the import process again
- when the warning box appears, complete the import process by selecting OK

## The 'unassigned' table

The unassigned table fulfils 4 functions:

- Displaying open cases which have yet to be assigned to a worker (for example, when a record has just been imported into the system).
- **Displaying exported records**
- To allow parts of or whole records from the system to be **deleted**. Deleting parts of records is used to rectify common user errors such as selecting reassess by mistake or selecting full assessment instead of initial assessment at the court report stage
- To **unlock** assessments. Unlocking might be required on the rare occasions where an assessor has reached the point of locking the assessment in error.

## Displaying exported records

The screenshot shows a table titled "Unassigned" with the following columns: Case, Urn, Offender Name, Import Source, Export Destination, Delete Case, Delete Initial Assessment, and Delete Latest 1-8. The table contains six rows of data. A callout box labeled "1. Click on Show Exports" points to a checkbox at the bottom left of the table. A second callout box labeled "2. Table will display closed cases which have been exported and the export destination" points to the "Delete Case" and "Delete Initial Assessment" columns. A third callout box labeled "3. Click to 'untick' and table will revert to only displaying open cases which have yet to be assigned" points to the "Show Exports" checkbox.

Case	Urn	Offender Name	Import Source	Export Destination	Delete Case	Delete Initial Assessment	Delete Latest 1-8
80	S443322/08A	test, New case export		Prison	<a href="#">Delete Case</a>	<a href="#">Delete Initial Assessment</a>	<a href="#">Delete Latest 1-8</a>
68	S123456/11D	NoRMP, Test		East Dunbarton	<a href="#">Delete Case</a>	<a href="#">Delete Initial Assessment</a>	<a href="#">Delete Latest 1-8</a>
58	S000002/13\$	case, close	North Ayrshire	Prison	<a href="#">Delete Case</a>	<a href="#">Delete Initial Assessment</a>	<a href="#">Delete Latest 1-8</a>
55	S123456/19D	bloggs, joe		Prison	<a href="#">Delete Case</a>	<a href="#">Delete Initial Assessment</a>	<a href="#">Delete Latest 1-8</a>
54	S000003/13\$	Falkirk, Import Test		Prison	<a href="#">Delete Case</a>	<a href="#">Delete Initial Assessment</a>	<a href="#">Delete Latest 1-8</a>
32	S786767/20A	Kirk, James		South Lanarkshire	<a href="#">Delete Case</a>	<a href="#">Delete Initial Assessment</a>	<a href="#">Delete Latest 1-8</a>

Show Exports

## Deleting

49	S676767/09U	Historic, Institutional with	Unassigned	Select Case		
47	S676776/08T	Historic, Institutional with	Bloggs, Joe (ID:8)	Select Case		
46	S767676/09U	Historic, Institutional with	Demo, All (ID:3)	Select Case	Unlock IA	Unlock 1-8
			Lead, Team (ID:9)			
			Manager1, Case (ID:10)			
			Manager2, Case (ID:11)			
			Manager3, Case (ID:12)			
			Manager4, Case (ID:13)			
			Manager5, Case (ID:14)			
			Manager6, Case (ID:15)			
			Manager7, Case (ID:16)			
			Manager8, Case (ID:17)			
			McDonald, Julie (ID:5)			
			McIntosh, Ian (ID:7)			
			Team, Leader (ID:4)			

Select Case: 475/67P, 01/01/1962

Assign to User: McIntosh, Ian (ID:7)

Offender Import

Browse... Import Offender

1. To delete, the case needs to be unassigned (select *Unassigned*, located at top of *Assign to User* drop down list)

Unassigned											
Case	Urn	Offender Name	Import Source	Select Case	Unlock IA	Unlock 1-8	Delete IA	Delete 1-8	Delete Latest Reassessment	Delete Case	Delete Offender
73	S561423/88G	Greene, Maggie		Select Case	Unlock IA	Unlock 1-8	Delete IA	Delete 1-8	Delete Latest Reassessment	Delete Case	Delete Offender
70	S398475/67P	Peletier, Carol		Select Case		Unlock 1-8			Delete Latest Reassessment	Delete Case	Delete Offender
69	S076039/55T	Grimes, Rick		Select Case					Delete Latest Reassessment	Delete Case	Delete Offender

1 2 3 4 5 6 7 8 9 10 ...

Show Exports 3

Select Case: 17, LS (ID:87, S000123/22D, 07/06/1994)

Assign to User: McIntosh, Ian (ID:7)

2. Select which part of the record needs to be deleted

**Message from webpage**

Are you certain you want to delete the latest reassessment from the system? (Please Note: Exporting offender first allows und...)

OK Cancel

3. A warning message will pop up. Click on OK to proceed with the deletion

49	S676767/09U	Historic, Institutional with Real	Unassigned	Select Case			Delete IA
47	S676776/08T	Historic, Institutional with Real	Bloggs, Joe (ID:8) Demo, All (ID:3)	Select Case			
46	S767676/09U	Historic, Institutional with Real	Lead, Team (ID:9) Manager1, Case (ID:10) Manager2, Case (ID:11) Manager3, Case (ID:12) Manager4, Case (ID:13) Manager5, Case (ID:14) Manager6, Case (ID:15) Manager7, Case (ID:16) Manager8, Case (ID:17)	Select Case	Unlock IA	Unlock 1-8	Delete IA

1

Show Exports

Select Case: [475/676/01/1962]

Assign to User: **McIntosh, Ian (ID:7)**  
Team, Leader (ID:4)

Offender Import

Browse... Import Offender

4. Reassign the case back to whoever needs it

**NOTE**

- Use **Delete 1-8** if an assessor has started a ‘full LS/CMI 1-8 assessment’ by mistake (instead of ‘initial assessment’) at the court report stage.
- Use **Delete Reassessment** if an assessor has selected ‘reassess’ by mistake.
- Use **Delete Case** in situations where a new case has been started but definitely cannot be completed (use with caution as this will delete the entire case no matter how little or how much has been completed).
- **Delete Offender** is a ‘nuclear option’ as it will result in all records relating to the individual (current and past cases) being deleted from the system.

# Unlocking

49	S676767/09U	Historic, Institutional with	Unassigned	Select Case	IA
47	S676776/08T	Historic	Bloggs, Joe (ID:8)	Select Case	
46	S767676/09U	Historic	Demo, All (ID:3)	Select Case	
1				Select Case	Unlock IA
<input type="checkbox"/> Show Exports				Unlock 1-8	Delete IA
Select Case: 475/67P, 01/01/1962					
Assign to User:				Manager1, Case (ID:10) Manager2, Case (ID:11) Manager3, Case (ID:12) Manager4, Case (ID:13) Manager5, Case (ID:14) Manager6, Case (ID:15) Manager7, Case (ID:16) Manager8, Case (ID:17) McDonald, Julie (ID:5) <b>McIntosh, Ian (ID:7)</b> Team, Leader (ID:4)	
Offender Import					
Browse... Import Offender					

1. To unlock as assessment, the case needs to be unassigned (select *Unassigned*, located at top of *Assign to User* drop down list)

Unassigned						
Case	Urn	Offender Name	Import Source	Select Case	Unlock IA	Unlock 1-8
73	S561423/88G	Greene, Maggie		Select Case	Unlock IA	Unlock 1-8
70	S398475/67P	Peletier, Carol		Select Case		Unlock 1-8
69	S076039/55T	Grimes, Rick		Select Case		Unlock 1-8

2. Select which part of the record needs to be deleted

To unlock an initial assessment, select *Unlock IA*

To unlock a full LS/CMI 1-8 assessment, select *Unlock 1-8*

**Message from webpage**

Are you certain you want to unlock the latest 1-8 for this case?

OK Cancel

3. A warning message will pop up. Click on OK to proceed with unlocking

49	S676767/09U	Historic, Institutional with	Unassigned	Select Case	IA
47	S676776/08T	Historic	Bloggs, Joe (ID:8)	Select Case	
46	S767676/09U	Historic	Demo, All (ID:3)	Select Case	
1				Select Case	Unlock IA
<input type="checkbox"/> Show Exports				Unlock 1-8	Delete IA
Select Case: 475/67P, 01/01/1962					
Assign to User:				Manager1, Case (ID:10) Manager2, Case (ID:11) Manager3, Case (ID:12) Manager4, Case (ID:13) Manager5, Case (ID:14) Manager6, Case (ID:15) Manager7, Case (ID:16) Manager8, Case (ID:17) McDonald, Julie (ID:5) <b>McIntosh, Ian (ID:7)</b> Team, Leader (ID:4)	
Offender Import					
Browse... Import Offender					

4. Reassign the case back to whoever needs it

## System Cases Table

This table can be used for a number of tasks. For example:

- Displaying all records – both open and closed – within your LS/CMI system
- Viewing assessments and management plans for cases that are not assigned to you
- Reporting on cases (extracting information from cases and placing them onto documents)

For line managers it might be particularly useful to find/ display records assigned to specific assessors or case managers:

**System Cases** ([Show Filter Controls](#))

Case	Urn	Offender Name		
89	S100001/02\$	Burnham, Michael	<a href="#">View</a>	<a href="#">Report</a>
88	S123123/44F	Content, Test	<a href="#">View</a>	<a href="#">Report</a>
87	S000123/22D	Burnham, Michael	<a href="#">View</a>	<a href="#">Report</a>
86	S483491/55R	Vash, Vish	<a href="#">View</a>	<a href="#">Report</a>
85	S089234/77N	bash, Bish	<a href="#">View</a>	<a href="#">Report</a>
84	S765341/88Y	Lash, Lish	<a href="#">View</a>	<a href="#">Report</a>

1. Click on *Show Filter Controls*

**System Cases** ([Hide Filter Controls](#))

URN:  Loc Ref:

Forename:  Surname:

Alias:  DOB:

Latest Case Versions:  Must be Open:

Gender:  Both  Male  Female    Review Date (Within Days):

Assigned to User:

Reporting Requirement:

LSIR:SV Band:     d:

Cases With Locked IA Only:

[Clear](#) [Apply](#)

Case	Urn		
89	S100001/02\$	<a href="#">View</a>	<a href="#">Report</a>

2. Select *Must be Open*

3. Use *Assigned to User* drop down list to find and select the required assessor/ case manager

System Cases ([Hide Filter Controls](#))

URN:  Loc Ref:

Forename:  Surname:

Alias:  DOB:

Latest Case Versions:  Must be Open:

Gender:  Both  Male  Female Review Date (Within Days):

Assigned to User:

Reporting Requirement:

LSIR:SV Band:  LSCMI 1-8 Band:

Cases With Locked IA Only:  Cases With Locked 1-8 Only:

[Clear](#) [Apply](#)

Case	Urn	Offender Name		
87	S000123/22D	Burnham, Michael	<a href="#">View</a>	
84	S765341/88Y	Lash, Lish	<a href="#">View</a>	<a href="#">Report</a>
83	S637382/87H	Kash, Kish	<a href="#">View</a>	<a href="#">Report</a>
82	S100000/02\$	Nash, Nish	<a href="#">View</a>	<a href="#">Report</a>
81	S121311/65N	Check, Check	<a href="#">View</a>	<a href="#">Report</a>
73	S561423/88G	Greene, Maggie	<a href="#">View</a>	<a href="#">Report</a>

4. Click on *Apply...*

5. ...to display only cases which are open to the specified worker

Remember...

System Cases ([Show Filter Controls](#))

Case:  Urn:  Offender Name:

90 (+) S100001/02\$ Picard, Jean Luc [View](#) [Report](#)

88 S123123/44F Content, Test [View](#) [Report](#)

87 S000123/22D Burnham, Michael [View](#) [Report](#)

86 S483491/55R Vash, Vish [View](#) [Report](#)

85 S089234/77N bash, Bish [View](#) [Report](#)

84 S765341/88Y Lash, Lish [View](#) [Report](#)

83 S637382/87H Kash, Kish [View](#) [Report](#)

82 S100000/02\$ Nash, Nish [View](#) [Report](#)

81 S121311/65N Check, Check [View](#) [Report](#)

80 S123123/09R Demo, Davie [View](#) [Report](#)

10

The (+) sign will show where there is more than one record for that person. Click on (+) to display all

Records can be sorted alphabetically (by surname) by clicking on *Offender Name*

To print all or part of a record, select *Report*

The smaller the case number, the older the record will be...and vice versa

The number of cases displayed on the table can be increased or decreased by using this drop down



## Administration

The Administration link can be used for a number of tasks including:

- Viewing all **Users** of the system
- Viewing which **User Group** any individual user is currently assigned to
- Viewing the **Permissions** assigned to any User Group
- Producing a **System Report**. Please refer to the guide *The LS/CMI system report: starting to understand the data for* how to produce and make use of the system report

## Viewing Users

Open Tasks				System			
Case	Urn	Offender Name	Stage	Case	Urn	Offender Name	Stage
<a href="#">Continue</a>	89	S000001/13D	Test, OLR	Offender History	89	S000001/13D	Test, OLR
				10	87	S008976/65T	Church, ...
					84	S564831/44R	Main, Ja...
					83	S899895/22D	report, ...

On Dashboard, click on Administration...

ID	User Name	Title	Forename	Surname	Email	Phone	DOB
<a href="#">User Groups</a>	1	CManager	Case	Manager	<a href="mailto:cmanager@tra...">cmanager@tra...</a>		07/01/2016 15:12:46
<a href="#">User Groups</a>	3	JJones	Jayne	Jones	<a href="mailto:aa@ii.com">aa@ii.com</a>		14/08/2015 09:00:01
<a href="#">User Groups</a>	4	Ian	Ian	McIntosh	<a href="mailto:ian.mc@training.com">ian.mc@training.com</a>		08/09/2016 09:31:50
<a href="#">User Groups</a>	5	LKerr	Les	Kerr	<a href="mailto:lk@k.com">lk@k.com</a>		02/03/2016 09:09:41
<a href="#">User Groups</a>	6	JBlog	John	Bloggs	<a href="mailto:jj@jj.com">jj@jj.com</a>		10/08/2015 14:23:56
<a href="#">User Groups</a>	7	training1	Trainer	One	<a href="mailto:tt@jj.com">tt@jj.com</a>		15/04/2016 14:12:07
<a href="#">User Groups</a>	8	training2	Trainer	Two	<a href="mailto:hh@c.com">hh@c.com</a>		
<a href="#">User Groups</a>	9	training3	Trainer	Three	<a href="mailto:jjj@jj.com">jjj@jj.com</a>		
<a href="#">User Groups</a>	10	training4	Trainer	Four	<a href="mailto:uu@h.com">uu@h.com</a>		
<a href="#">User Groups</a>	11	training5	Trainer	Five	<a href="mailto:kk@c.com">kk@c.com</a>		
<a href="#">User Groups</a>	12	Jule	Jule	McDonald	<a href="mailto:jule@training.com">jule@training.com</a>		07/09/2016 10:29:40
<a href="#">User Groups</a>	16	ogradyj	James	O'Grady	<a href="mailto:jogrady@training.com">jogrady@training.com</a>		16/12/2015 09:23:02
<a href="#">User Groups</a>	19	Mark	Mark	McSherry	<a href="mailto:mark.mcsherry@RMAScotland.gsi.gov.uk">mark.mcsherry@RMAScotland.gsi.gov.uk</a>		17/08/2016 14:43:15
<a href="#">User Groups</a>	20	TL	Ian	McIntosh	<a href="mailto:imcTL@training.com">imcTL@training.com</a>		08/09/2016 09:38:31

...to view details of any user of the system

	ID	User Name	Title	Forename	Surname	Email	Phone	Prison	Last Login	Locked
User_Groups	1	CManager		Case	Manager	<a href="mailto:cmanager@training.com">cmanager@training.com</a>			07/01/2016 15:12:46	<input type="checkbox"/>
User_Groups	3	JJones		Jayne	Jones	<a href="mailto:aa@i.com">aa@i.com</a>			14/08/2015 09:00:01	<input type="checkbox"/>
User_Groups	4	Ian		Ian	McIntosh	<a href="mailto:ian.mc@training.com">ian.mc@training.com</a>			08/09/2016 09:31:50	<input type="checkbox"/>
User_Groups	5	LKerr		Les	Kerr	<a href="mailto:l@k.com">l@k.com</a>			02/03/2016 09:09:41	<input type="checkbox"/>
User_Groups	6	JBlog		John	Bloggs	<a href="mailto:jj@jj.com">jj@jj.com</a>			10/08/2015 14:23:56	<input type="checkbox"/>
User_Groups	7	training1		Trainer	One	<a href="mailto:tt@jj.com">tt@jj.com</a>			15/04/2016 14:12:07	<input type="checkbox"/>
User_Groups	8	training2		Trainer	Two	<a href="mailto:hh@c.com">hh@c.com</a>				<input type="checkbox"/>
User_Groups	9	training3		Trainer	Three	<a href="mailto:jjj@jj.com">jjj@jj.com</a>				<input type="checkbox"/>
User_Groups	10	training4		Trainer	Four	<a href="mailto:uu@h.com">uu@h.com</a>				<input type="checkbox"/>
User_Groups	11	training5		Trainer	Five	<a href="mailto:kk@c.com">kk@c.com</a>				<input type="checkbox"/>
User_Groups	12	Jule		Jule	McDonald	<a href="mailto:jule@training.com">jule@training.com</a>			07/09/2016 10:29:40	<input type="checkbox"/>
User_Groups	16	ogradyj		James	O'Grady	<a href="mailto:jogrady@training.com">jogrady@training.com</a>			16/12/2015 09:23:02	<input type="checkbox"/>
User_Groups	19	Mark		Mark	McSherry	<a href="mailto:mark.mcsberry@RMAScotland.gsi.gov.uk">mark.mcsberry@RMAScotland.gsi.gov.uk</a>			17/08/2016 14:43:15	<input type="checkbox"/>
User_Groups	20	TL		Ian	McIntosh	<a href="mailto:imcTL@training.com">imcTL@training.com</a>			08/09/2016 09:38:31	<input type="checkbox"/>

Users can be sorted alphabetically by clicking on *Forename* or *Surname*

If ticked [✓], the user will be locked out of the system

The number of lines displayed on the table can be increased or decreased by using this drop down

## Viewing User Groups

	ID	User Name	Title	Forename	Surname	
<a href="#">User Groups</a>	1	CManager		Case	Manager	
<a href="#">User Groups</a>	3	JJones		Jayne	Jones	<a href="#">jj@jj.c</a>
<a href="#">User Groups</a>	4	Ian		Ian	McIntosh	<a href="#">ian.mc</a>
<a href="#">User Groups</a>	5	LKerr		Les	Kerr	<a href="#">l@k.co</a>
<a href="#">User Groups</a>	6	JBlogg		John	Bloggs	<a href="#">jj@jj.c</a>

In this example, to see which group John Bloggs is assigned to, click on [User Groups](#)

	ID	Group Name
<a href="#">System Permissions</a>	2	Team Leader

John Bloggs is...

...currently assigned to the *Team Leader* User Group

	ID	Group Name
<a href="#">System Permissions</a>	2	Team Leader

If required, use this drop down list to select another user to view which group they are assigned to

## Viewing permissions

The screenshot shows the 'System Permissions' page for user 'John Bloggs'. The breadcrumb trail is 'Users > User Groups > System Permissions'. The 'Select User:' dropdown is set to '6: John Bloggs'. Below the breadcrumb, there is a table with columns 'System Permissions', 'ID', and 'Group Name'. The first row shows 'System Permissions' with ID '2' and 'Group Name' 'Team Leader'. A blue arrow points from the 'System Permissions' link in the breadcrumb to the 'System Permissions' column header in the table.

In this example, to see the permissions anybody within the Team Leader group have, click on *System Permissions*

The screenshot shows the 'System Permissions' page for the 'Team Leader' user group. The breadcrumb trail is 'Users > User Groups > System Permissions'. The 'Select User Group:' dropdown is set to '2: Team Leader'. Below the breadcrumb, there is a table with columns 'ID', 'Page', 'Level', and 'Assign'. The table contains the following data:

ID	Page	Level	Assign
10	Web Page Content	Write	<input type="checkbox"/>
20	User Administration	Read	<input checked="" type="checkbox"/>
30	User Administration	Write	<input type="checkbox"/>
40	User Group Administration	Read	<input checked="" type="checkbox"/>
50	User Group Administration	Write	<input type="checkbox"/>
60	System Audit	Read	<input checked="" type="checkbox"/>
65	System Reports	Read	<input checked="" type="checkbox"/>

The permissions assigned to that User Group will be ticked [✓]

This drop down can be used to view the permissions for a different User Group

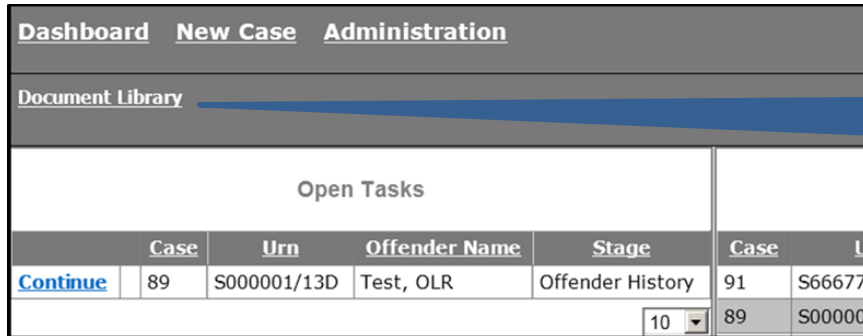
The screenshot shows the 'System Permissions' page with the 'Select User Group:' dropdown menu open. The dropdown list includes the following options: '2: Team Leader', '1: Clinical User', '2: Team Leader', '3: Business Admin', '4: Case Management Access', '5: Read Only Service Manager', '6: IT Admin', '7: Maintenance', '8: Case Only', '9: MFMC Only', '11: New One', '12: spec', and '13: LS & Caledonian'. The table below the dropdown shows the permissions for the selected group. A blue arrow points from the dropdown menu to the 'Help' link in the top right corner of the page.

For more information on permissions, click on *Help*

The number of permissions displayed on the table can be increased or decreased by using this drop down

## Library

Accessing documents stored within the library:



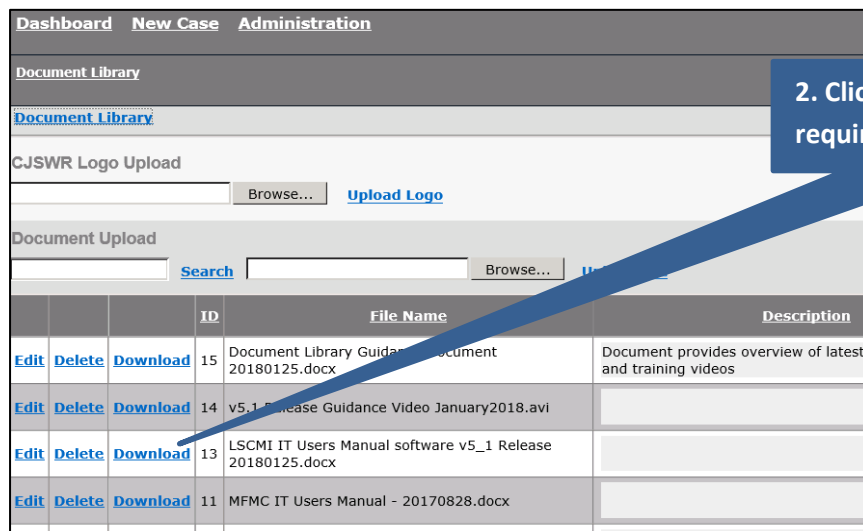
Dashboard New Case Administration

Document Library

Open Tasks

	Case	Urn	Offender Name	Stage	Case	U
<a href="#">Continue</a>	89	S000001/13D	Test, OLR	Offender History	91	S66677
					89	S00000

1. On Dashboard click Document Library



Dashboard New Case Administration

Document Library

[Document Library](#)

CJSWR Logo Upload

Browse... [Upload Logo](#)

Document Upload

Search Browse...

	ID	File Name	Description
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Download</a>	15	Document Library Guidance Document 20180125.docx	Document provides overview of latest and training videos
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Download</a>	14	v5_1 Release Guidance Video January2018.avi	
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Download</a>	13	LSCMI IT Users Manual software v5_1 Release 20180125.docx	
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Download</a>	11	MFMC IT Users Manual - 20170828.docx	

2. Click on Download for the required document



3. Click on Open

## Adding a document to the library:

Dashboard **New Case** Administration

Document Library

Open Tasks

	Case	Urn	Offender Name	Stage	Case	U
<a href="#">Continue</a>	89	S000001/13D	Test, OLR	Offender History	91	S66677
					89	S00000

10

1. On Dashboard click Document Library

Dashboard **New Case** Administration

Document Library

[Document Library](#)

CJSWR Logo Upload

[Upload Logo](#)

Document Upload

[Upload File](#)

			ID	File Name	Description
<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Download</a>	15	Document Library Guidance Document 20180125.docx	Document provides overview of latest and training videos
<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Download</a>	14	v5.1 Release Guidance Video January2018.avi	
<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Download</a>	13	LSCMI IT Users Manual software v5_1 Release 20180125.docx	
<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Download</a>	11	MFMC IT Users Manual - 20170828.docx	

2. Click on *Browse* and...

Choose File to Upload

Julie McDonald Search Julie McDonald

Organize New folder

Favorites: Desktop, Downloads, Recent Places

Libraries: Documents, Music, Pictures, Videos

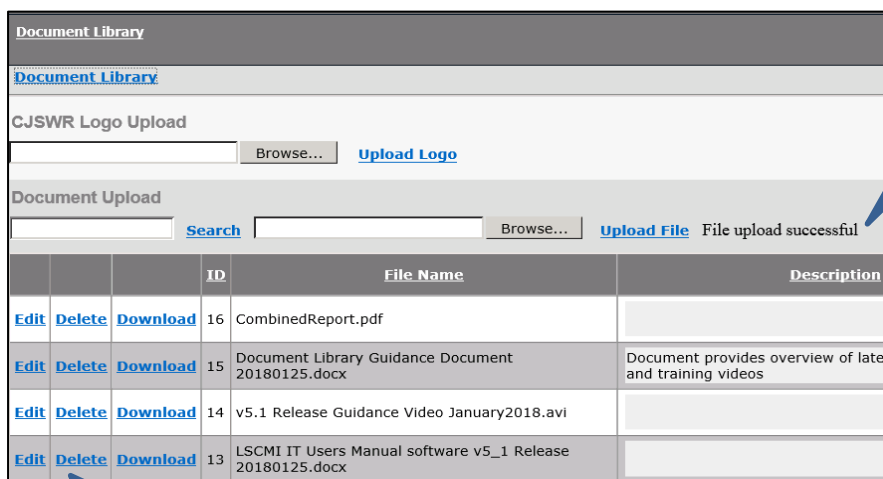
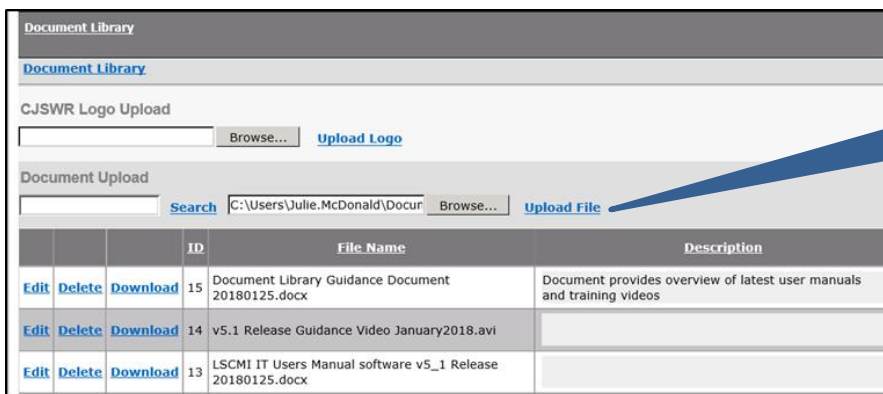
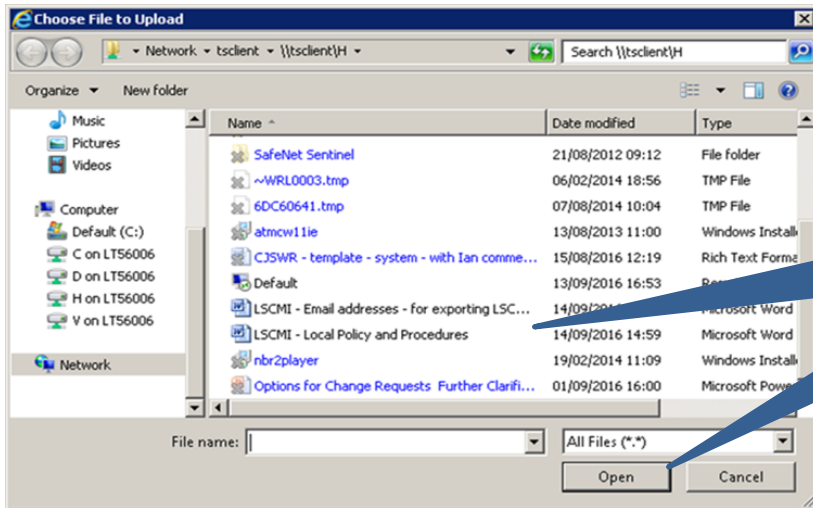
Computer: OSDisk (C:), data1\_1 (D:)

Network

AppData, Contacts, Desktop, Downloads, Favorites, Links, My Documents, My Music, My Pictures, My Videos, Saved Games, Searches

File name:  All Files (\*.\*)

3. ...browse to where the document is stored



7. Out of date documents can be deleted/ replaced

#### NOTE

- If the *Document Library* link is not visible on user dashboards, contact your system business administrator to ensure the appropriate library permissions (write and/ or read access) are assigned to those groups who need it.
- Access right 70 (Document Library – Read) is likely to be appropriate for all user groups as this will allow the user to access and read any document stored within the library
- Access right 80 (Document Library – Write) allows a user to add and remove documents from the library. As a result, it is recommended that this access right be provided to a limited number of users/ groups only.



