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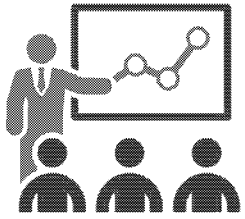
CHINOOK

Chinook 1.0 Training Plan



July

21 July
Mod 3 & 4

23 July
Mod 5
Natasha Oickle

28 July
Mod 3 & 4

August

11 August
Mod 1

13 August
Mod 5
Natasha Oickle

25 August
Mod 1

25 August
Mod 2

September

15 September
Mod 2

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CHINOOK

1 File Management
2 Pre-Assessment
3 Decision Maker
4 [illegible] Decision
5
6 Quality Assurance
7 ToolBox

USER GUIDE - Module 1

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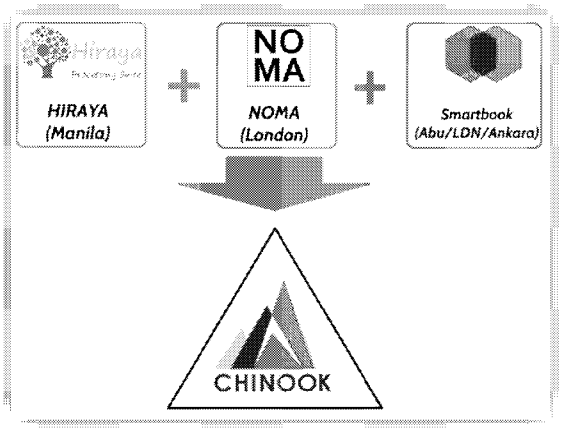
INTRODUCTION

Chinook is a cross-network Temporary Resident (TR) processing suite developed by International Network (IN) – Centralized Network (CN) and Domestic Network (DN), with the support of IT Operations. This modern solution invoked several IRCC talents and stimulated the synergy of the group.

History

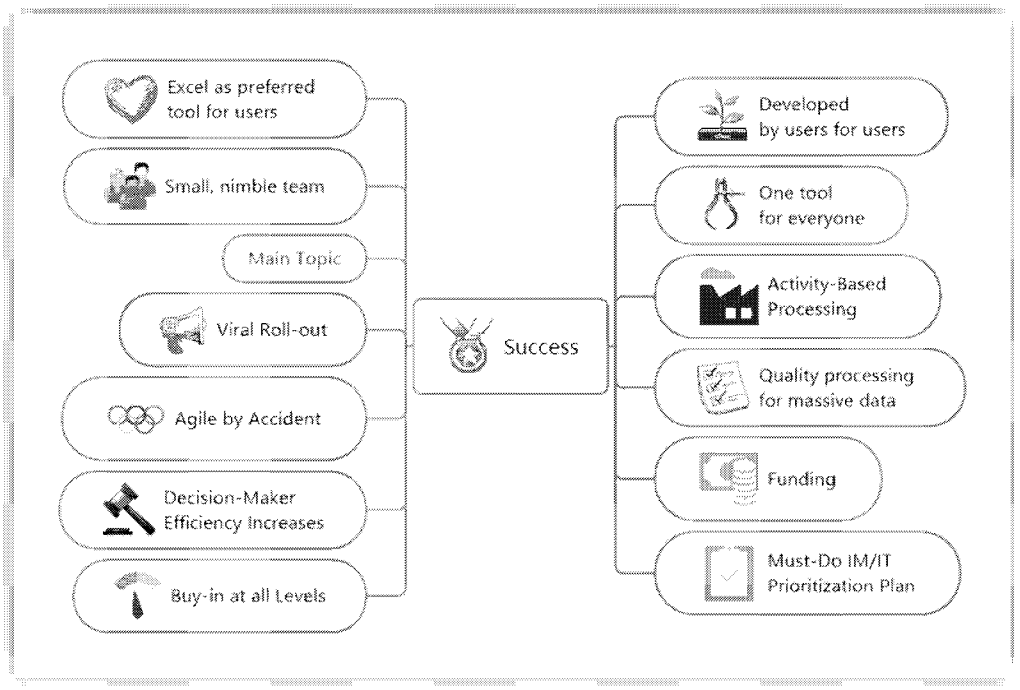


Overall goals

Apart from the time saving and the efficiency that Chinook provides, there are the 3 main objectives:

- Replacing various office-specific tools
- Standardizing work sharing procedures
- Streamlining process regardless of processing office

Chinook Success



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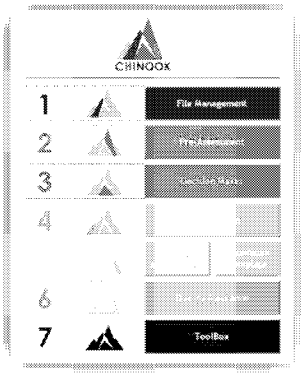
Overview



Chinook suite consists of six (6) modules with an additional toolbox. It unifies TR Process for the Integrated Network (excluding extensions).

Launch & documentation

Requirements

CHINOOK requires IRCC Professional Laptop or Desktop, Windows & MS Excel up-to-date, your IRCC email and windows password and GCMS account.

Privacy statement

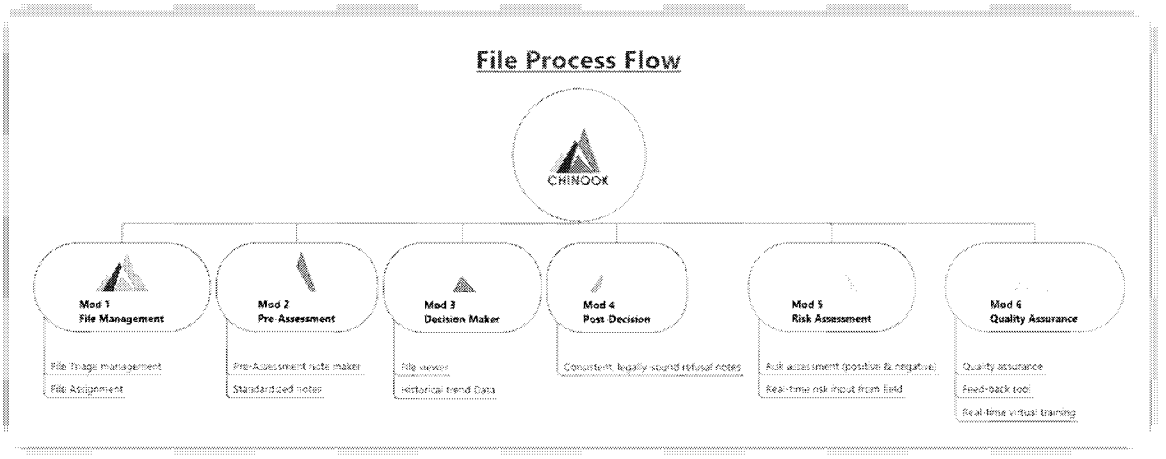
By using **Chinook**, the user recognizes having read IRCC rules of ethics and confidentiality in the training module: Protecting and Giving Access to Information at CIC (CC5540). If it is not done yet, we invite you to do it before using **Chinook**.

Access request

Chinook project is managed by the business coordinator (IN). For more information about ask your manager.

→ Any comments, suggestions, thoughts or compliments? Please contact: IN Chinook / Chinook RI (IRCC)

File process flow



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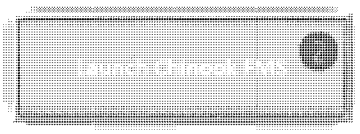
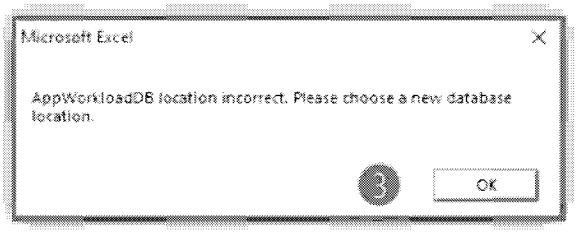
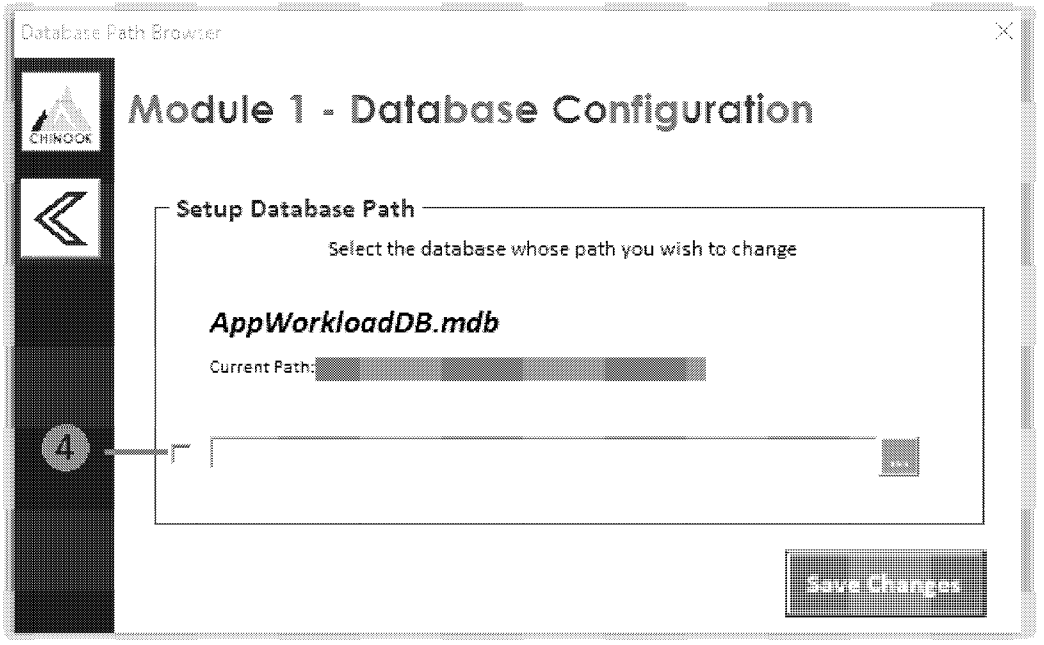
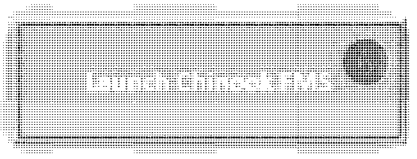
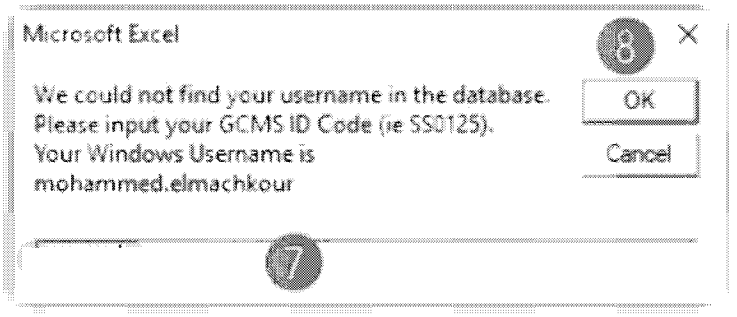




Check 4 the **box** and to lead Chinook to the new **database location** then save your changes.







<u>On the first use,</u> you need to 5 **Restart Chinook.** Click the 6 **Launch button.** You have to 7 **Enter** and 8 **Valid** your **GCMS ID**. If you do not have access to GCMS, ask your GCMS access coordinator.

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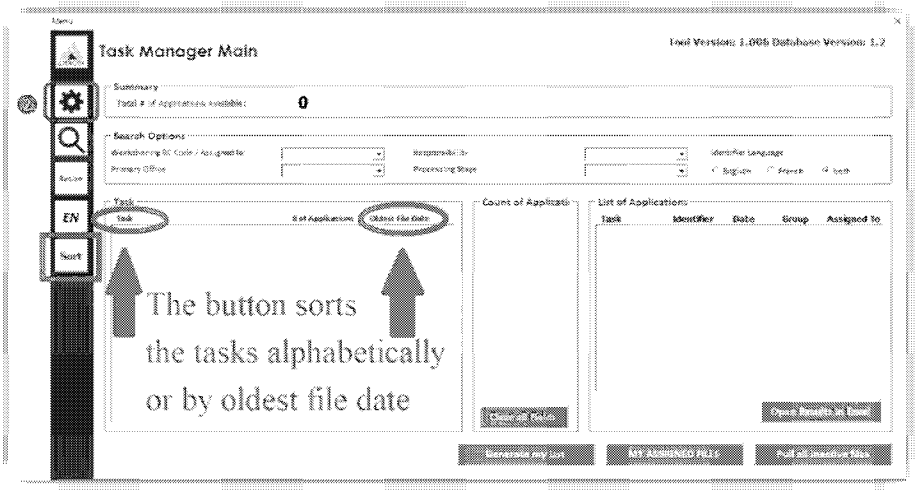
Setup & Administration

This customizing section contains 3 main tabs: **Data options**, **Admin options** and **Full File List**
In this module, we will focus only on Full File List options.

Data options

Data upload for offices of interests

This part of the program is also managed by officers with administrator permissions. **The first step** consists on downloading the **Mod 1** data set from the **EDW folder** into the designated **Data folder** in the local drive. Here is the link to the Chinook EDW folder.



1 **Launch Chinook FMS** button again then 2 **Setup & Administration button** to open and finish your setup & administration. 3 **browse** to your warehouse database then upload the file named:
Chinook - Mod 1.csv

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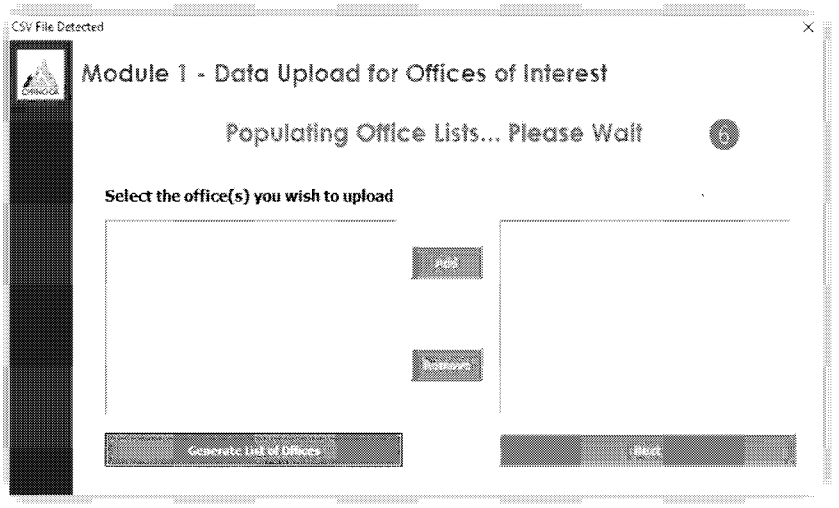

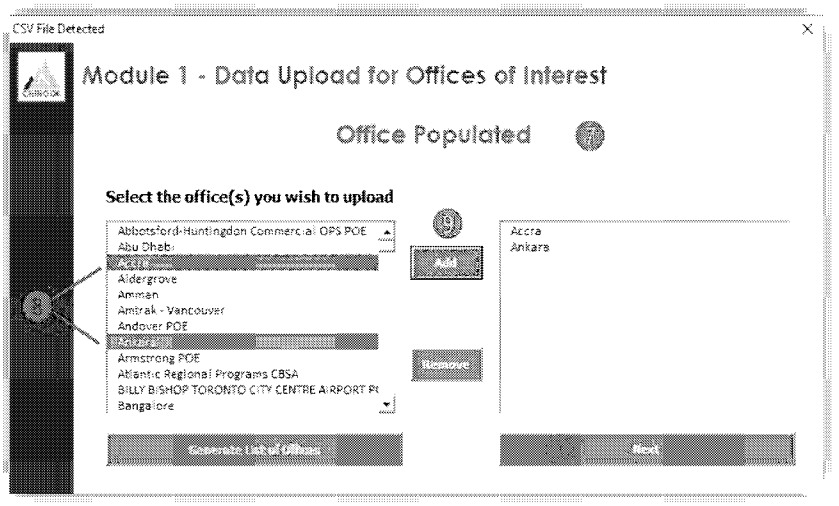

Select 8 **the offices** you want to upload, click 9 **the ADD** button then click 10 the next button. The office selection will be saved and appear each time you upload the data in Module 1.

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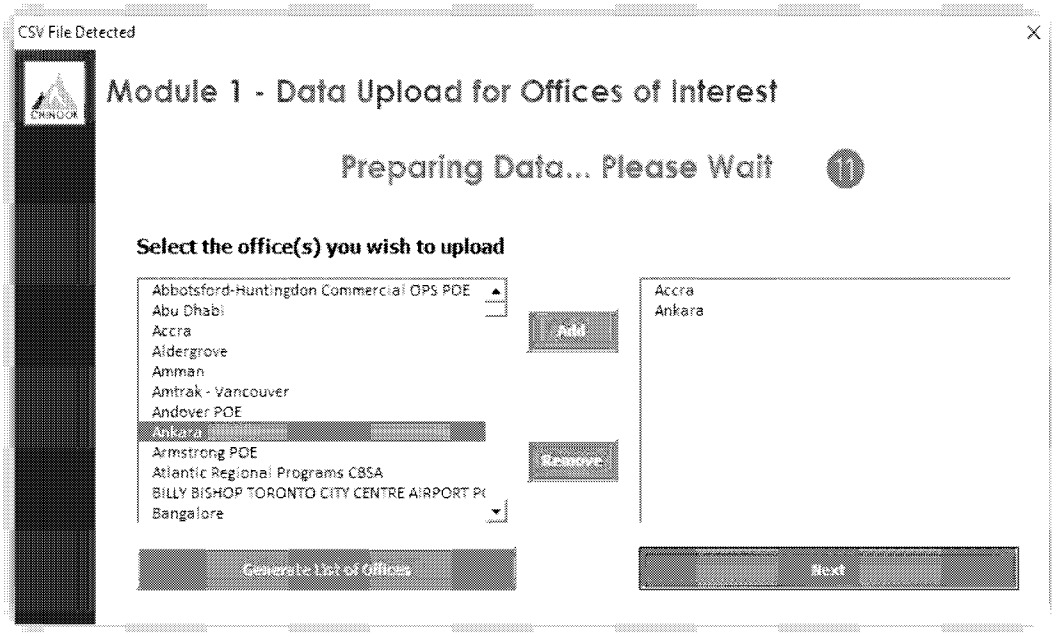
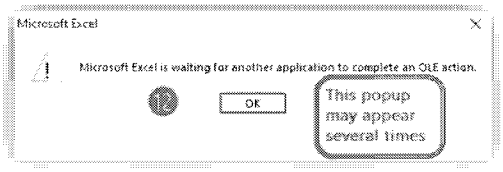
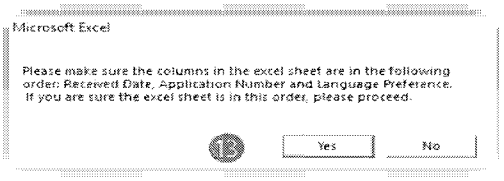
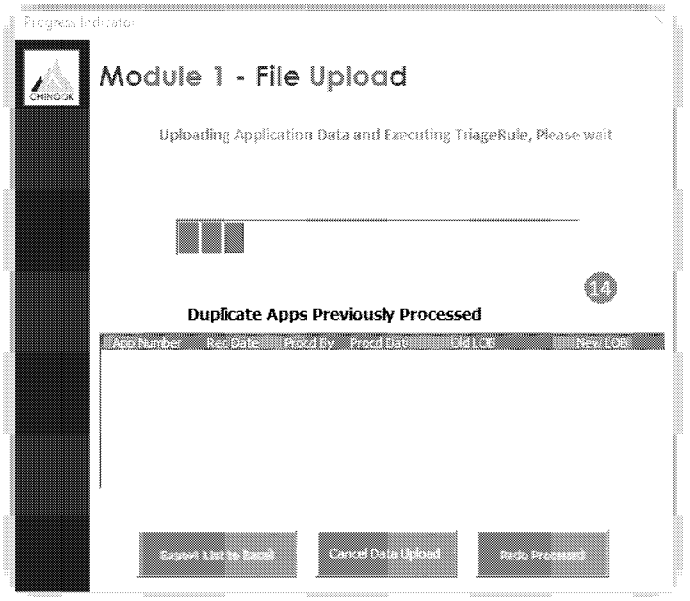






You may have to click the 12 **OK** button in this popup several times before it disappears when you click 13 **YES.** It takes a few seconds to 14 **Upload** the file. The criteria is prepared and the connection to database is established. The data will be fetched from the Excel file.



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Before the upload is complete, you have the option to: 15 **Merge** new and processed files with applications that are duplicates and have not changed their state in GCMS so that applications pulled previously but not processed will not appear as available in Module 1; 16 **Cancel** the upload; and 17 **Overwrite** as normal if duplicates are encountered so that applications pulled previously but not processed will appear as available in Module 1.

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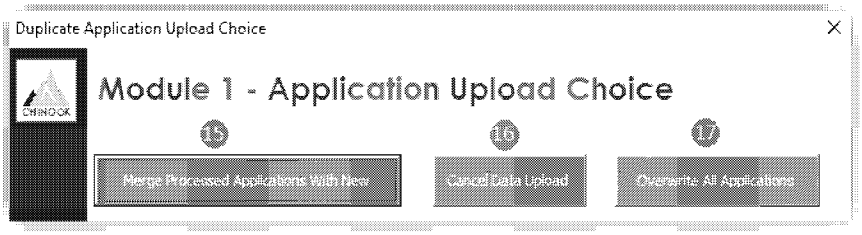
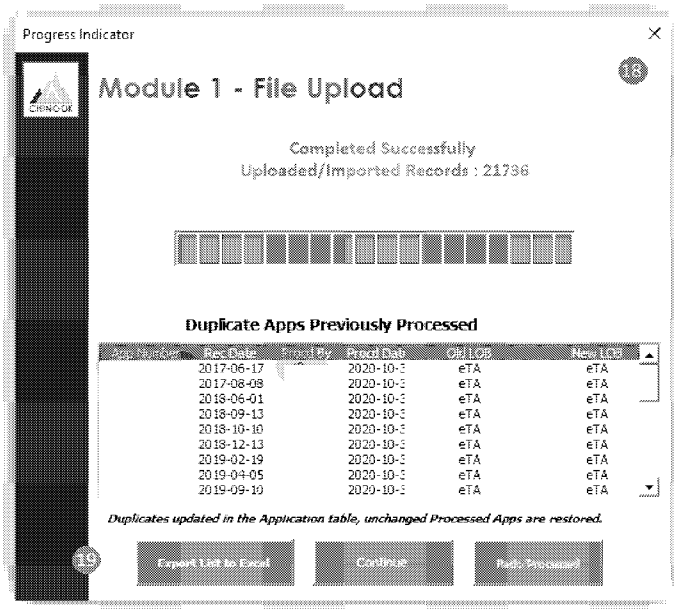


Close the dialogue box when the upload is 18 **finished** or 19 **Export** the list to Excel.



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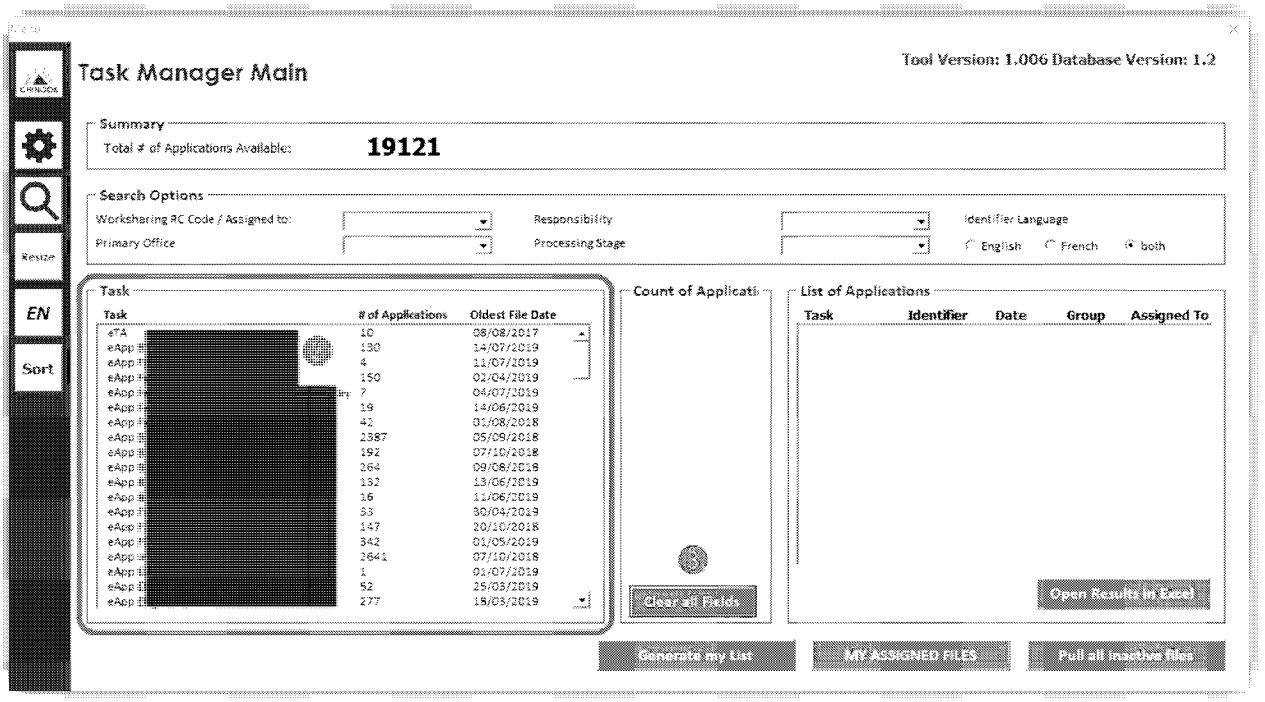
File assignment to GCMS ID

In this section you will be able to assign applications to your GCMS ID. 1 **Launch Chinook FMS** button again. The 2 **Task list** will show up. You can 3 **clear all fields** or 4 **Workshare** with a 5 **primary office.**



Precise 6 **Responsibility,** 7 **Processing stage** and the 8 **Identifier language**.

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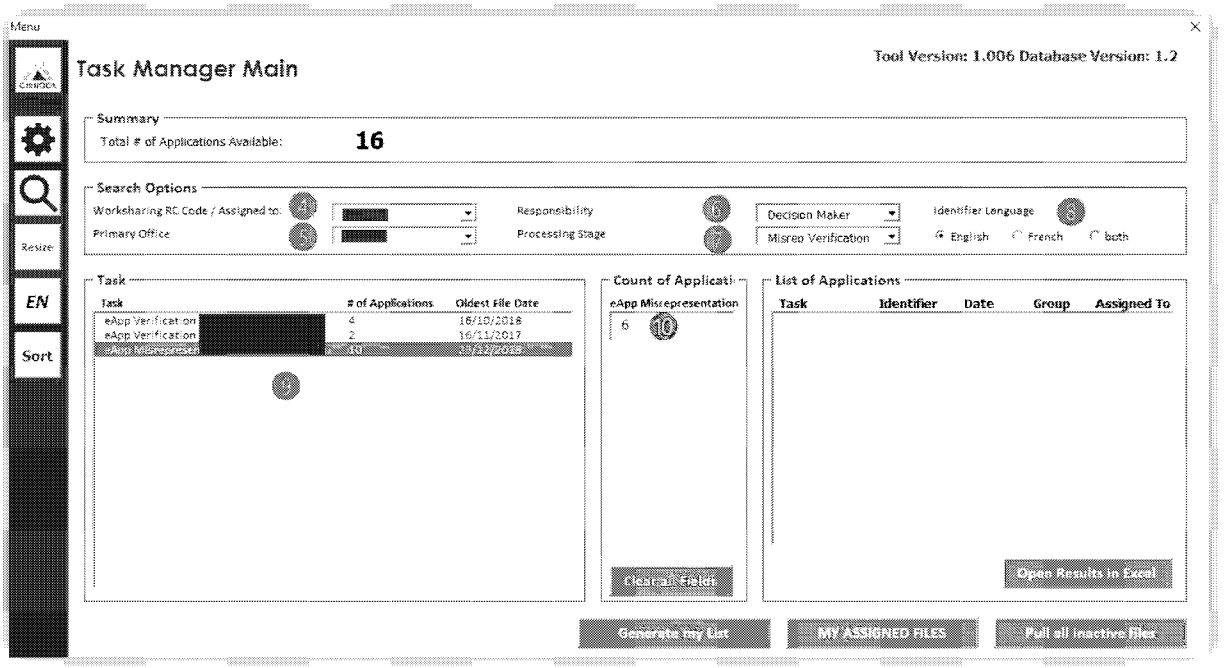
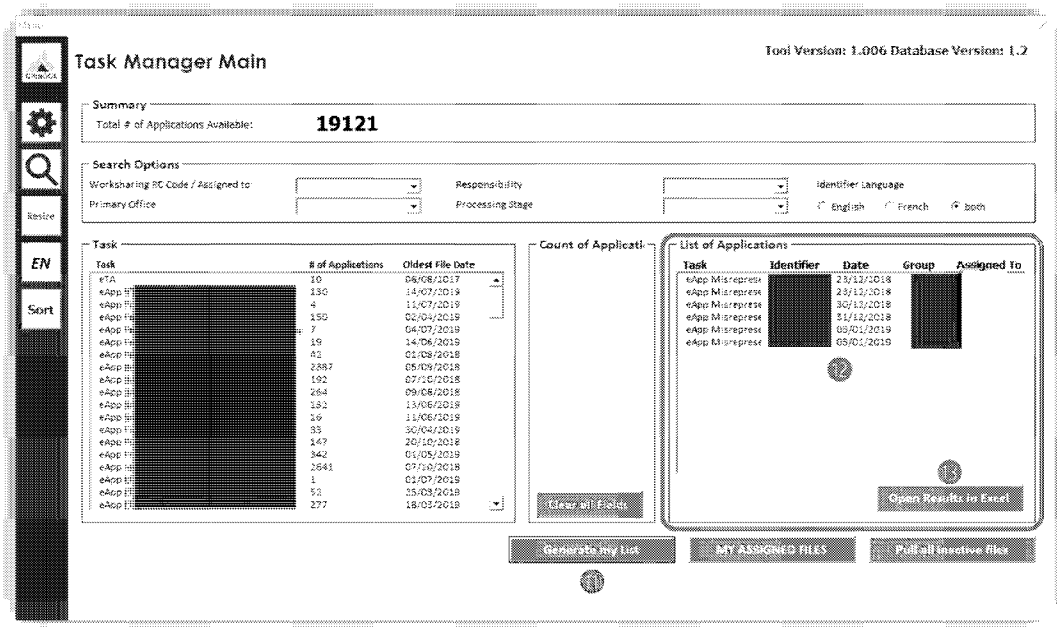


9 **Select your tasks** and the 10 **Number of applications** you want to assign to your **GCMS ID**.
11 **Generate your list**. When a 12 **List of application tasks** appears, 13 **open the results** in Excel.

*** NOTES ***

- If you return back to the 9 **Task**, you will find that the 10 **Assigned applications** have been deducted from the global list on the shelf meaning that other officers cannot tap into your list.
- The activity "**eApps No Match**" contains the files without **group** or some other **missing information.**
- You can perform a 9 **Multiple task selection** to grab files from different eApps.



In the Excel file, you can copy-paste the 14 **e-App Misrepresentation code** in GCMS to finish the work.

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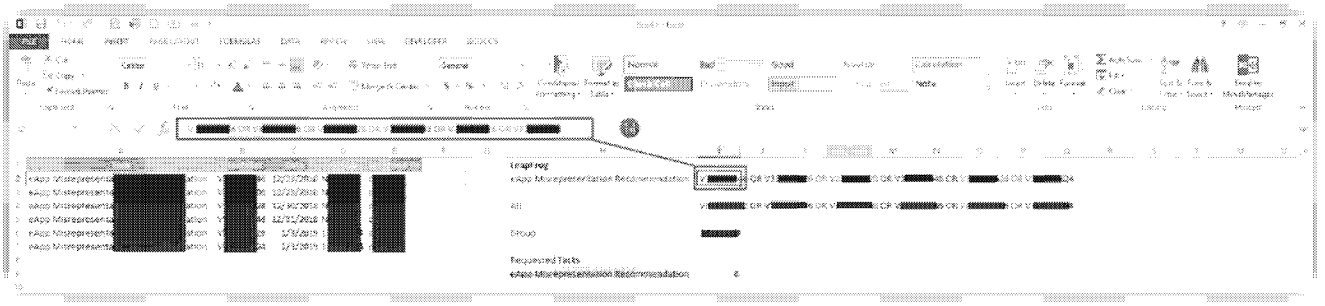


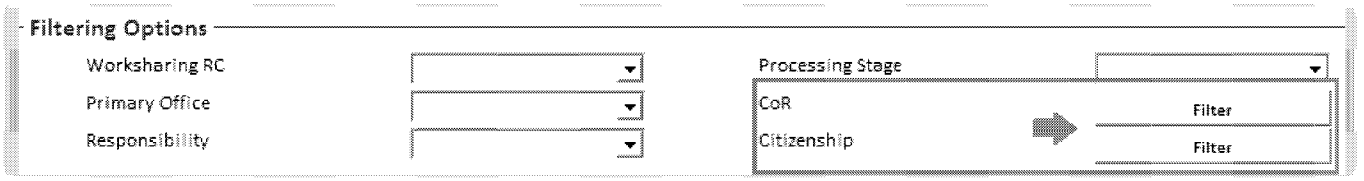
Chinook strings the files for you and you do not have to use any tool to make a query string for applications or groups to perform your queries.

*** IMPORTANT ***

Chinook use the **FIFO** (First-In-First-Out) method to select the applications when you assign them to yourself. The tool assigns the oldest applications first (oldest received data) and if there is an application in a group, the other members of the group will be assigned to your GCMS ID as well (they have to be processed together in other Mods)

NEW FEATURES

Module 1 now includes two new filters for Country of Residence (CoR) or Citizenship.



After selecting **Filter**, you will be able to apply the country filter individually to the activities by clicking on the country name and choosing **Select**.

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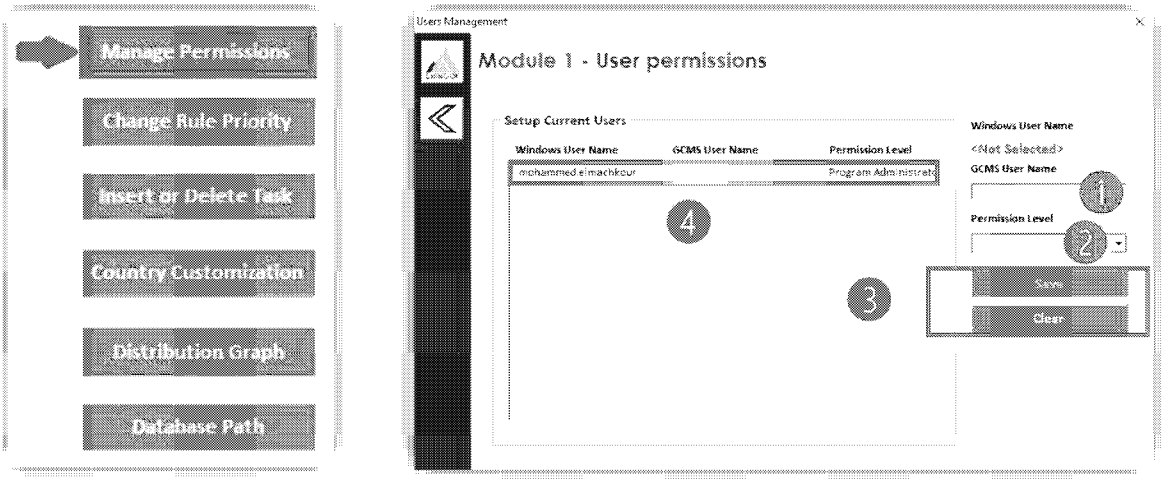
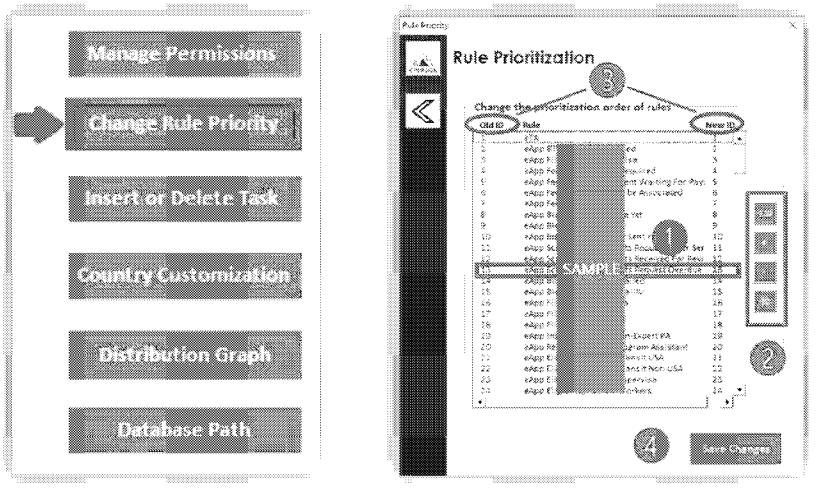
Admin Options

Manage permissions



This section is managed by the local administrator to customize user's profile.
Put the 1 **GCMS user name**, the 2 **Permission level**, then 3 **Save** or 4 **Cancel** your settings.
Anytime, you can check the 5 **Current user's setup**.

Change Rule priority



Select the 1 **Rule you want to prioritize, Jump** by <u>one</u> or by <u>10</u> using the 2 **Rank organizer** buttons.
Check your 3 **Rule prioritization** before you 4 **Save changes**.

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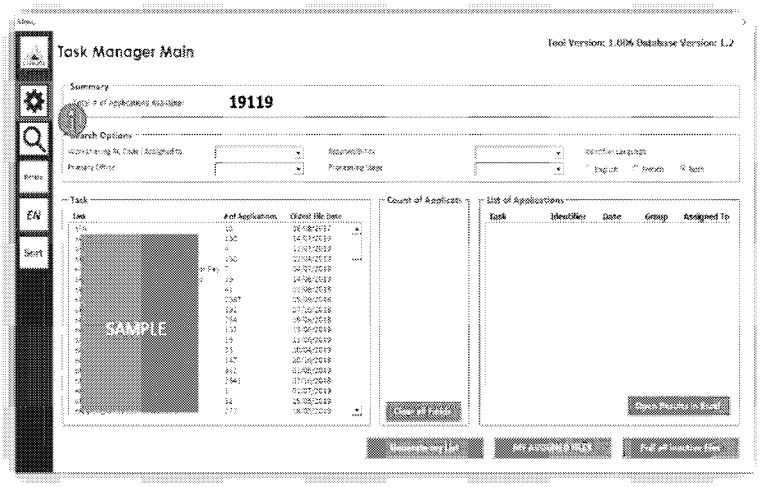
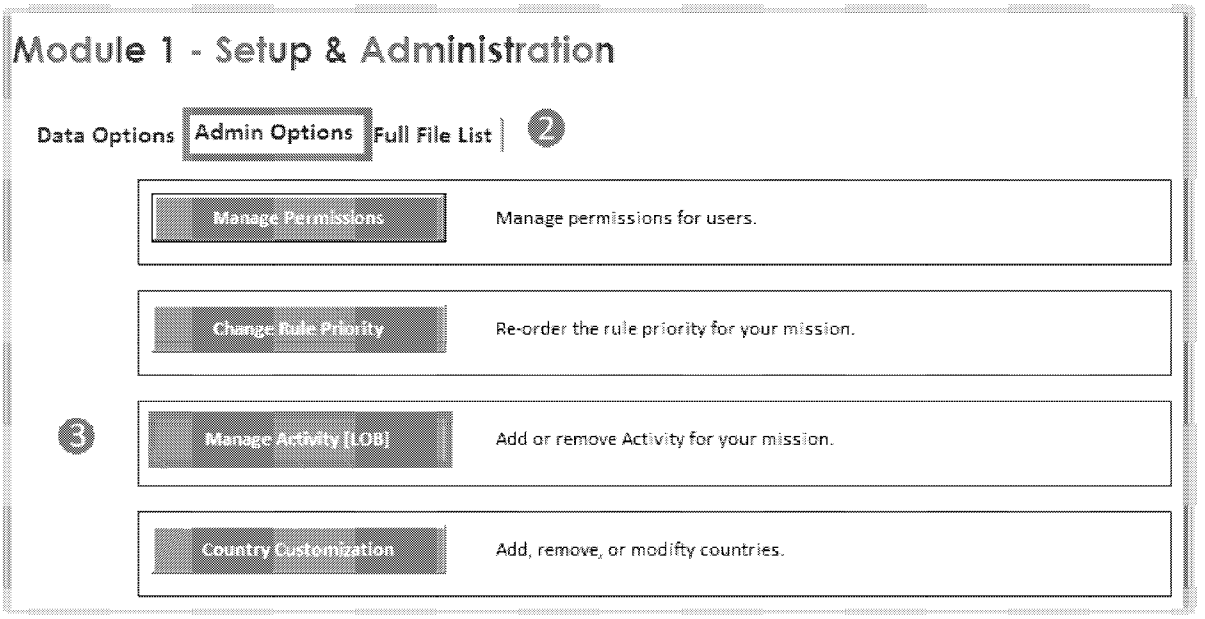
Insert, Disable or Enable an Activity



To **create, disable or enable activities**, click on the 1 **Setup & Administration button**, select 2 **Admin Options** then click on the 3 **Manage Activity [LOB].**



To insert a new activity, navigate to the 4 **Manage Activity tab** and enter the (a) **Responsibility**, (b) **Processing Stage**, (c) **Activity Name**, and (d) and (e) **Activity Description.** (Note: the Activity Description entered will not affect the activity function and can be the same as the Activity Name. Confirm your action by clicking 5 **Insert New Activity** button.

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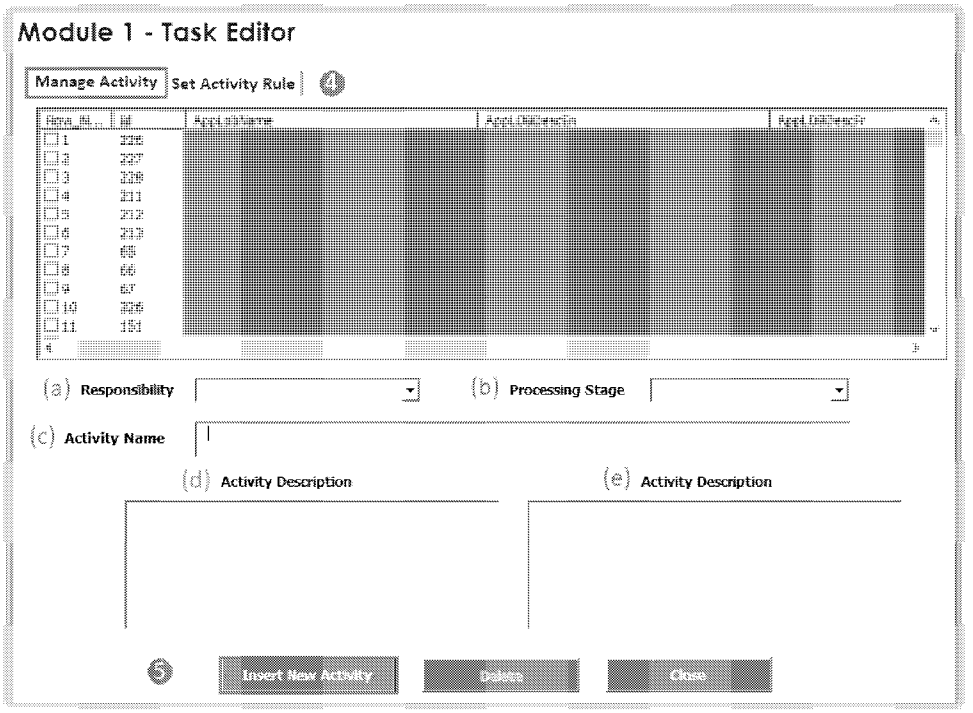
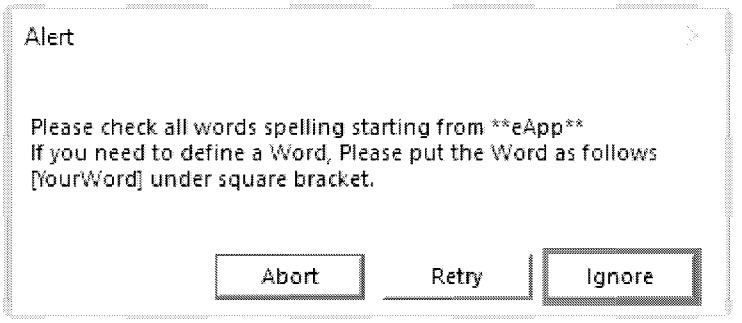


After you insert the new activity, you may receive the following Alert. Select **Ignore** and proceed.



To disable or enable an activity, navigate to the 6 **Set Activity Rule tab.** You can then 7 **Disable** or 8 **Enable** activities**.** Click 9 **Reset Form** if you want to enable all the activities in the right panel.

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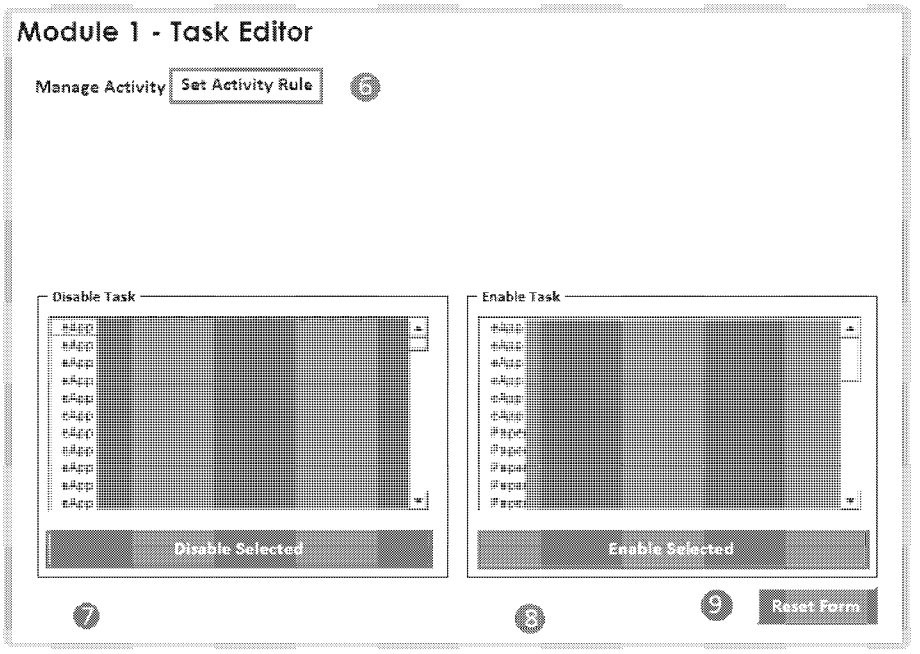
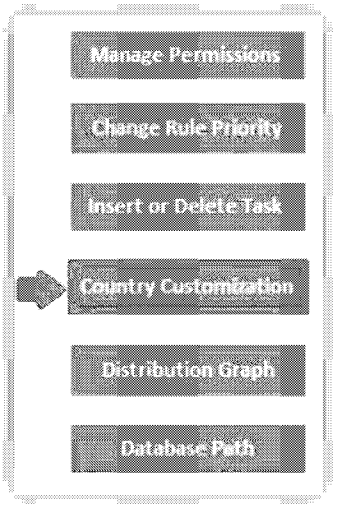
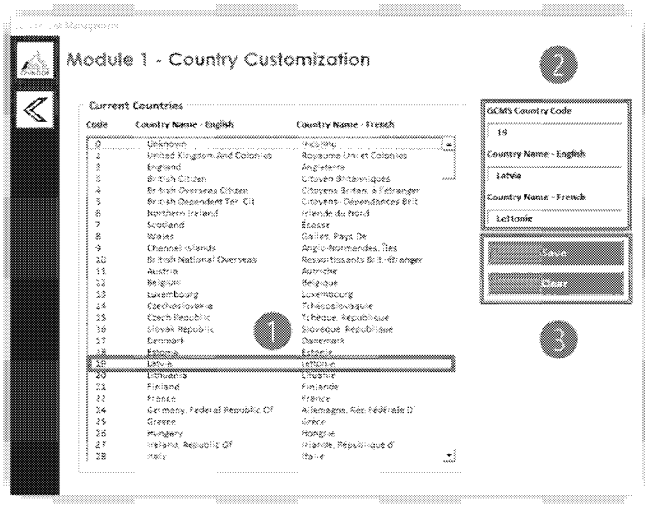


Country customization

To **customize a country** in the list, click on the 1 **Country**, modify 2 **GCMS country code** or the **name** then 3 **Save** or **Clear** to return back to the whole list.





Distribution graph

In this section you can visualize the chart related to your results.

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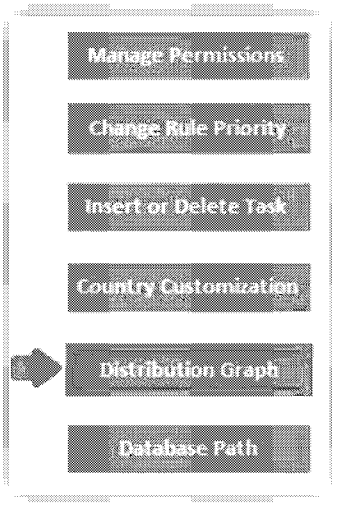
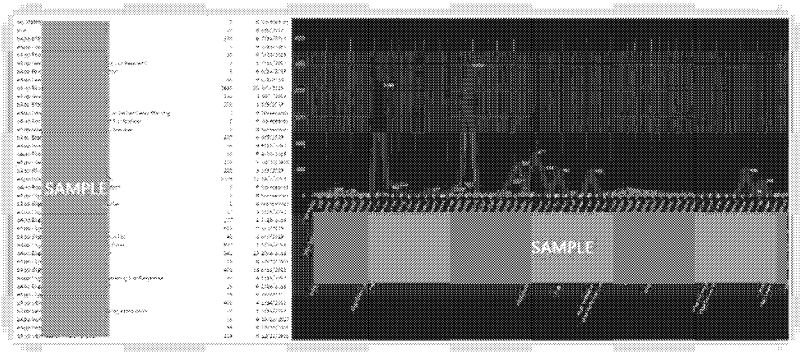
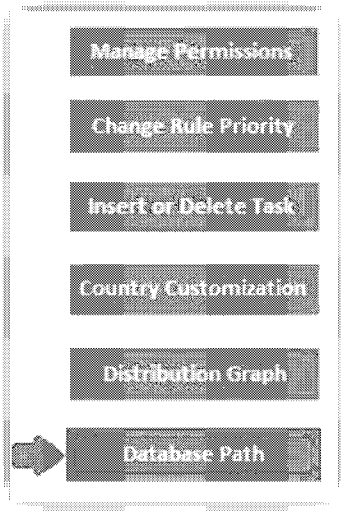
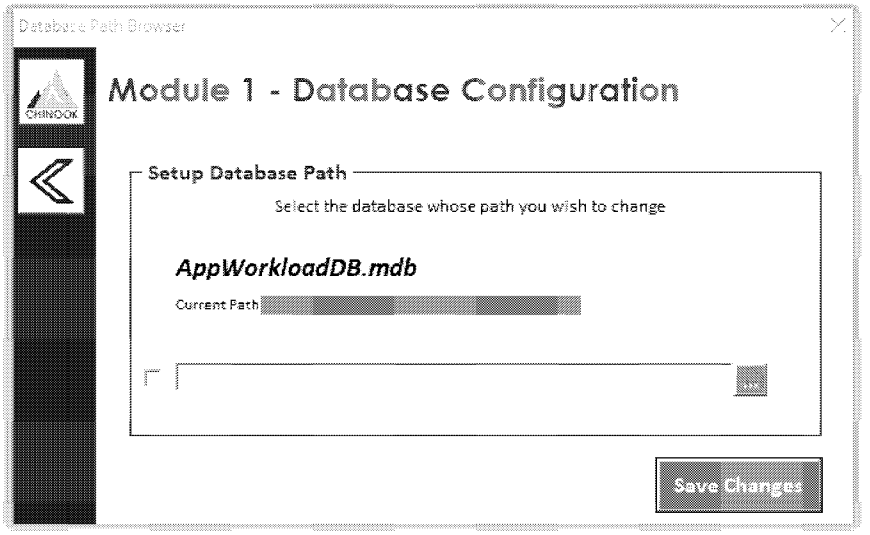




Database path

Lead Chinook to your database and save your changes. For more details, how to perform this setup, visit the section named Initial setup.





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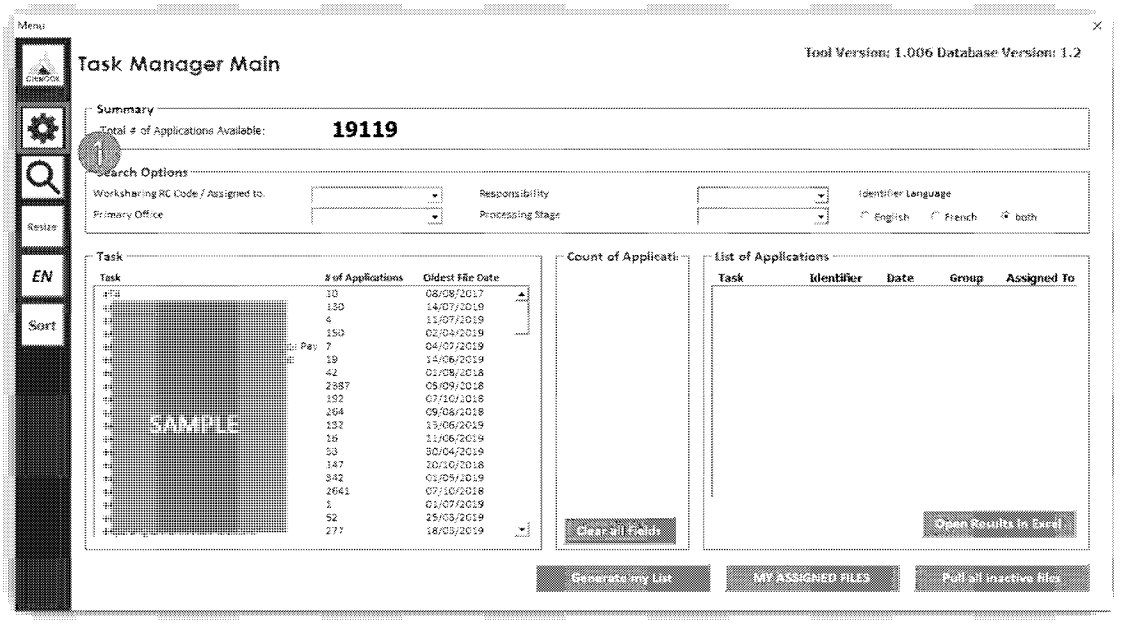
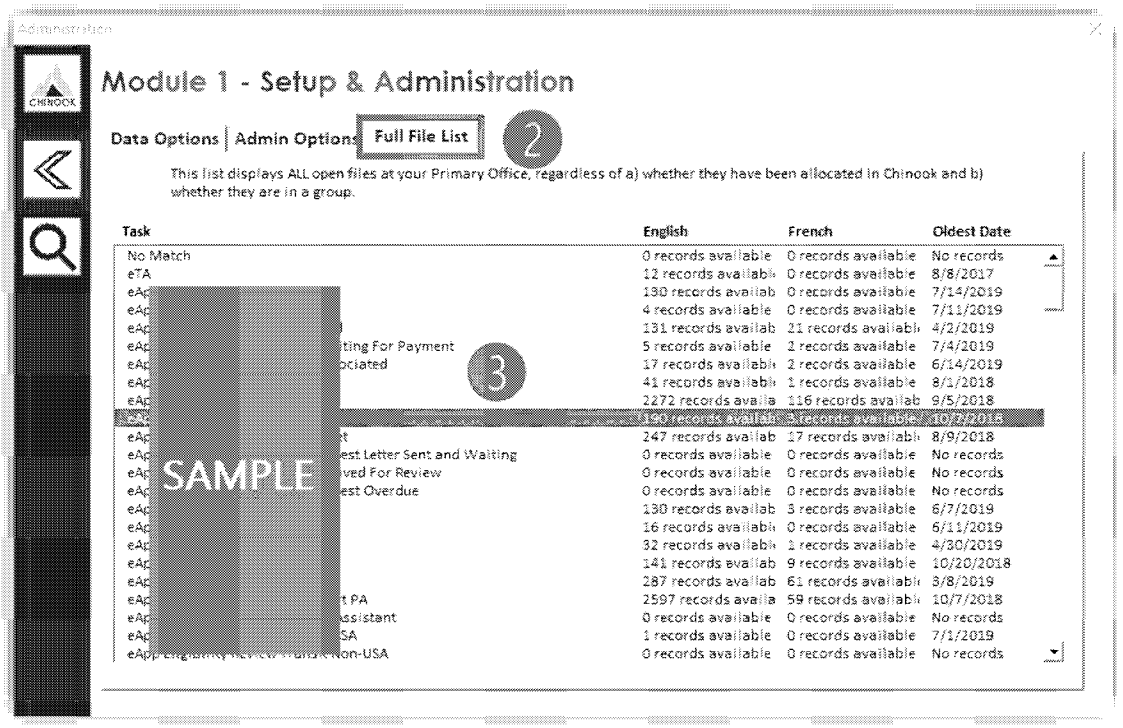
Full File List

Edit Activities & Modify Rules



To edit activities and/or modify rules, Click on the 1 **Setup & Administration button**, select 2 **Full File List** tab then **double click** on the 3 **Task** to edit.



Criteria's can be 4 **Unassigned** or 5 **Assigned** to the rule using the Middle Arrows. You can also 6 **Create a new criteria** or 7 **Edit/Modify** an existing one. Once completed Click 8 **SAVE** Button to save changes and close the window.

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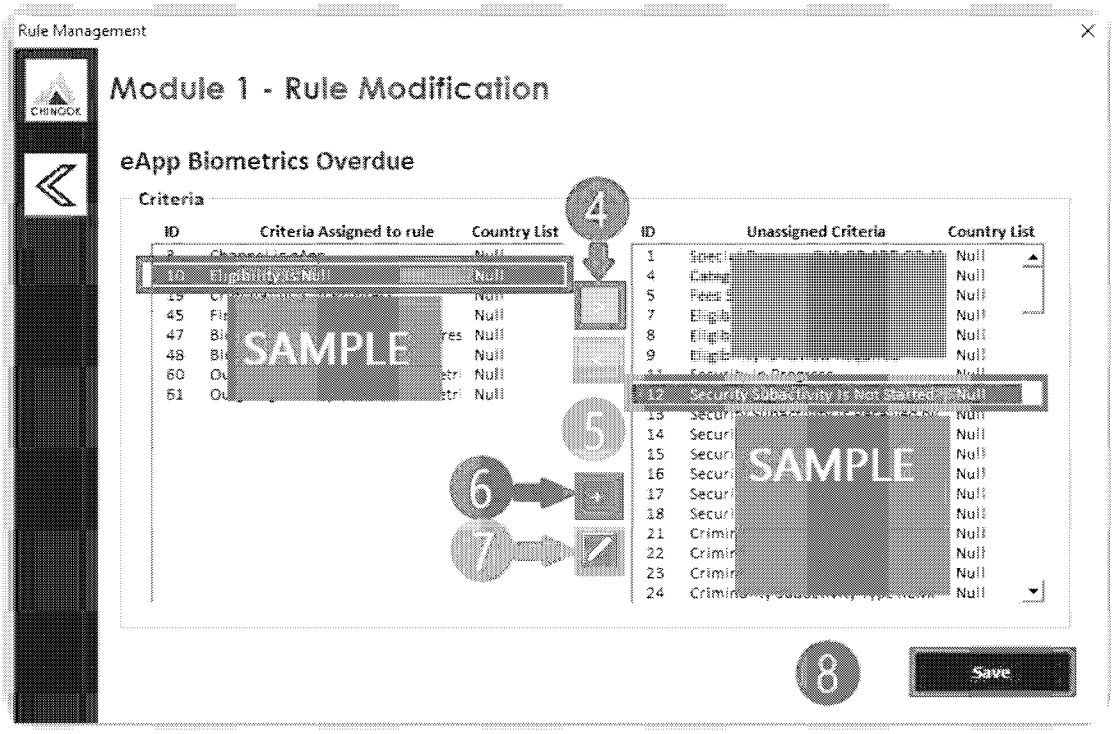
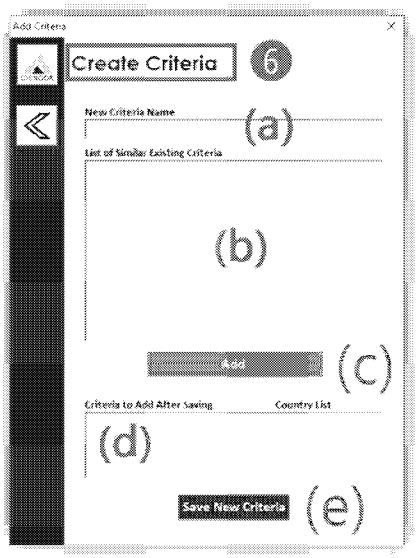
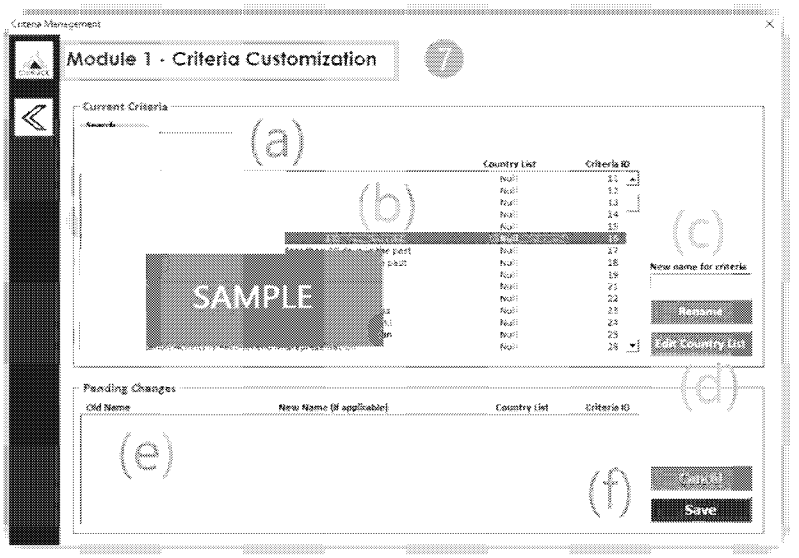


Create / Edit criteria

To ❻ **Create a new criteria,** enter the **(a) New criteria name,** a list of **(b) Similar criteria appears.** Click on **(c)** ADD button to prepare the **(d) List of new criteria's** to be **(e) Saved**.

To ❼ **Edit/Modify** an existing criteria, lookup for **(a) Key word,** select your **(b) criteria** to **(c) Rename** it or **(d) Edit the country list**. Verify your **(e) pending changes** before you **(f) Save** or **Cancel**.





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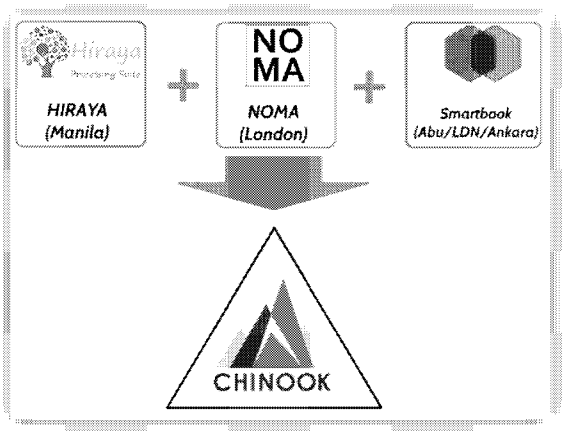
INTRODUCTION

Chinook is a cross-network Temporary Resident (TR) processing suite developed by International Network (IN) – Centralized Network (CN) and Domestic Network (DN), with the support of IT Operations. This modern solution invoked several IRCC talents and stimulated the synergy of the group. The project is managed by (IN) and the tool itself is developed and managed by (CN).

History

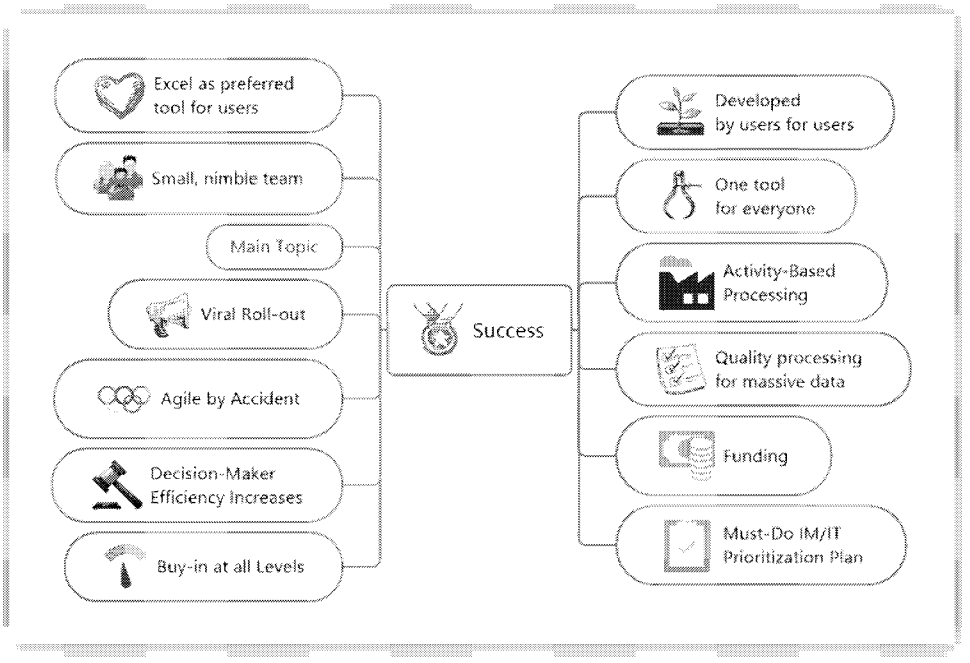


Overall goals

Apart from the time saving and the efficiency that chinook provides, here are the 3 main objectives:

- Replacing various office-specific tools
- Standardizing work sharing procedures
- Streamlining process regardless of processing office

Chinook Success



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Overview / Splash Page

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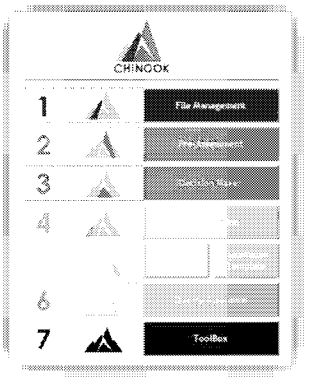
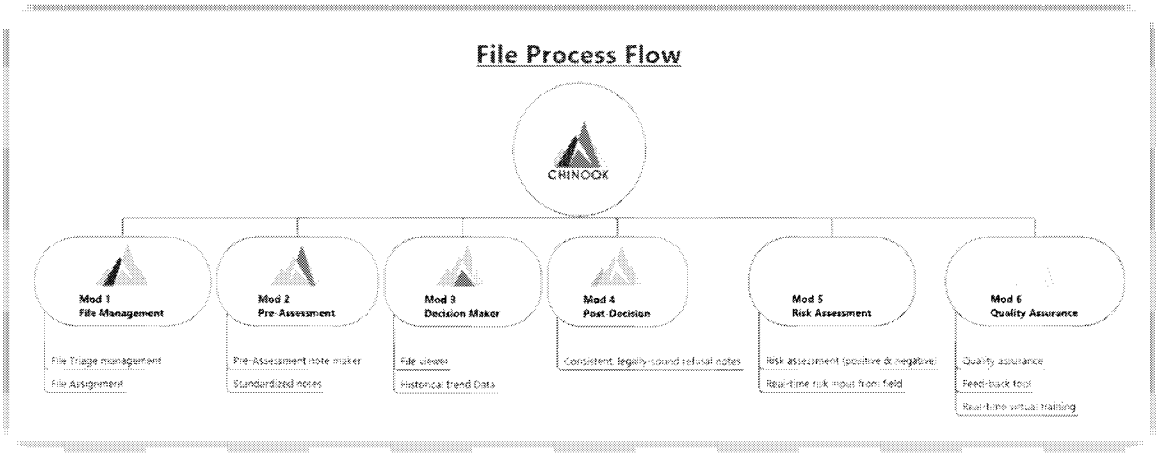


Chinook suite consists of **modules** with an additional **toolbox**. It unifies (**TR**) Process for the Integrated Network (excluding extensions).

File process flow



Launch & documentation

→ Requirements

CHINOOK requires IRCC Professional Laptop or Desktop, Windows & MsExcel up-to-date, your IRCC email and windows password and GCMS account.

→ Privacy statement

By using **Chinook**, the user recognizes having read IRCC rules of ethics and confidentiality in the training module: Protecting and Giving Access to Information at CIC (CC5540). If it is not done yet, we invite you to do it before using **Chinook**.

→ Access request

Chinook project is managed by the business coordinator (IN). The development of the tool is managed by the (CN) experts. For more information about ask your manager.

→ Any comments, suggestions, thoughts or compliments? Please contact: IN Chinook mailbox

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MODULE 2 PRE-ASSESSMENT

The Module2 is focused on value added information promoting **standardization**, **objectivity**, **transparency** and **intelligibility.** This module leads the pre-assessors trough an intuitive process to perform and satisfy clear expectations. Flexibility and customizable is built in through multiple dropdowns that can be filled to meet specific needs for each mission. There are also free text fields to provide maximum flexibility.

1. LINKS BETWEEN MOD#2, GCMS & OTHER MODULES

- From current data pulls for Chinook Mod3
- Mod2 output to GCMS must be via *Pre-Assessment Notes* field (previously was via *Travel itinerary* and this practice has been discontinued in March 2020)
- Mod3 already pulls *Pre-Assessment Notes* field
    - Delay of up to 12 hours for the data to be included in the next Mod3 data pull

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2. MODULE 2 SETUP

2.1 Ensuring the link via works

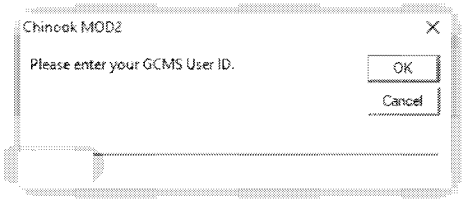
If you have a previous version of Mod2, you need to do following steps first to ensure the link via the works:

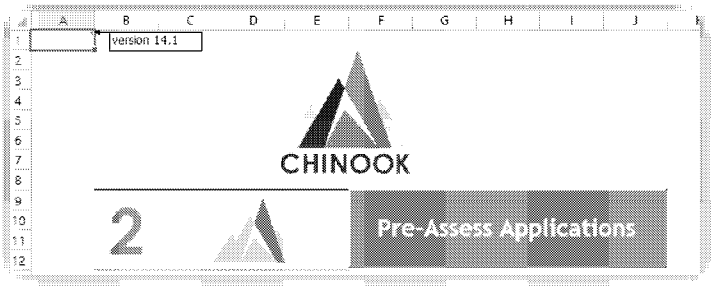
1. Go back to your **MOD2 folder**
2. Rename your old file "**Chinook – Mod2**" to "**Chinook – Mod2** v.x.x.x"
3. Rename your "**Chinook – Mod2_new version**" to "**Chinook – Mod2**" to keep the same original name of the Module2
4. Doing so, we ensure your **Chinook** will call the right file and refer to the new version
5. Right click on the new version (actually named "**Chinook – Mod2**''), and select "**Properties**" then customize to "**Read only**".

2.2 How to set up Chinook Mod2?

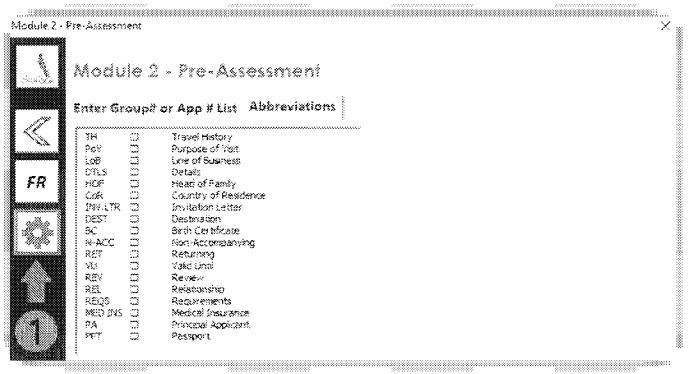
To set up Chinook Mod2, the first user will follow following steps:

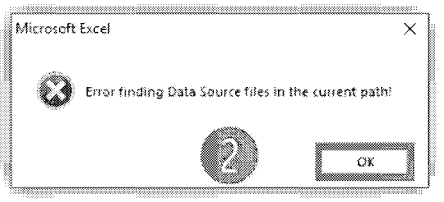
1. Go to Here GCDocs Chinook Mod2 folder and download the latest version
2. Place the downloaded file under **your MOD2 folder** (your previous version location)
3. Rename the new version "Chinook – Mod 2" (or what makes sense for your office) AND follow the instructions to ensure the link via the works as detailed above
4. Open the document and click on "**Pre-Assess Applications**"
5. As first user, you will need to provide your **GCMS ID**. By default, the first user is granted Admin privileges.





6. Click the (1) **Wheel button**. You will have to skip an error (2) **Message.** The setup is composed of three different tabs (see Picture 02 below)





7. Select your region and folder where all your Chinook data is stored (see Picture 02)

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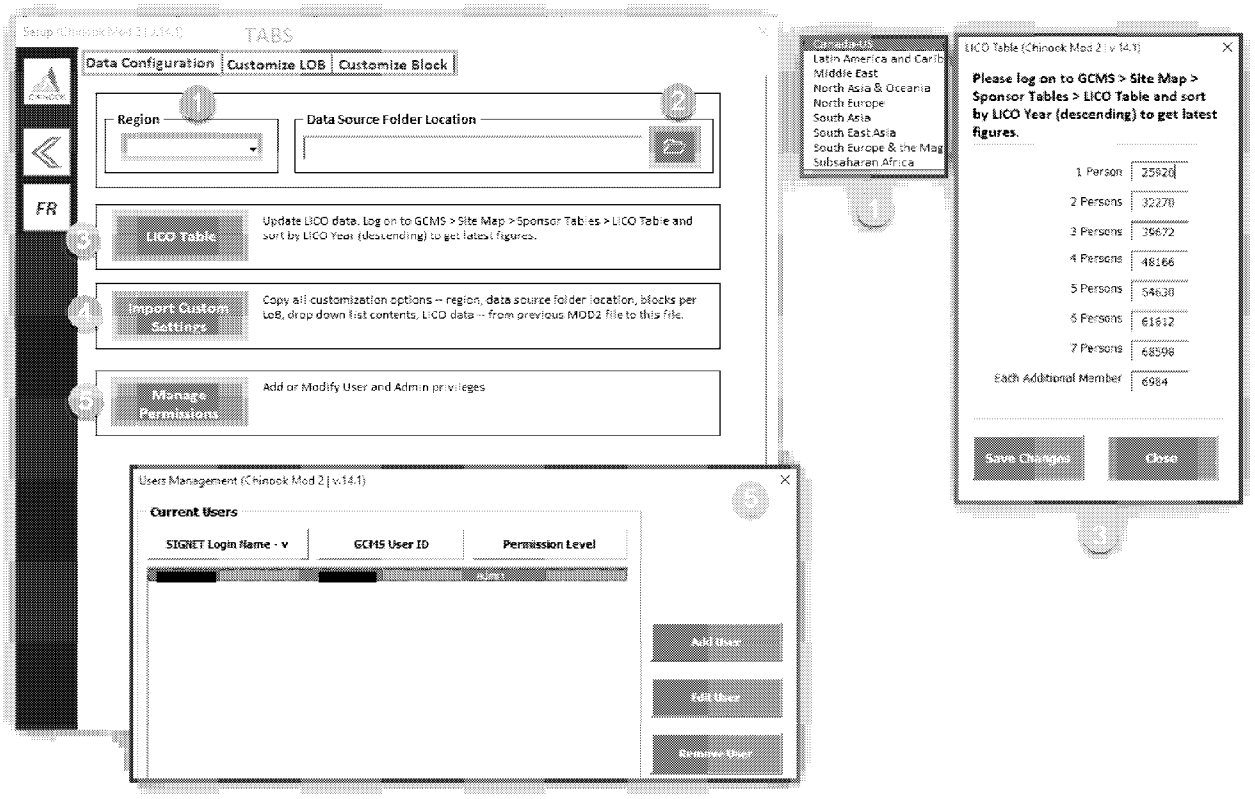
8. Save and close the document.

If you are installing the pre-assessment module for the first time at your office, it is suggested that you re-open Mod2 and start customizing the pre-assessment settings. Customization functions will be covered in details in Section 2.2 below.

2.3 How to Update a Version & Import Custom Settings?

1. Click on 4 **Import Custom Settings** button and browse to select your "**Chinook – Mod2_old version**"
2. Ignore the "**Warning** " message and Click "**Yes**" to continue when "**Importing Custom Setting**" is done. Select your 1 **Region** and the 2 **Data source** location in your **{I} drive**
3. Exit from the setting windows and the pre-assessment window. Now you can **Save the Excel document** and **close it**
4. Open **Chinook** click on "**MOD2# Pre-Assessment**" and make sure you work with **the latest version.**



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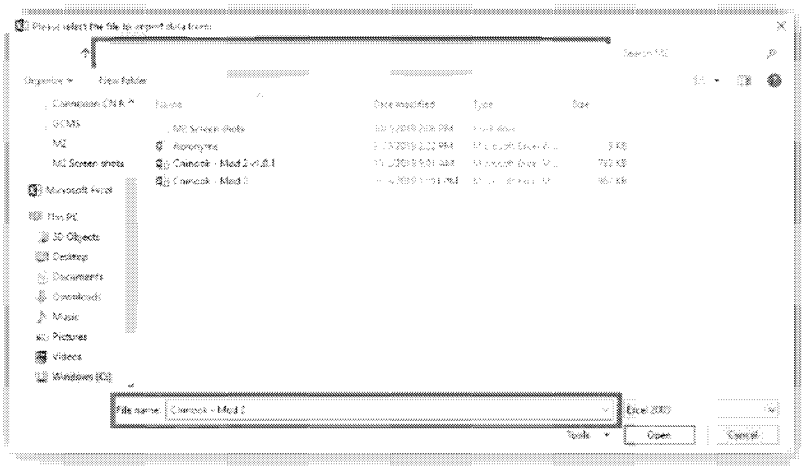

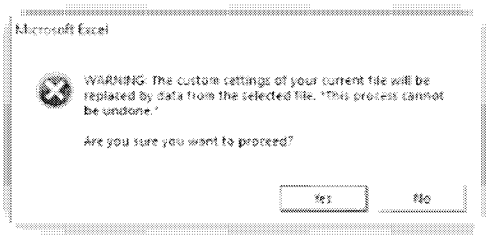

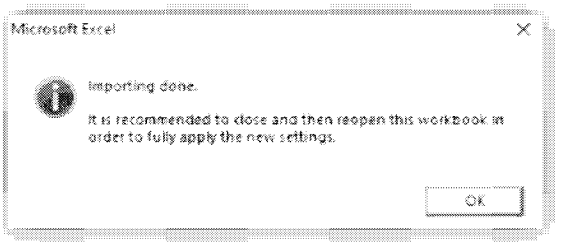

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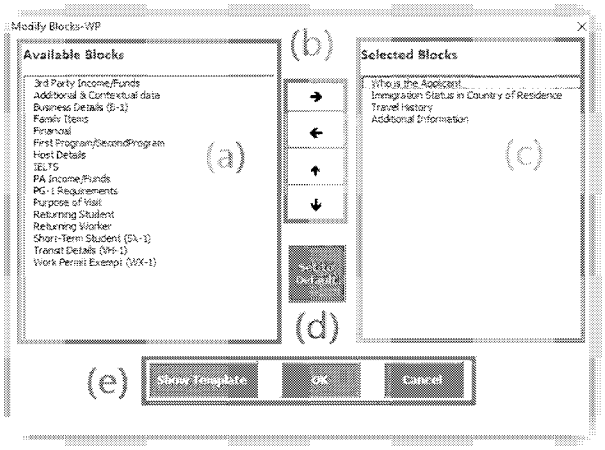
3.3 Customization: Line of Businesses

The current Chinook version manages **11 Lines of businesses (LoBs)**. An application is automatically associated with one LoB based on available GCMS information via **Application Category** & **Counterfoil Category fields.** The **CUS LoB** uses a special program field. Each of the 11 LoBs are customizable to the level of pre-assessment your office requires for its specific caseloads. There are two action buttons, either to (1) **Assign** or (2) **Preview** the blocks.

3.4 Assign Blocks

Select a Block from the (a) Available list and click the correct arrow to (b) Add, Remove (from) or Rank it in the (c) Selected Blocks. You may want to (d) Set to default then (e) **Accept** or **Cancel** your changes. Anytime, you can click Show Template button to display the result.



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3.5 Preview Blocks

A block means a group of fields that can be subdivided into sub-blocks. A block is composed of fields (free text, checkboxes or dropdown lists) to lead you through an intuitive pre-assessment process.

Mod2 contains **31** different blocks. While some are specifically applicable to one LoB, others are generic and applicable to many.

Example: "**Family in Canada**" block is intended for SPs, but can be useful for any LoBs.

3.6 Customization: Blocks

The current working version has **31 blocks**. Each one contains a (A) **Block name**, a (B) **Preview** button, and may have also (C) **Customizable items.** There are 17 customizable blocks having a total of 37 customizable items.

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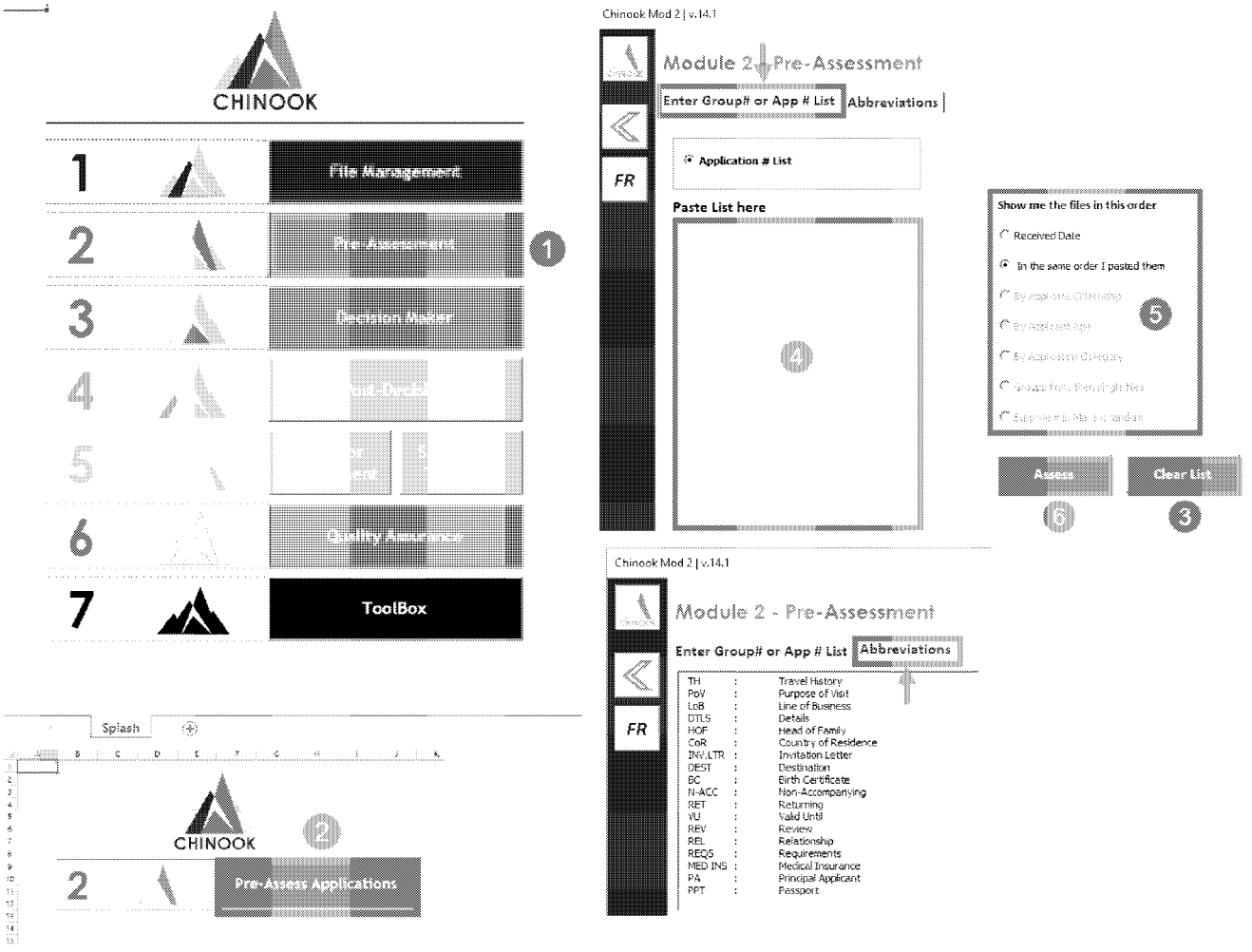
4 START PRE-ASSESSING

4.1 How to start pre-assessing

From the Splash-page, click on (1) **"Pre-Assessment"** -> (2) **"Pre-Assess Applications"**, then a window with two tabs will pop up.



4.2 Abbreviations Tab

This tab is where you can find a list of most abbreviations that are used in the tool. Limited to 1000 characters, abbreviations in Chinook are balanced between full words, first letters and abbreviations. Below are the main abbreviations:

- **BC** : Birth Certificate
- **CoR** : Country of Residence
- **DEST.** : Destination
- **DTLS** : Details
- **HOF** : Head of Family
- **IELTS** : International English Language Testing System
- **INV. LTR** : Invitation Letter
- **LICO** : Low Income Cut-Off
- **LoB** : Line of Business
- **MED INS.** : Medical Insurance

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- **N-ACC** : Non-Accompanying
- **PA** : Principal Applicant
- **PoV** : Purpose of Visit
- **PPT** : Passport
- **REL.** : Relationship
- **REQS** : Requirements
- **RET.** : Returning
- **REV.** : Review
- **TH** : Travel history
- **VU** : Valid Until

4.3 Enter Group# or App# List Tab:

This tab is where users can copy and paste their application list. Up to 25 application numbers can be pasted at a time. To start pre-assessing, ③ **Clear** the existing list or **Paste** your Application list in the ④ **free field,** then specify if you want to show up the files ⑤ **by received date** or **by the order** you pasted them before clicking ⑥ **Assess** button.

Note that current, only application numbers can be pasted in. (Group# will not work)

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4.4 Pre-assessment block & Notes

4.5 Pre-assessment blocks

The first section 1 of the pre-assessment viewport is automatically filled with contextual data. This comes from the Mod3 data pull and would not appear if you are using Mod2 as a standalone tool. (as in example above) Only "**Override Category**" field can be modified by pre-assessors by selecting a new LoB in the dropdown, 3[1].

The second section 2 is the pre-assessment section which is based on **Common** and **specific blocks** depending on the specific 3 **LOB** and your mission's customizations. The pre-assessment process is filling in all blocks in the pre-assessment viewport with information from either paper or electronic files.

No extra data pull: No extra data pull is required to use the pre-assessment module. To maximize its efficiency, it is recommended to at least maintain data used by Mod3 up-to-date. Mod2 uses some of Mod3 data to populate the contextual display's information and to determine if a pre-assessment block is relevant or not based on specific customization.

Mod2 does not talk to GCMS. Users have to use Mod2 alongside with GCMS.

[1] In addition of being essential when the tool is used as a standalone, this is useful in situations such as when a CUS case is not pre-identified or a returning student using V-1 coding instead of S-1 or any other situations in which the data on file does not prompt appropriate LoB blocks for pre-assessment.

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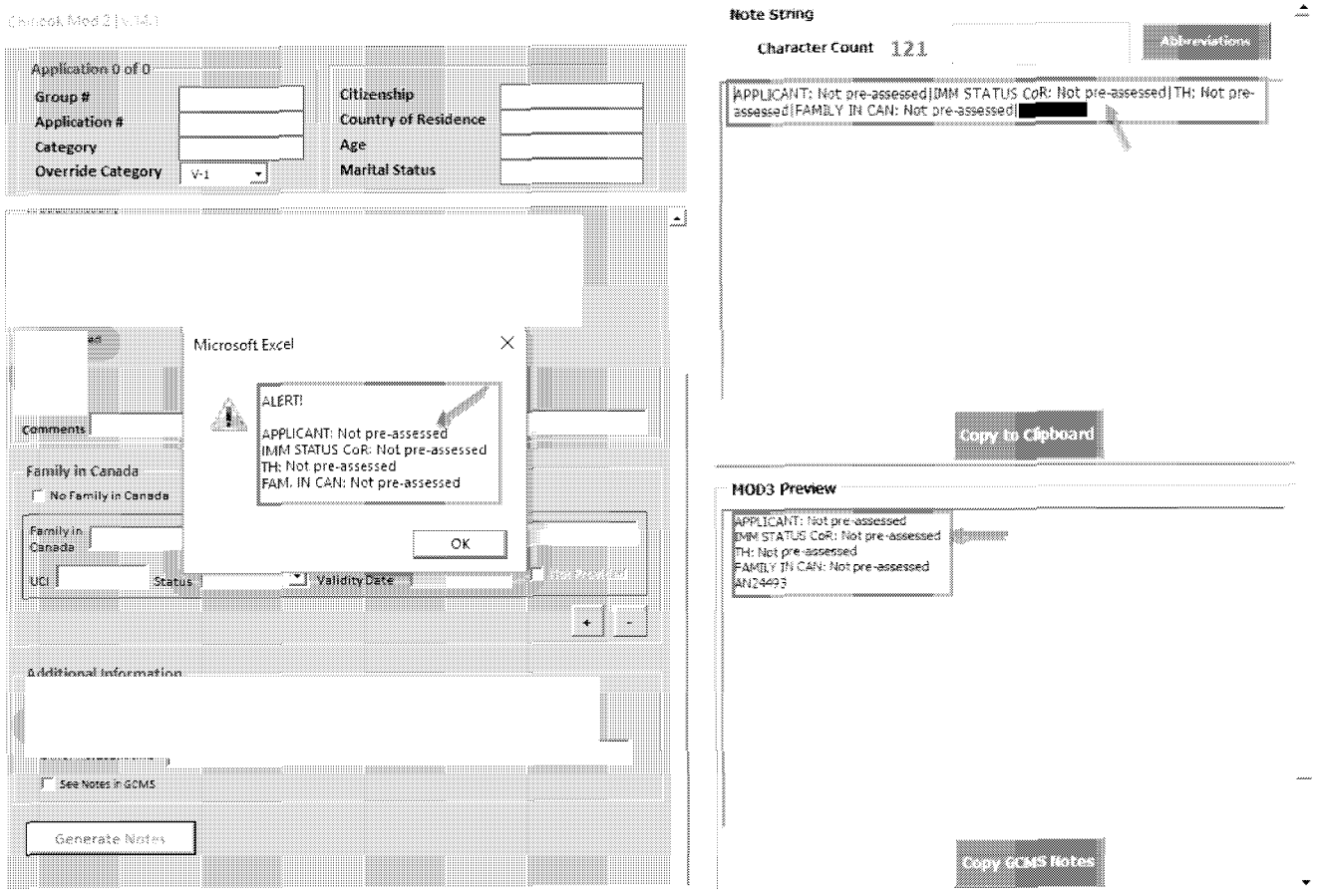
4.6 Generate Notes

After **Generate Notes** button is clicked, the blocks will turn into a darker grey color, which helps quickly distinguish completed blocks from incomplete ones. To continue modifying blocks' contents, pre-assessors can always close the "**Pre-Assessment Notes**" window (see Picture 04), make necessary modification(s), and click "**Generate Notes**" again when ready.

If a block was entirely left blank, an alert message will appear after clicking the "**Generate Notes**" button. Also, if a field is left blank in a block, it will be indicated as "*Not Pre-assessed*" in the notes. In these cases, pre-assessors need to go back to the pre-assessment window and complete all the blocks before carrying on next steps.



4.7 Note String vs MOD3 Preview

After clicking the "**Generate Notes"** button, pre-assessment notes are displayed in two ways that are both editable. The 1 **Note String** (see Picture 04) is to be copied into the "**Pre-Assessment Notes"** filed in GCMS (see Picture 01). This part contains pipes that are used to tell Module 3 how to display the note. Each pipe is translated by MOD3 as an indicator to start a new line. The 2 **MOD3 Preview** is how the note will be displayed in MOD3. If the note is over 1000 characters, the *Pre-Assessment Notes* field in GCMS will cut the note at 1000 characters. Therefore, users should use the *MOD3 Preview* note should be copied into GCMS Notes. The best practice would be to mention "*See GCMS Notes*" in the "**Pre-Assessment Notes**" field, so the decision maker knows the pre-assessment has been completed and is available in the GCMS Notes.

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5.1.2 Immigration Status in Country of Residence

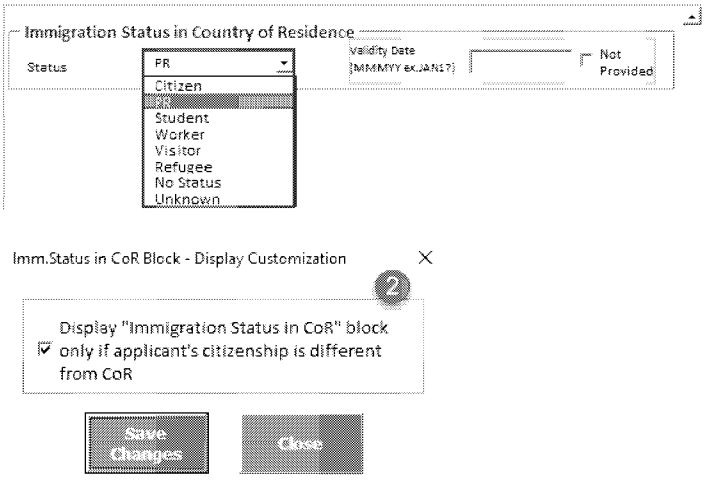
Purpose: to provide details regarding third country national applicants' immigration status and immigration documents' validity.

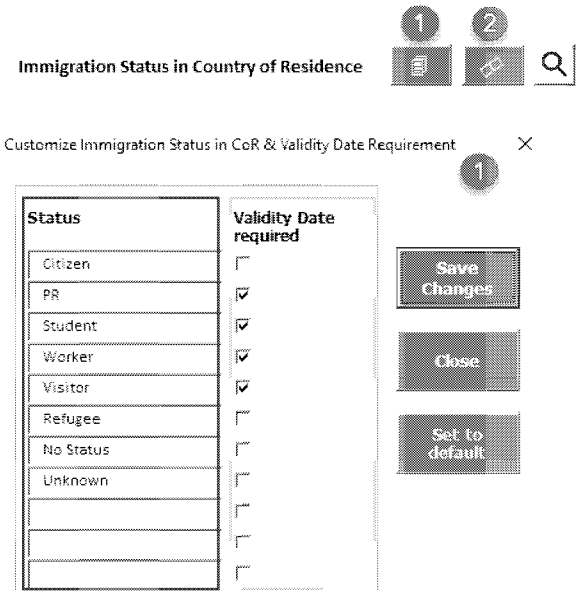
LoB Defaults: This block is set as default for all 11 LoBs.

Customization(s):

1. By default, this block is only displayed to users if an applicant's country of residence (CoR) is different from his/her country of birth (CoB). Admin users can change the setting by unchecking ❷ **Display Customization** box.
2. ❶ **Customize** list can contain up to 25 choices in total. The "**Validity date**" field is prompted only for the status options where the "**Validity date Required**" is checked

Tip → To add an extra level of information, you can create sub-categories, for example, expanding PR to PR-FC1, PR-FC2, PR-E, etc.





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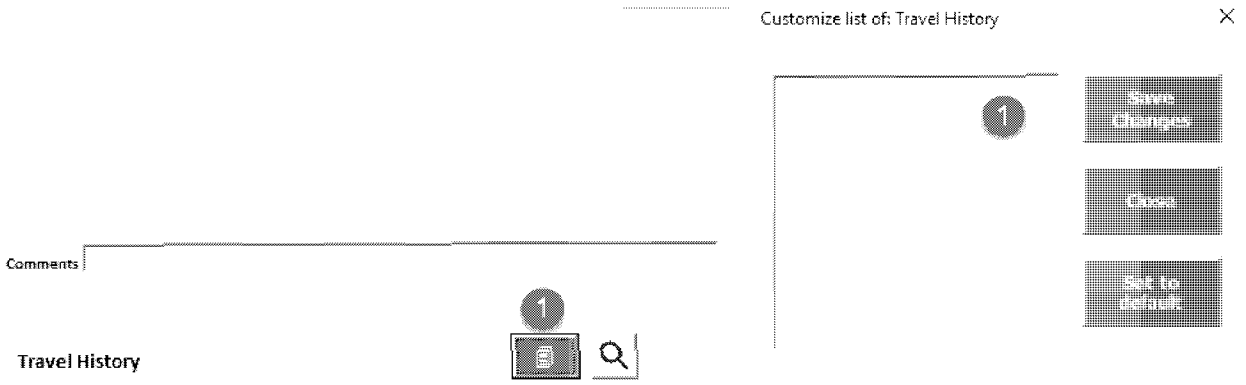
s.16(2)(c)

5.1.3



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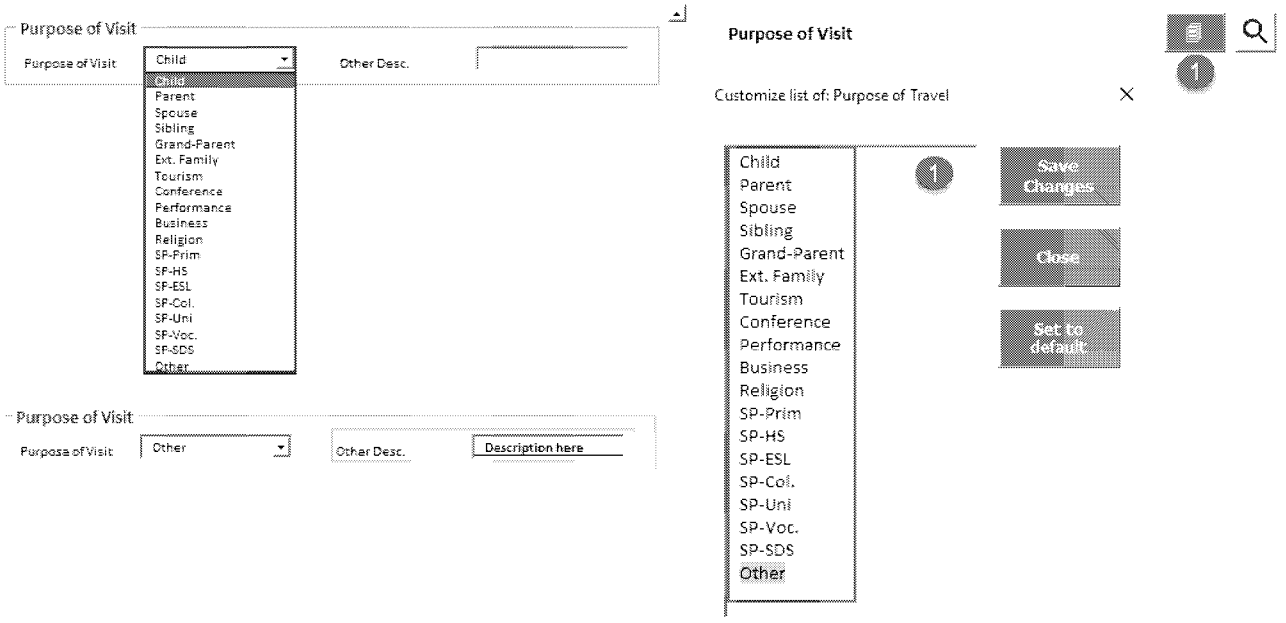
5.1.4 Purpose of Visit

Purpose: to provide information regarding an applicant's purpose of visit in Canada. The "**Other Desc.**" field turns from grey to white if "**Other**" is selected to prompt user to give more information

LoB Defaults: Applicable to most LoBs.

Customization(s): 1 **Customize list** can contain up to 25 choices. The "**Other**" option is mandatory as it is linked to the "**Other Desc.**" field.

Tip → Create sub-categories choices if a higher level of details would be useful to the decision makers in your office, for instance, specific levels of study for SP applications.



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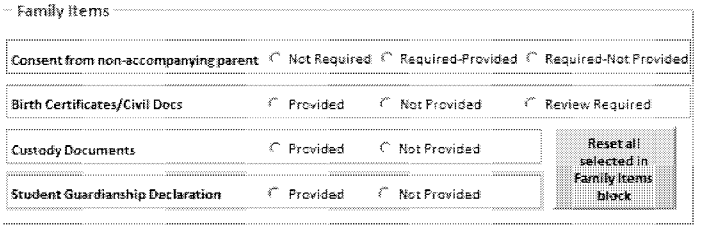
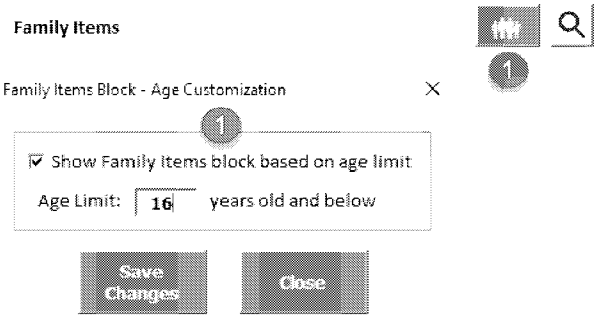
5.1.5 Family Items

Purpose: to cover possible requirements associated with minor travelling to Canada. This block is non-mandatory. As not all situations would require the information presented in the block to be pre-assessed, it will not generate an alert message when left blank. Instructions should be provided to ensure the information is pre-assessed when warranted. "**Student Guardianship Declaration**" block is specific and made available only for minor SP applications.

LoB Defaults: Applicable to some LoBs.

Customization(s): By default, for the LoBs in which the block is assigned, the "**Family Items**" will be prompted for pre-assessment only based on the age limit of 16 and below. You can un-check the box for the block to always be prompted regardless of the age, and you can set a different age limit.





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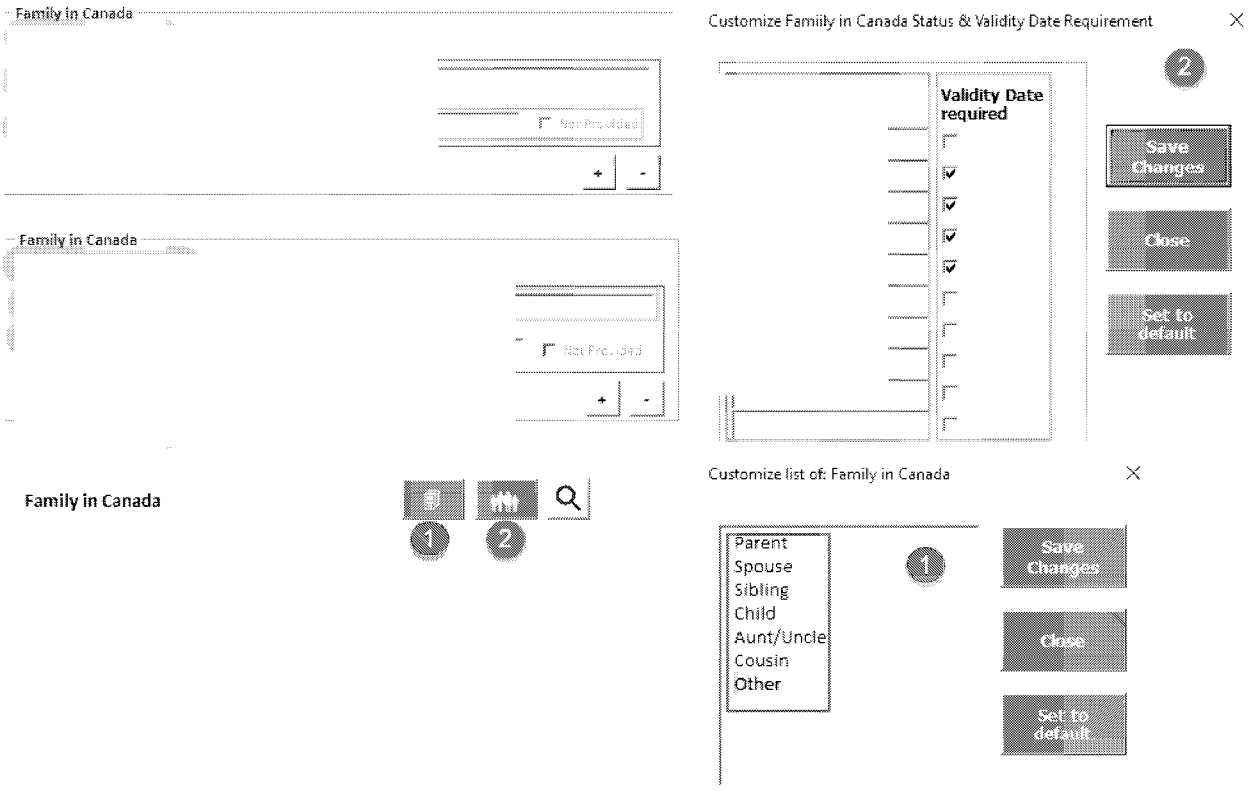
5.1.6 Family in Canada

Purpose:

LoB Defaults: Applicable to some LoBs.

Customization(s): Two fields are customizable. 1 **Customize list of Family in Canada** can contain up to 24 choices in addition to the mandatory "**Other**" field that is used to trigger the "**Other Desc.**" text box. In 2, "**Family UCI Status**" is also customizable with up to 25 choices, and for each choice, you can determine whether or not "**Validity Date**" should be pre-assessed.



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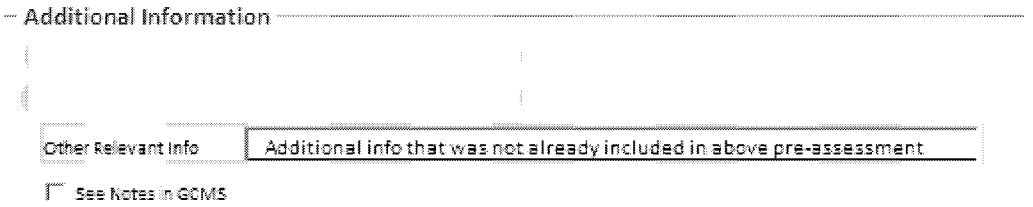
5.1.8 Additional Information

Purpose: This block is non-mandatory. When left blank, no alert message will appear and no "*Not pre-assessed*" remark will appear in the notes. The "**Other Relevant Info**" field is an ultimate flexibility and

LoB Defaults: Applicable to all LoBs.

Customization(s): No customization options are available for this block.



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5.2 FINACIAL BLOCKS

Six different financial blocks are included in MOD2, offering flexibility for ways that income and savings are pre-assessed. LoBs currently include up to three financial blocks to complete their financial pre-assessment. Offices can scale it up or down depending on their specific needs.

5.2.1 PA Income/Funds

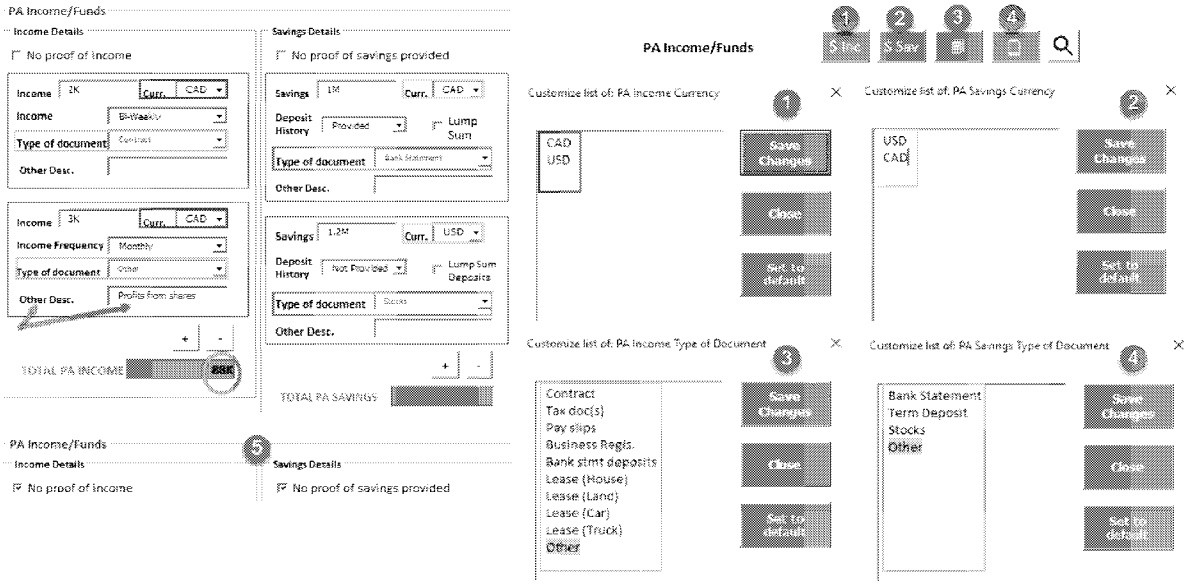
IMPORTANT This block has been renamed in a previous version. When importing your previous customization into the new version, make sure you double check the imported blocks and replace the block listed with the old name with the updated one. Not doing so will cause the block not to be prompted for pre-assessment at all.

Purpose: to provide information about an applicants' Income and Savings.
There are two main sub-blocks, "**Income Details**" and "**Saving Details,**" that work independently. If "**No proof of income provided**" or "**No proof of savings provided**" is checked, the associated sub-block turns grey. If both boxes are checked, the whole block will collapse (5).

While different income/savings sources can be added, it is a good practice to provide guidance on what is the most relevant information and details levels required for decision-making. In order to save on characters and/or to make the notes easier to read, users can use "K" for thousand and "M" for million[2].

For "**Type of document**" fields: "**Other**" option is mandatory and unlock the "**Other Desc.**" field when selected. Pre-assessors should then provide a short description of the document.
For "**Total**" fields: If there is more than one entry and if all the entries are in the same currency, this field will be displayed. In all cases, the individual entries are included in the notes matching with what was input by the pre-assessor.

Customization(s): Four dropdowns are customizable. Currency lists, 1 and 2, can include up to 25 options. Type of document lists, 3 and 4, can include up to 24 options. "Other" option is mandatory as it is linked to "**Other Desc.**" field.



[2] Although "G" for billion is not functional at the moment, it may become available in a future version.

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5.2.2

Purpose: [1]

3rd Party Income/Funds

Relationship to PA

☑ No 3rd Party

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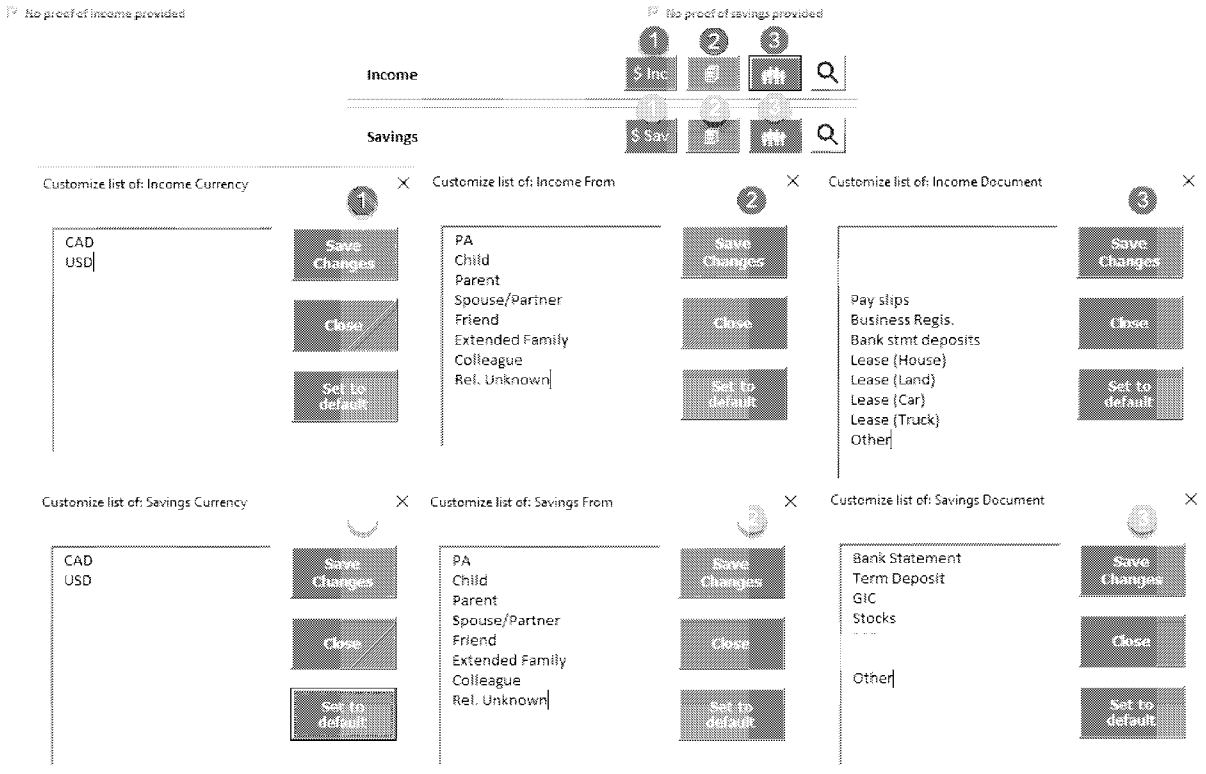
5.2.4 Income and Savings

Purpose: Two additional blocks have been created to increase the flexibility in financial pre-assessment. These two blocks maybe better to use for certain LoBs or offices may prefer using these blocks than a combination of the previous 3 blocks in a), b), and c).

If "**No proof of income provided**" or "**No proof of savings provided**" checkbox is checked, the respective blocks will then collapse.

Customization(s): Lists of Income/Savings Currency, Income/Savings From, and Income/Savings Document are customizable with up to 25 choices for each list.



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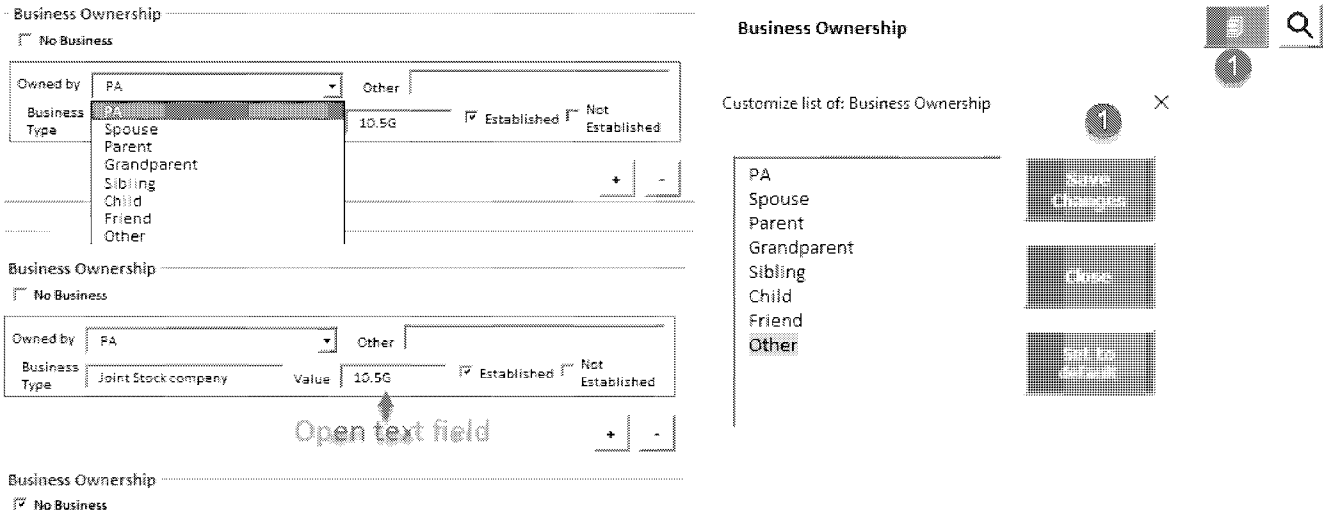
5.2.5 Business Ownership

Purpose: This is more of a "niche" block that is useful in countries where self-employment and business ownership is common. It is not intended to replace the income blocks for pre-assessment of income from a business source, but to cover extra information that would otherwise not be.

Customization(s): Only "**Owned by**" dropdown list is customizable with up to 24 choices as the "**Other**" option is mandatory for the "**Other Description**" field to be prompted.



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5.3 LINE OF BUSINESS - SPECIFIC BLOCKS

All seven pre-assessment blocks presented in this section are not customizable and specifically applicable to one LoB.

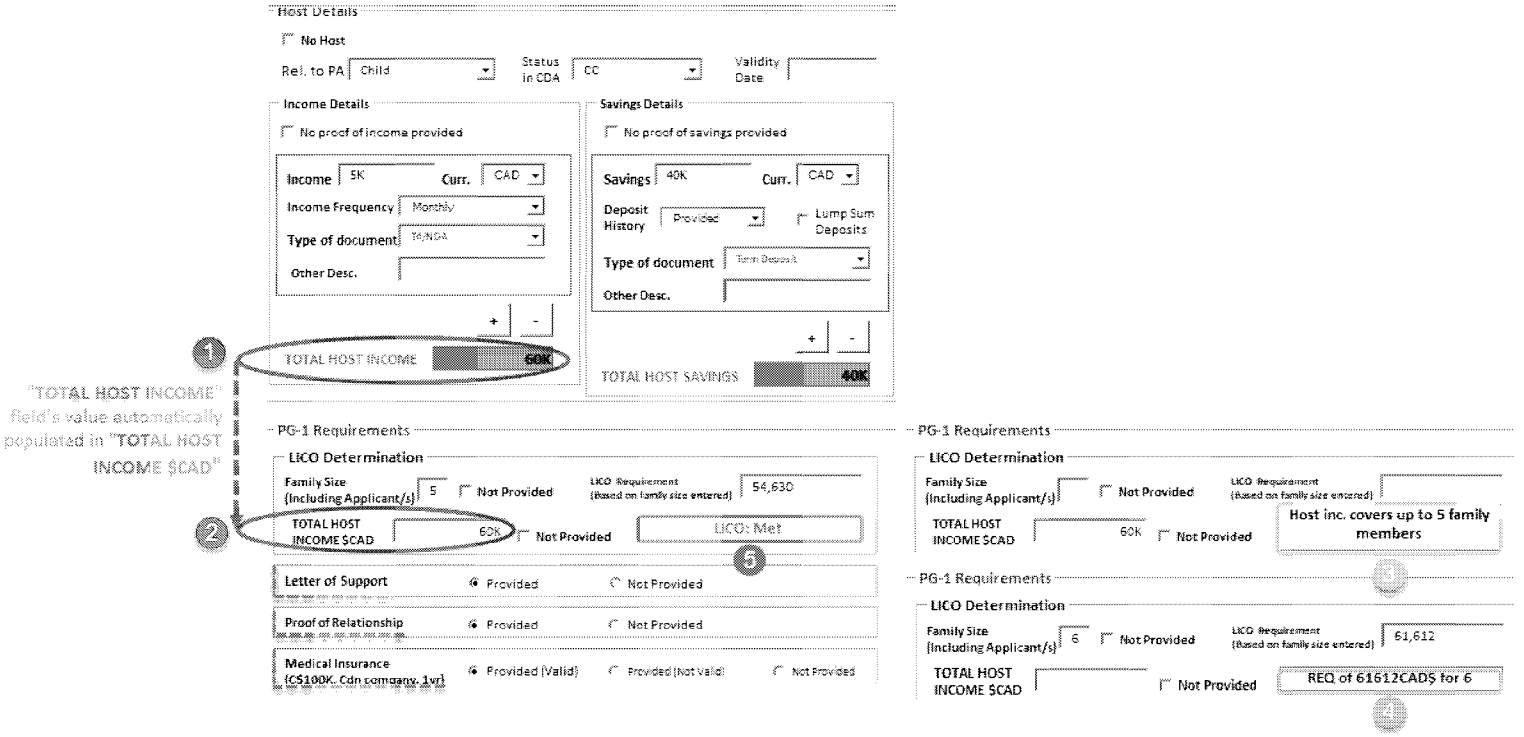
5.3.1 PG-1 Requirements

Purpose: This block works best when paired with the "**Host Details**" block as **WHEN** the value of ① **TOTAL HOST INCOME** field is in CAD$, it will then be automatically populated in ② **TOTAL HOST INCOME $CAD** field. The block can also be used alone, but it will then require manual calculation for the "**TOTAL HOST INCOME $CAD**" field.

There are four sub-blocks. "**LICO Determination**" requires minimal input to make the calculation. As soon as the ① **TOTAL HOST INCOME** is available, it calculates the number of family members such income can cover (③). If the family size is unknown, it at least provides that level of details for the decision maker. Alternatively, if only the family size is known but not the total income, a note will be displayed, ④, to say how many family members such income can cover.

Ideally, we should have both information, and in that case, an information box, ⑤, will appear to provide a feedback on whether or not the LICO requirement is met for the application.

The other three sub-block requirements, "**Letter of Support**", "**Proof of Relationship**", and "**Medical Insurance**" are straightforward. Users need to select appropriate options.



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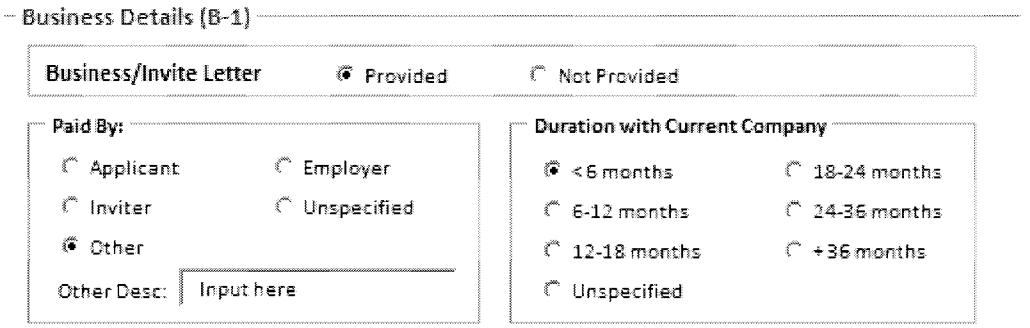
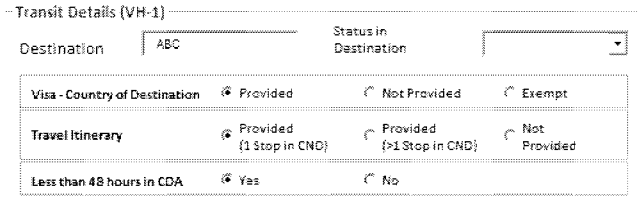
5.3.2 Business Details (B-1)

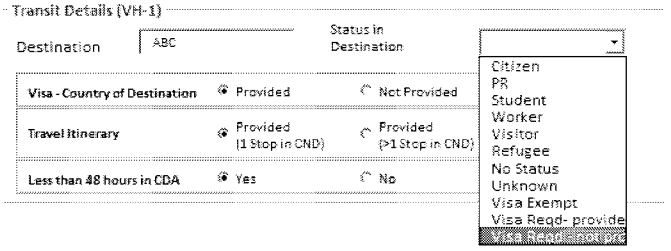
Purpose: to cover useful information for assessing business visitors. Users need to select an applicable option for each sub-block. For "**Paid by**", "**Other Description**" text field is unlocked when "**Other**" is selected.



5.3.3 Transit Details (VH-1)

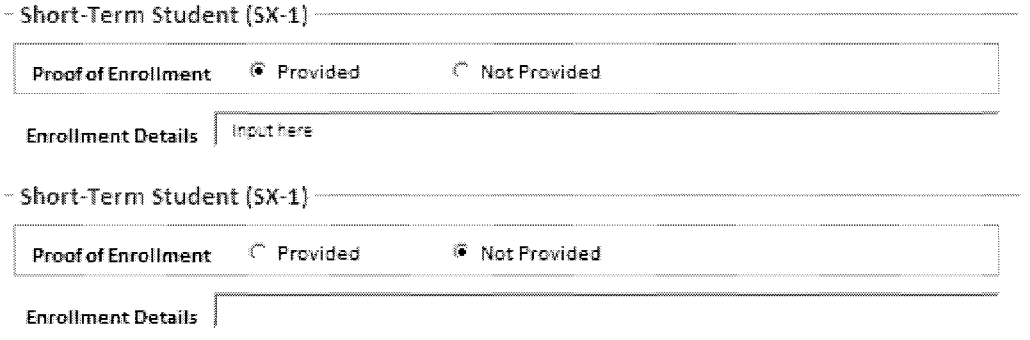
Purpose: to provide information about the category's requirements. Users have to type the destination country, select one option from "**Status in Destination**" and then an applicable option for each of the three requirements.





5.3.4 Short Term Student (SX-1)

Purpose: For short-term student, "**Enrollment Details**" field will be unlocked for pre-assessment only if "**Proof of Enrollment**" is "**Provided**". Note that if prompted and left blank, the enrollment details will show as "not pre-assessed" in the notes.



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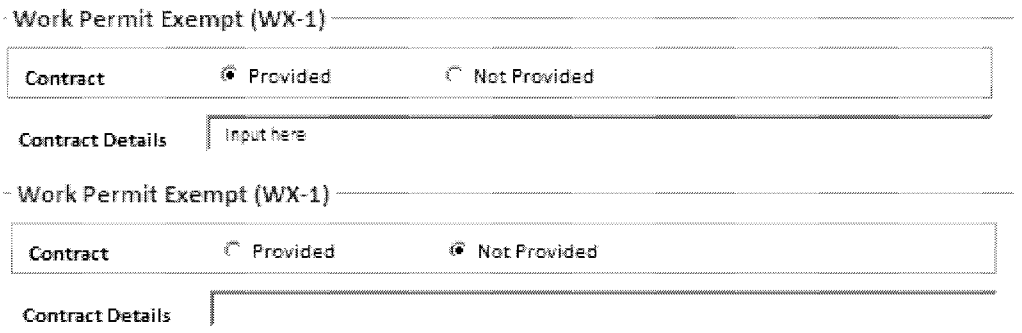
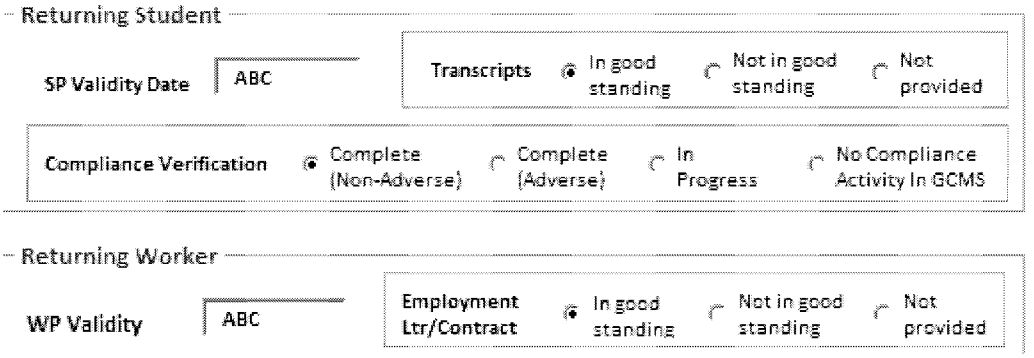
5.3.5 Work Permit Exempt (WX-1)

Purpose: This blocks works as the same as the "**Short-Term Student**" block.



5.3.6 Returning Student and Returning Worker

Purpose: "**Returning Student**" et "**Returning Worker**" block respectively provides two and three self-explanatory pieces of information relevant to the category.



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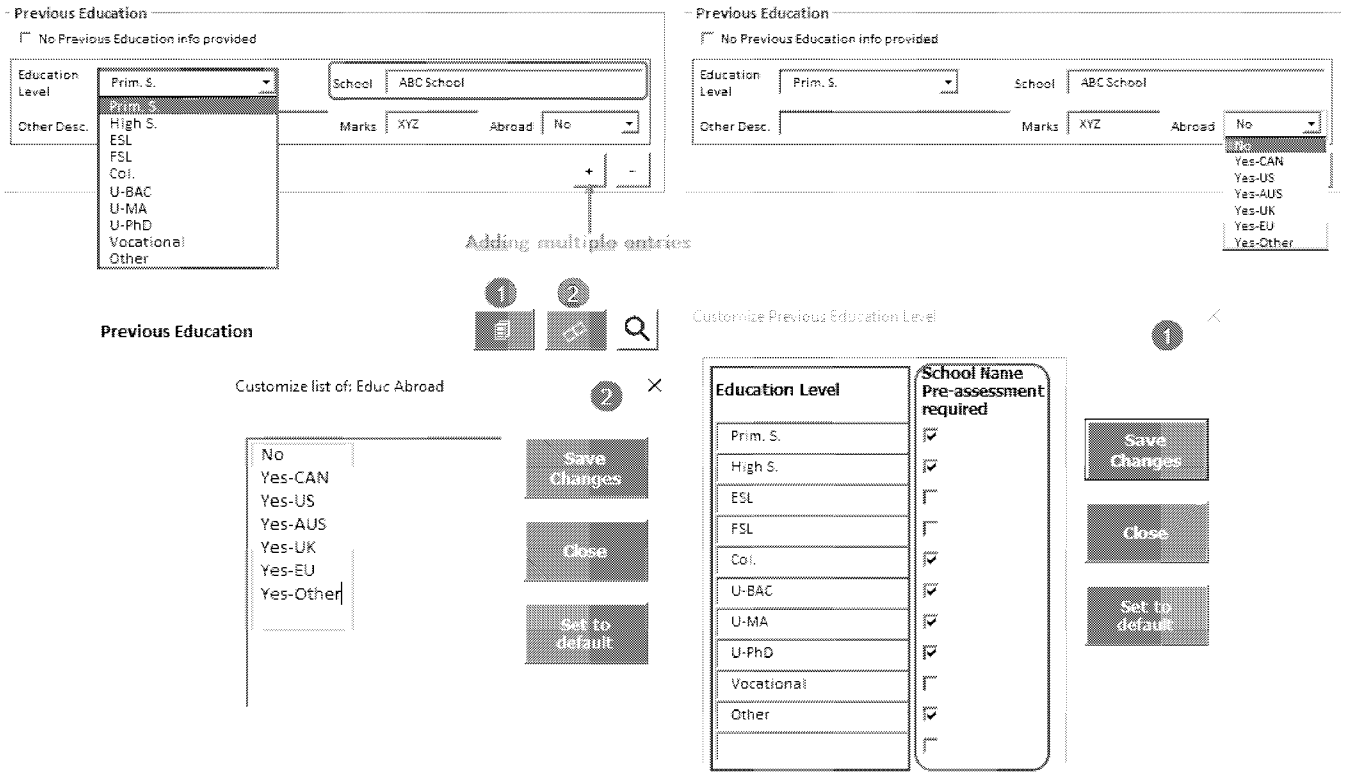
5.4 SP & WP SPECIFIC BLOCKS

5.4.1 Previous Education

Purpose: to provide information regarding an applicant's past education. Adding multiple entries is available for this block. If there is no relevant information on file, "**No Previous Education info provided**" checkbox should be checked, which will then make the whole block collapse. Otherwise, users must complete all four fields, "**Education Level**", "**School**", "**Marks**", and "**Abroad**".

Customization(s): The "**Education Level**" dropdown is customizable, and admin users can determine which levels school names need to be pre-assessed (1). The "**Other**" option is mandatory as it unlock the "**Other Description**" field. The "**Abroad**" dropdown is also customizable with up to 25 options (2).



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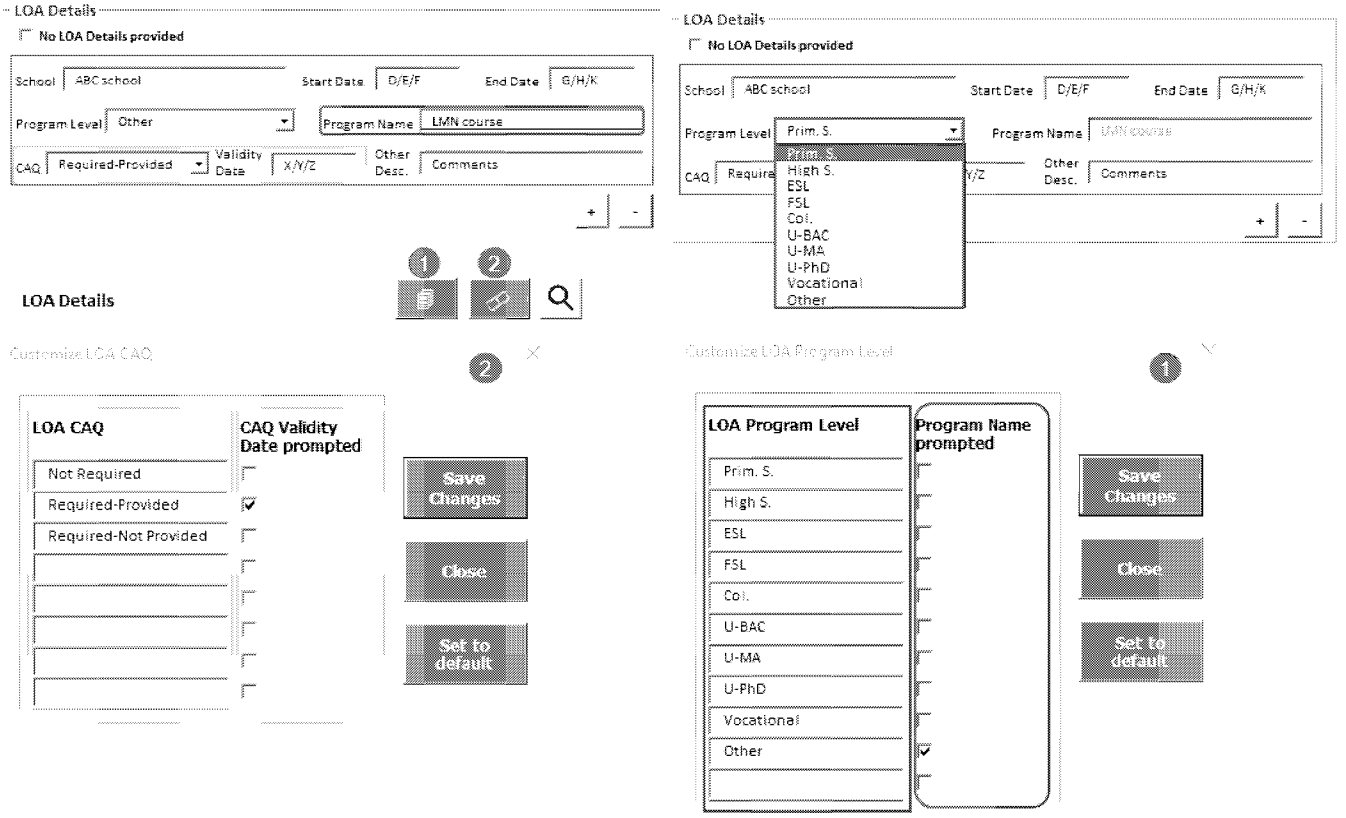
5.4.2 LOA Details

Purpose: to provide information regarding an applicant's Letter of Acceptance issued by schools in Canada. This block follows the same model as the "**Previous Education**" block. "**Validity Date**" of CAQ is available for pre-assessment, however, this information is already included in MOD3. Therefore, a mission can have its pre-assessors NOT pre-assess the field through the customization settings.

Customization(s): The "**CAQ**" dropdown is customizable up to 25 choices and admin users can select which choice the "**CAQ Validity Date**" needs to be pre-assessed. "**Program Level**" works the same way, meaning only selected choices will enable "**Program Name**" field.



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5.4.3 IELTS

Purpose: This block requires one option box to be selected. If the score selected is 6 or above, "**All Bands at 6.0 or above**" field will be triggered. "**IELTS verified**" checkbox will display as "*Not verified*" in the pre-assessment notes if left unchecked and "*Verified*" if checked.

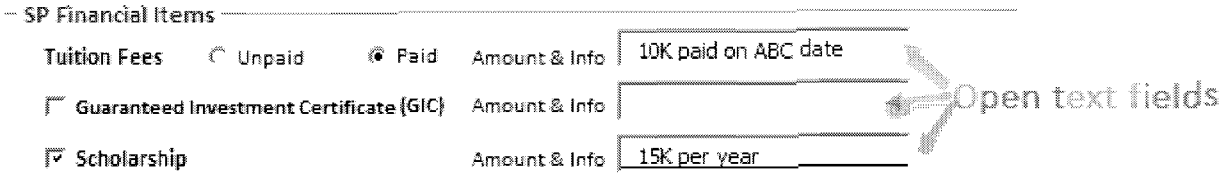
Customization(s): No customization options are available for this block.

5.4.5 SP Financial Items

IMPORTANT This block's name has been updated in a previous version. If you plan to import your previous customization into the new version, make sure you double check the imported blocks and replace the block listed with the old name with the new one. Not doing so will cause the block not to be prompted for pre-assessment at all.

Purpose: This block is non-mandatory, as the covered information is not applicable to all cases. If it is not pre-assessed, no alert message will pop up, and no "*Not Pre-assessed*" remark will show up in the pre-assessment notes. If there is information on file, pre-assessors should use appropriate items. "**Amount & Info**" fields are open text and are enabled when checkboxes in front of them are checked.

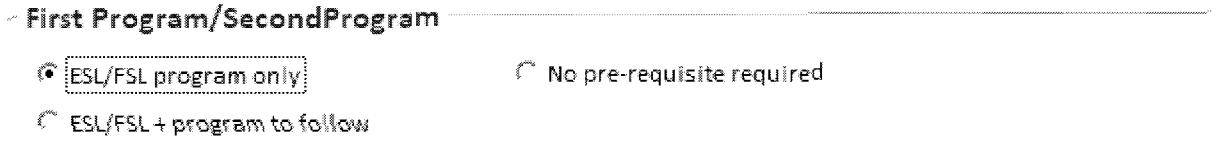
Customization(s): No customization options are available for this block.



5.4.6 First Program/Second Program

Purpose: This block is still available but is not part of the defaults and may not be relevant anymore. The "**LOA Details**" block ensures a higher level of pre-assessment of an applicant's intended study programs. However, it remains available should your office prefer to use it.

Customization(s): No customization options are available for this block.



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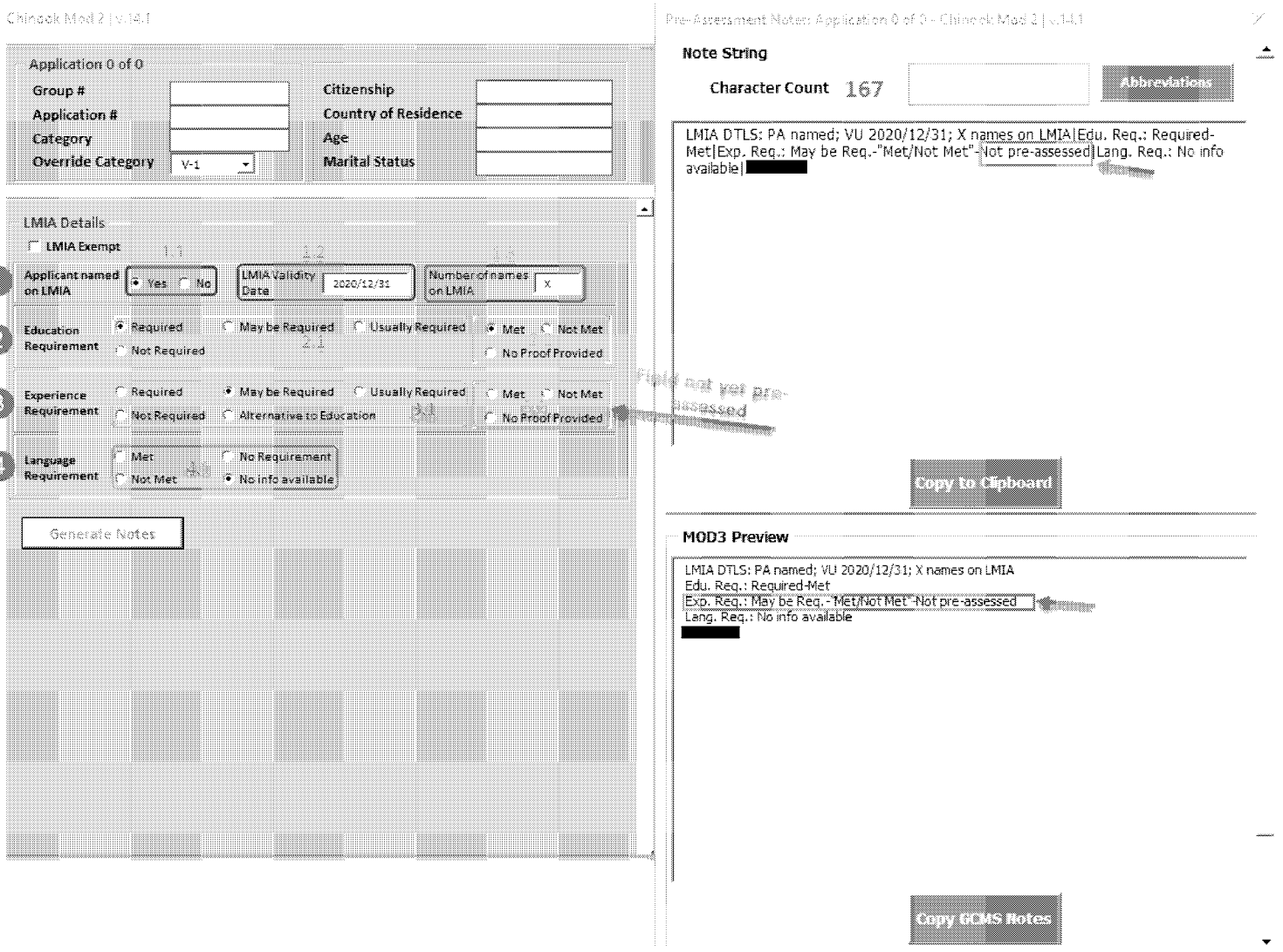
5.4.7 LMIA Details

Purpose: LMIA Details block has two display possibilities.



The display appears by default and covers pre-assessments when a LMIA is required. The four sub-blocks, 1 2 3 4, should be fully pre-assessed by selecting appropriate options.

For 1 **Applicant named on LMIA**, three fields must be pre-assessed and for 2 **Education Requirement** and 3 **Experience Requirement**, two fields must be pre-assessed for each sub-block. If any filed is left blank, "*Not Pre-Assessed*" remark will appear in the pre-assessment notes for each missing field.

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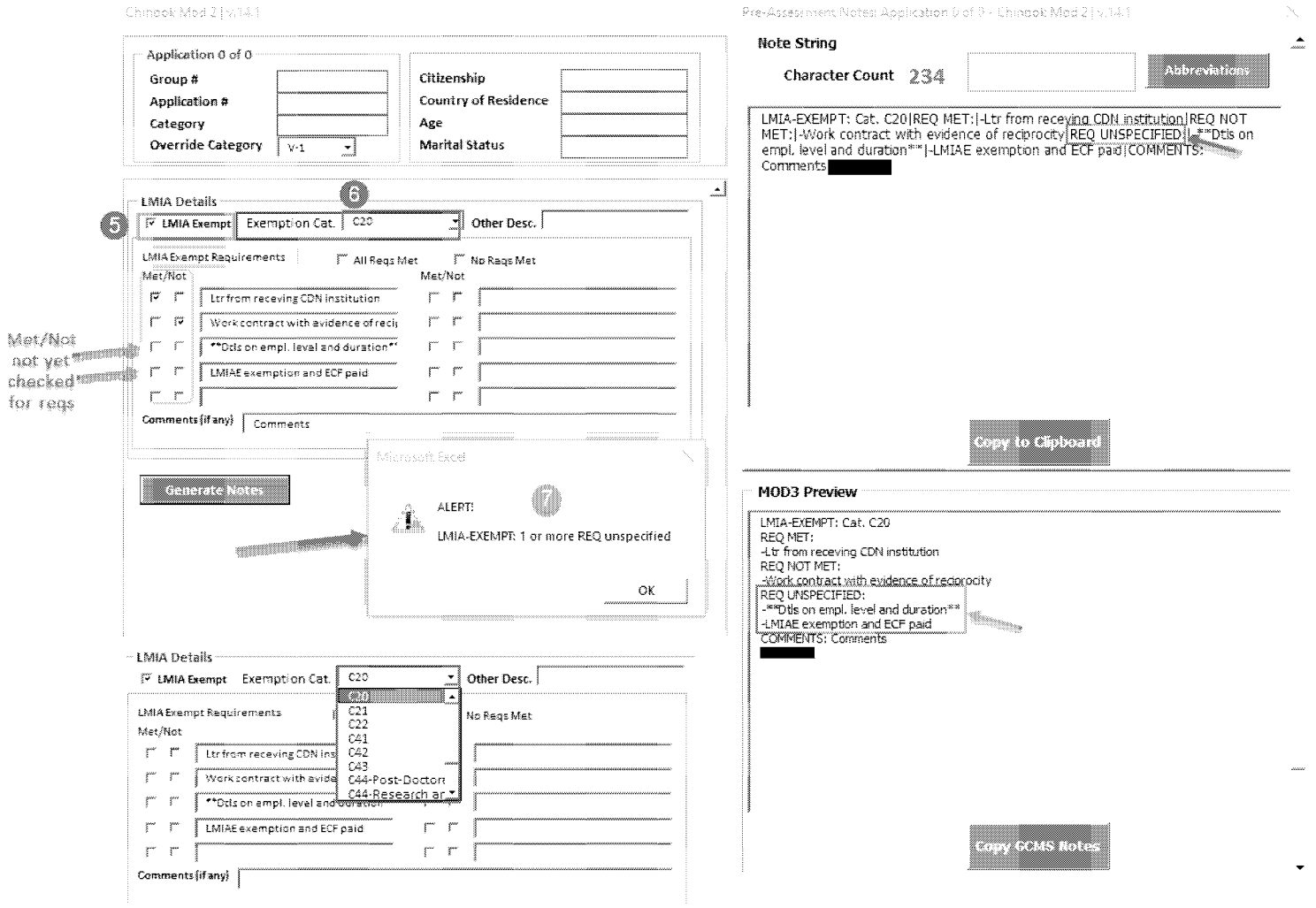

The second display appears only when (5) **LMIA Exempt** checkbox is checked. (6) **Exemption Cat.** includes a dropdown of exemption categories. When one category is selected, its list of requirements will be automatically display under "**LIMA Exempt Requirements"**. Pre-assessors then need to confirm whether each requirement is met or not by checking "**Met**" or "**Not Met**". To reduce the number of clicks, either "**All Reqs Met**" or "**No Reqs Met**" checkbox can be checked.

NOTE: If a requirement is not indicated as met or not met, an (7) **ALERT!** message will pop up after clicking the "**Generate Notes**" button, and it will appear as "**REQ UNSPECIFIED**" in the pre-assessment notes.

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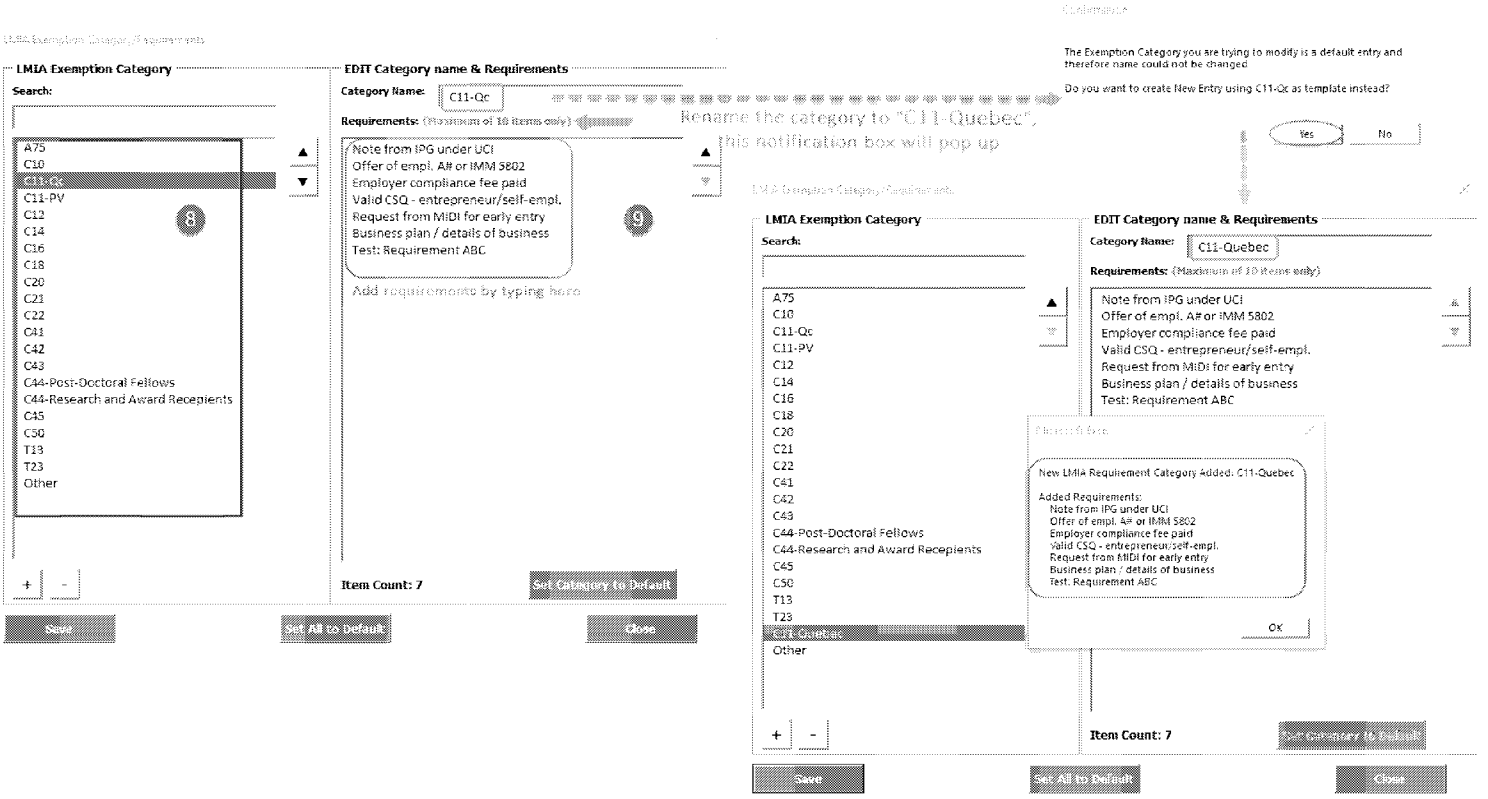

Picture 07: LMIA Exemption Category/Requirements customization

Customization(s): 8 **LMIA Exemption Category list** is customizable. The "**Other**" is mandatory which will trigger the "**Other Description**" field. Each category requirement list, 9, is also customizable and contains **up to** 10 requirements each. You can add new requirements by simply typing in the blank filed.

As the current available categories are the default setting, renaming a category will result in creating a new category with a new name and the same template as the current category. To avoid confusion, admin users should remove the duplicate this would create.

> **Example**: Renaming "C11-Qc" category to "C11-Quebec" will not remove the "C11-Qc" category, but will create a "C11-Quebec" category with the same template as the "C11-Qc".

When customizing the requirements, the number of characters should be taken into consideration. As the default setting does not use much abbreviation, if LMIA-exempt pre-assessment notes often go beyond 1000 characters, working modifications should be considered.

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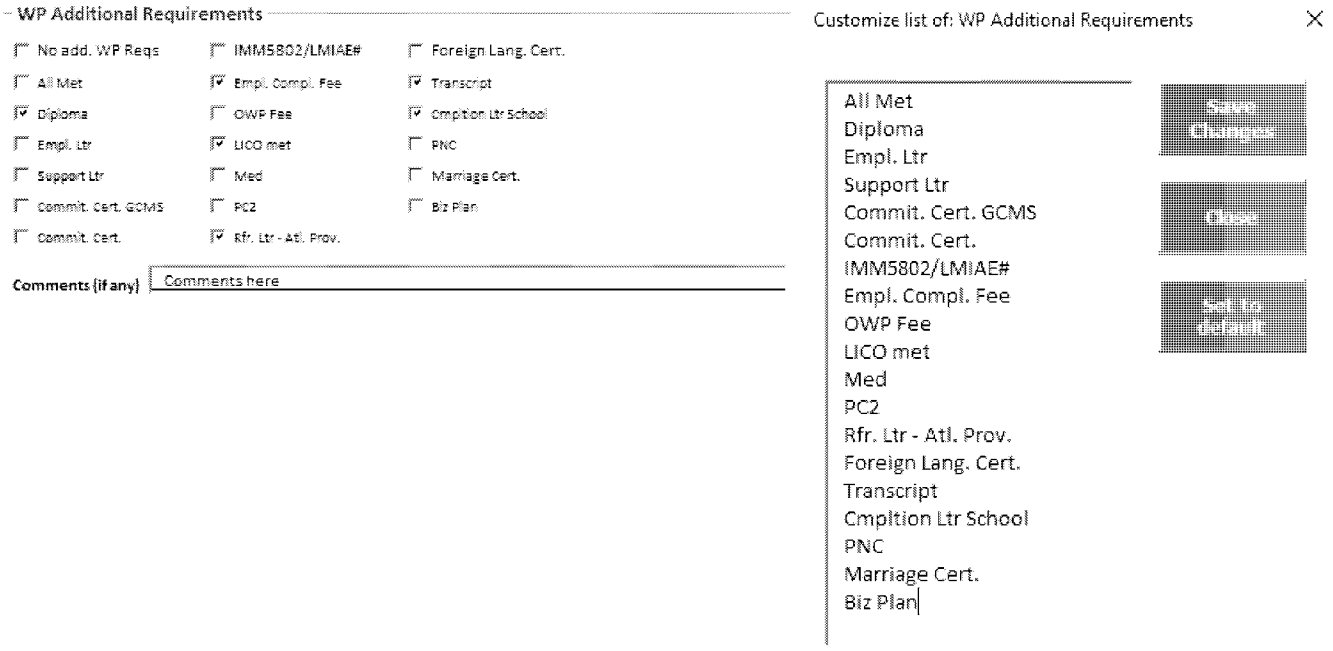
5.4.8 WP Additional Requirements

Purpose: This block had been added to provide a quick solution while the "**LMIA Exempt**" part of the "**LMIA Details**" block was being developed. The block remains available, however, missions should consider removing it from the WP LoB and complete the customization of the exemption categories in the "**LMIA Details**" block instead.

Customization(s): List of "**WP Additional Requirements**" is customizable.

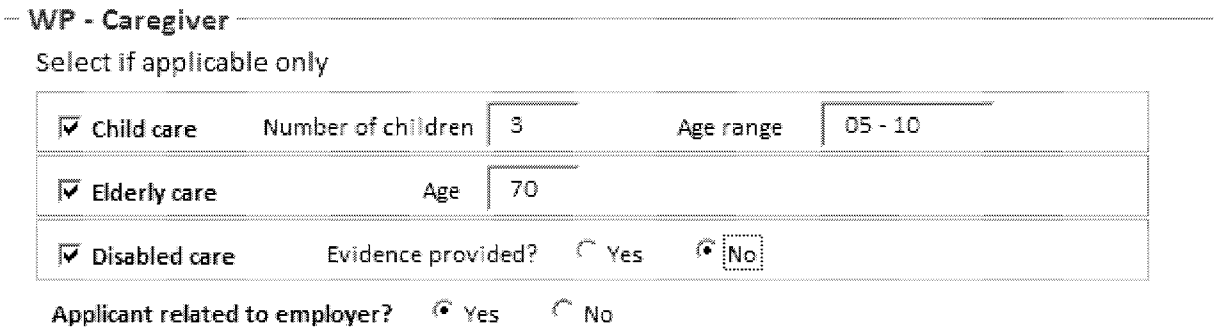


5.4.9 WP Caregiver

Purpose: to provide additional information to decision-makers on this specific WP category. This block is non-mandatory as it would not apply to all pre-assessments. Offices without such caseload may wish to remove it from their WP LoB.

Three situations are covered. When one is selected, additional pre-assessment items, as well as "**Applicant related to employer**?" checkbox, with turn from grey to white and must be completed.

Customization(s): No customization options are available for this block.



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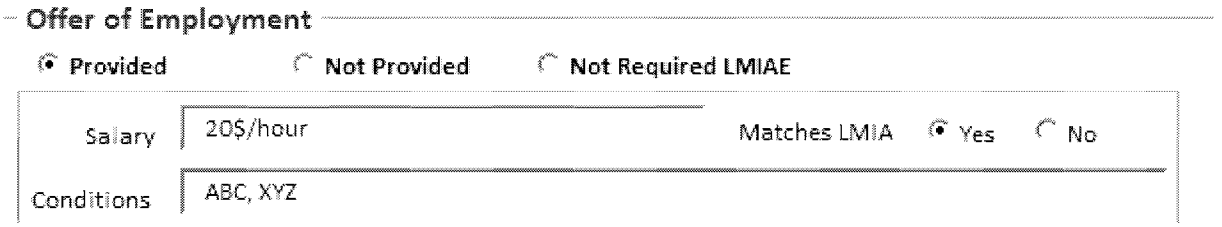
5.4.10 Offer of Employment

Purpose: to provide information regarding an applicant's offer of employment in Canada, if there is one. Only if "**Provided**" checkbox is checked, "**Salary**" and "**Conditions**" sub-blocks will be prompted.

Customization(s): No customization options are available for this block.



s.15(1)(i)i)
s.16(2)(c)

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CHINOOK

Welcome to the Chinook Module 5 Indicator Submission Template!

In order to submit a new set of indicators for inclusion in Chinook Module 5, you must complete the attached submission template.

The submission will be reviewed by NHQ and if approved, added to the following Module 5 indicator database for use across IRCC.

How to Complete the Form

IRCC Office Name: Select from the dropdown to match Chinook Module 5 Source List.

Summary of Submission: Indicate here a brief summary of the submission, including how it was encountered. This is your opportunity to explain why this indicator set should be included in Module 5.

Source: Select from the dropdown to match Chinook Module 5 Source List.

Rule Origin: Select from the dropdown to match Chinook Module 5 Source List.

Rule Type: Select from the dropdown to match Chinook Module 5 Source List.

Criteria: Indicate the criteria/filters that will be used to identify the applications/clients which will be filtered for in Chinook.

Ex. Client COB **equals**

Employer **CONTAINS** "Engineer"

DLI **does NOT equal** University of Ottawa

Please be precise and try to ensure your criteria do not capture too wide of a group. Ensure you select criteria only from one module OR the other. You cannot combine criteria from Mod1 and Mod3.

You can use equals (==), does not equal (!=), or contains (~=)

Validity Period: 4 months is the default period for an indicator set to be included. Only provide justification if anything other than 4 months is required.

Rule Logic: Provide a short explanation of the logic for rule inclusion in Chinook Module 5.

s.15(1)(i)i)
s.16(2)(c)
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CHINOOK

Ex.

Rule Instructions: Indicate here the information/instruction to be displayed to user if the indicators are matched.

Examples:

Sample Application Numbers: Use this field to provide some sample application numbers which should match the criteria you have provided that can be tested. If the sample application numbers do not get flagged in Chinook, we will revert to you for additional information.

Other: Use this section to provide any other pertinent information which could not be included in the above. For example, if you have suggestions for how to expand the source, origin or type lists, include this information in this section.

How to submit the form: Once the form is complete, please save with the following naming format:

Mod5 Submission – [Office Name] – [Submission Date DD.MM.YYYY] – [Sequence #] (if submitting multiple submissions on the same day, the sequence # should increase

Ex. "Mod5 Submission – 190211 – 1"

The saved submission is to be sent to: **IRCC.INRAO-AORRI.IRCC@cic.gc.ca**

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Annex A:

Module	Column	DataType

s.16(2)(c)

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CHINOOK

IRCC Chinook Module 5 – Indicator Submission Template

Submission Date: 2021-06-23

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IRCC Chinook Module 5 – Indicator Submission Template

Submission Date: 2021-06-23

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CHINOOK

IRCC Chinook Module 5 – Indicator Submission Template

Submission Date: 2021-06-23

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IRCC Chinook Module 5 – Indicator Submission Template

Submission Date: 2021-06-23

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TRV Journey Lab ::

Chinook+ & GCMS Chinook Tab

USER MANUAL v.3

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Specific procedures

Generalities

If you are currently using paper file locations or Organizations to manage your TR inventory, Chinook Taskmaster doesn't care. Those fields are not included in the module. However, Chinook Taskmaster has two rules which may conflict with your current inventory management system:

- **Applications in permanent groups are kept together**
- **Applications that have a value in the Assigned To field can only be pulled by that person**

Make sure that the **Assigned To field** is used sparingly; it should only be used when one specific person should perform the next task. It should not be used for routine file distribution or other tracking purposes.

- Ensure that GCMS IDs are removed from the field when you are finished with the task.

Close also **Temporary Processing groups** when you are done with them. There is an activity line in Module 1, ***Temporary Groups Open Ready for Review,*** to assist with inventory cleanup.

You are encouraged to perform a cleanup of **Assigned To** and obsolete **temporary groups** before using Chinook Taskmaster. If you don't, you may see unexpected results.

Chinook Taskmaster includes a **No Match** activity. Applications in this list do not match any activity, and are therefore off the rails or exceptional. A best practice is to include a quality control in your process, to review applications into the **No Match** activity, and provide feedback on correct file management.

Work-Sharing Procedures

You may be sharing or helping with some part of a **TR caseload** with another office. In this arrangement, the **Primary Office** remains that of the office primarily responsible for the caseload. Shared applications are processed by users **in the other office** with a GCMS role in the Primary Office. These SOPs do not apply to applications that are transferred to another office.

Work-sharing offices should ensure that they are using centralized data pulls for their own office and their workshare offices. The other office should be a secondary office on the applications. If not, you will need to perform a workaround (see below).

If you are working on caseloads for multiple primary offices, you can load the daily data for those offices and then use the Primary Office filter to select different workshare offices in the Taskmaster.

Secondary Office workaround

Use these workarounds if the other office is not a secondary office.

1. If you have a role in the secondary office, you can transfer the applications to the secondary office and then using your secondary office role, transfer them back to the primary office. This will set the other office as secondary on the applications.
2. Alternatively, do not set the other office as a secondary office; instead, you will assign the applications to individual users in the other office.

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Primary Office

Pull applications in **Taskmaster** for the activity that you wish to share with the work-sharing office.

If the other office **is a secondary office**:

1. Query for the applications in GCMS under IMM > TR
2. Use Change Records to set the "**Assigned To"** to the **RC code** of the other office (e.g.

If the other office **is not a secondary office**:

1. Query for the applications in GCMS under IMM>TR
2. Use Change Records to set the "**Assigned To"** to the **GCMS User ID** of the intended user

Other Office

Use the Work-sharing **RC Code/ Assigned to toggle** to find applications assigned to your **office** or **User ID**.

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s.16(2)(c)
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MODULE 3: Decision Maker Module

USER MANUAL v.3

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Revision History

Draft Version	Description	Date	Author
Draft v0	Description and detailed instructions of how to use new Chinook + and GCMS Chinook Tab (Stage 2 of Rollout)	27FEB2020	Lisa Catana
v1	Amendments to Biometrics Logic	10MAR2020	
v2	Amendments to Logic Inclusion of SP/WP/EXT functionality	27APR2020	Lisa Catana
v3	Update to screenshots and functionality for Mod 3 – excludes Chinook+/Chinook Tab	16JUN2020	Lisa Catana

Contact

For any questions and/or comments relating to Chinook please contact the Chinook mailbox at IRCC.INChinook-ChinookRI.IRCC@cic.gc.ca

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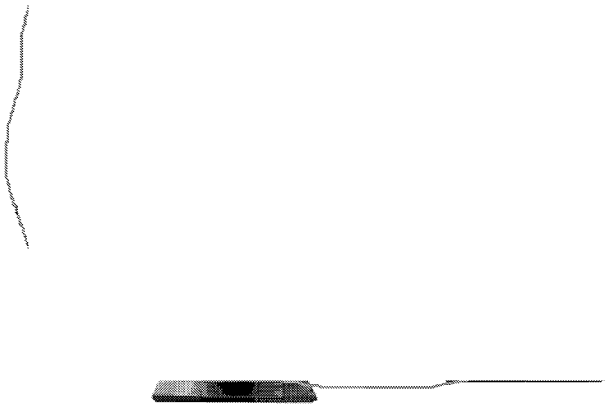
What is Module 3 - Decision Maker Module?

The Module 3 - Decision Maker Module is a tool that aims to increase the quantity of decisions that an officer can make on any given day as well as improve the quality of those decisions. Increased efficiency is gained by bringing a range of pertinent information required for making decisions together in one place where it can be reviewed easily and effectively. Module 3 is organized in such a way that efficiencies of scale can be produced by processing like cases together and facilitating grouping in the finalization process.

Set up and get started

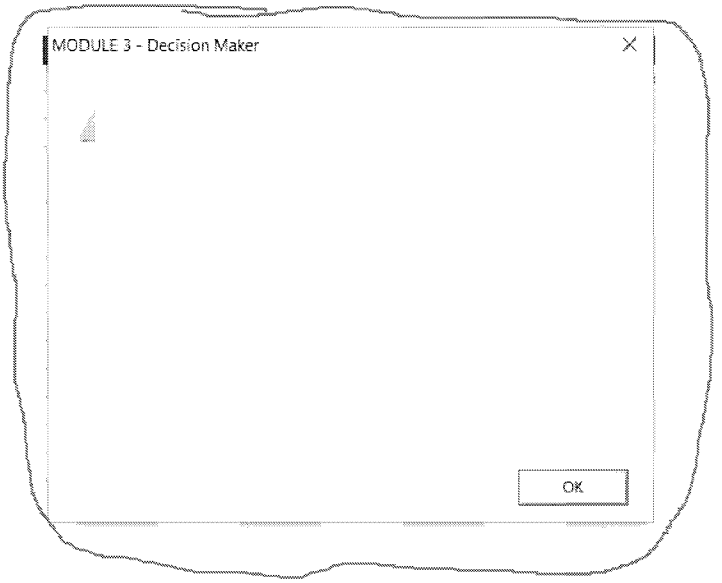
Setting up your workstation

1. For best results, organize workstation so that you have one monitor in a landscape orientation (to be used with Chinook) and your other in Portrait (to be used for GCMS).



Set-up for Chinook Module 3

2. Open *Chinook – Module 3 – Viewer.xlsb*
3. Read the Disclosure dialogue box and click *OK*



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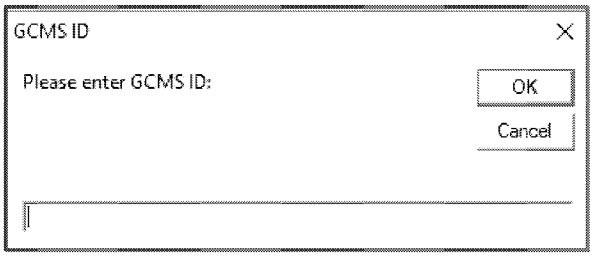
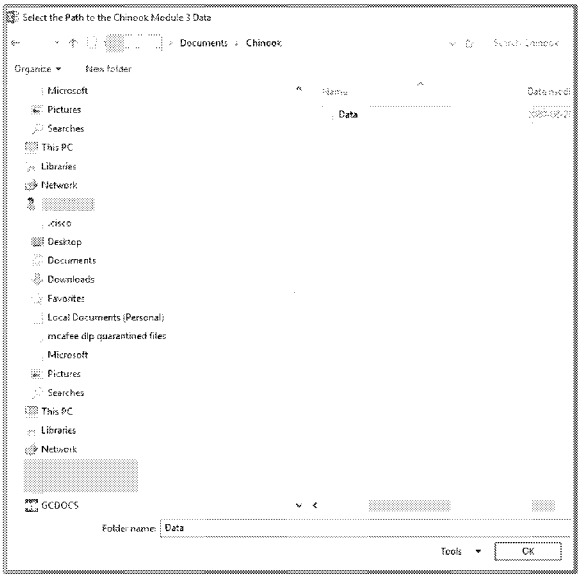
4. **Enter your GCMS ID:** When prompted, enter your GCMS ID



Data Path

5.



6.

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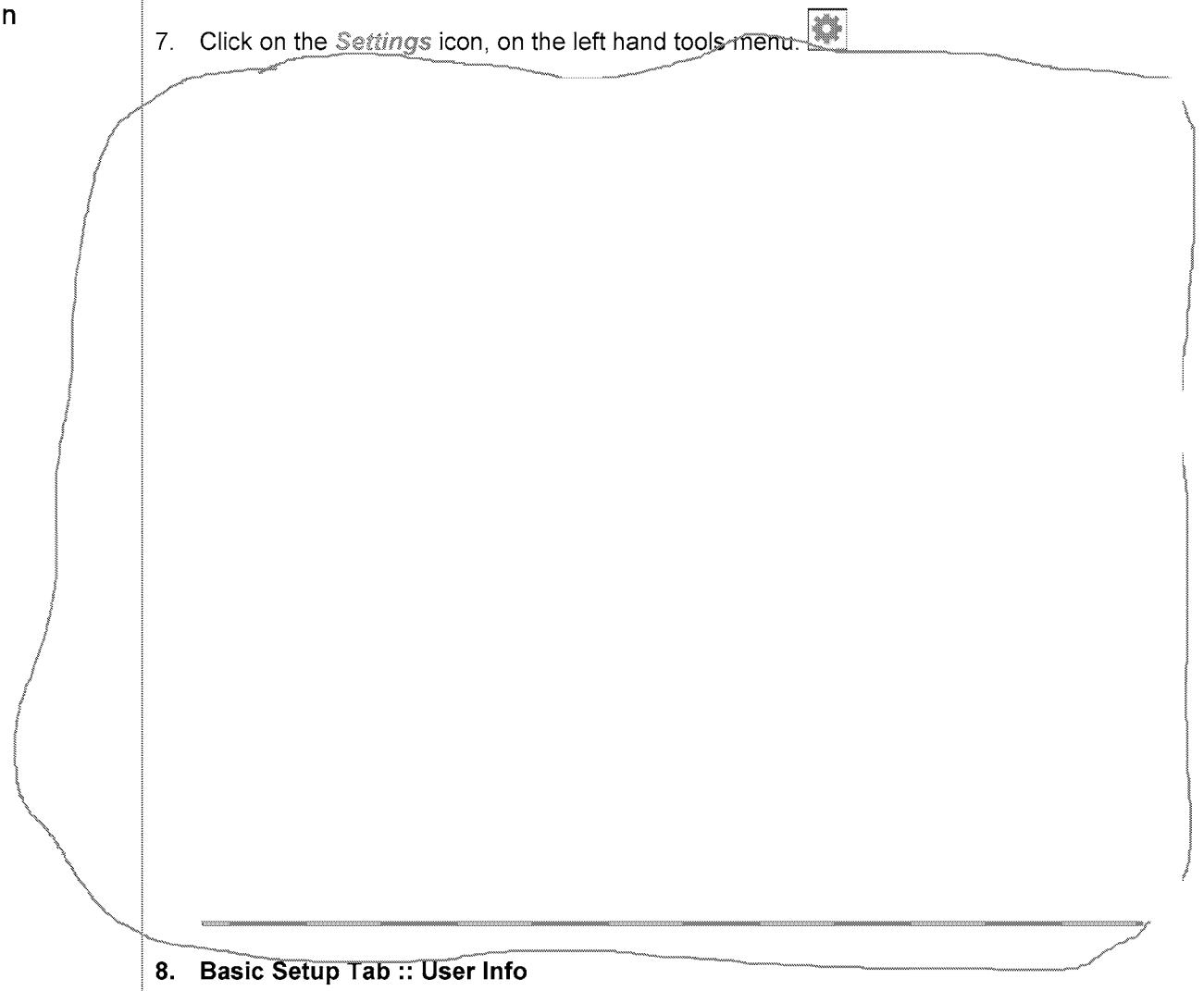
s.16(2)(c)

Using the Settings button

7. Click on the *Settings* icon, on the left hand tools menu.



8. **Basic Setup Tab :: User Info**

9.

10.

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s.16(2)(c)

Using the Settings button (continued)

-
-
-
-
-

11. **Column Setup Tab:** Use the checkboxes to customize the Module 3 columns displayed. Unchecking a box will hide that column from view.
    - Ex. If your office does not conduct pre-assessment, hide this field to save space on your screen.

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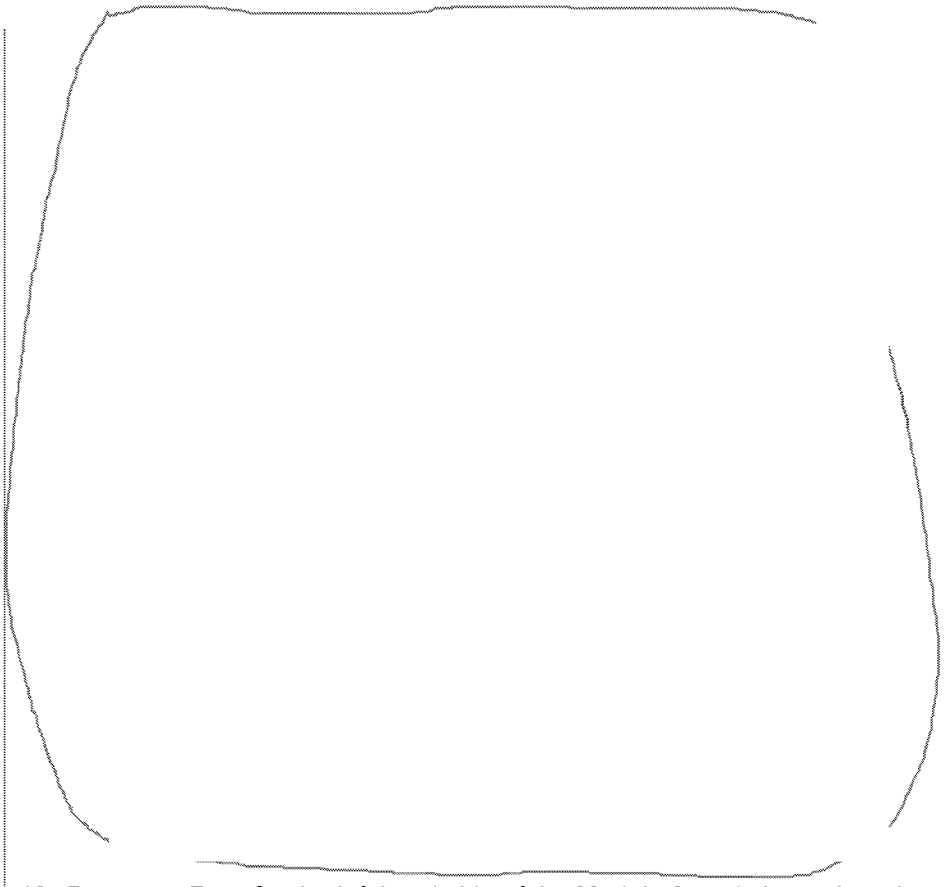
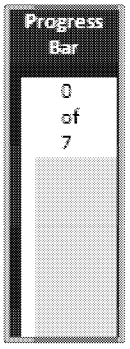
Progress Bar and Hot Keys



12. **Progress Bar:** On the left hand side of the Module 3 worksheet, there is a progress bar for users to easily see the number of applications entered into the tool, and how many have been actioned. The progress bar will update as you complete the Action column for any application.



13. **Navigation:** As Chinook is an Excel based tool, you can use hot-keys in Excel to facilitate navigation. The Chinook Decision Maker Module has various hotkeys built in to limit the user's need to use the mouse. Hotkeys options are indicated by underlining a letter on the button/action.

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See below for some examples:

Hot Key	Function
Home/Debut	Will return your viewer back to Column F.
ALT+D	Open Display Popup
ALT+L	Launch Action List
ALT +S	Launch Input Apps Window

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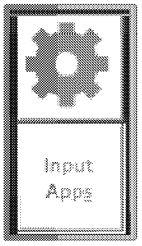
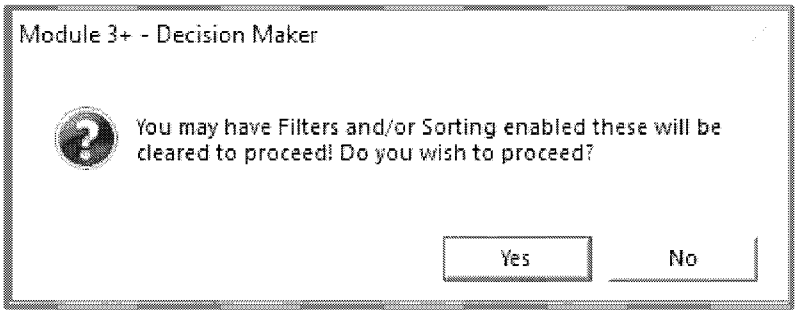
Inputting & Reviewing Applications in Module 3

Inputting Apps

1. **Input Applications**
   - To input applications, click the *Input Apps* button on the left hand Tool Menu.



   - A warning message will pop-up advising that any filters/sorting currently used on the Module 3 sheet will be cleared. Click *Yes* to proceed.



   - Enter Application numbers and/or Group numbers in the Input Apps window when prompted. Click *Input Applications* when complete.

     NOTE: If you enter both Group and Applications numbers, the group numbers will be pasted in first to the tool, then the application numbers.

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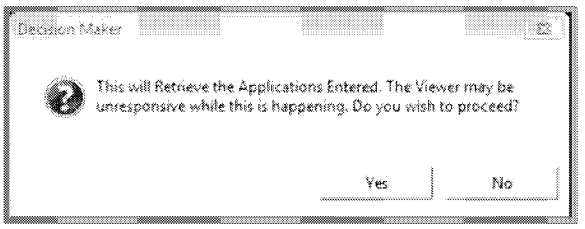
Inputting Apps (continued)

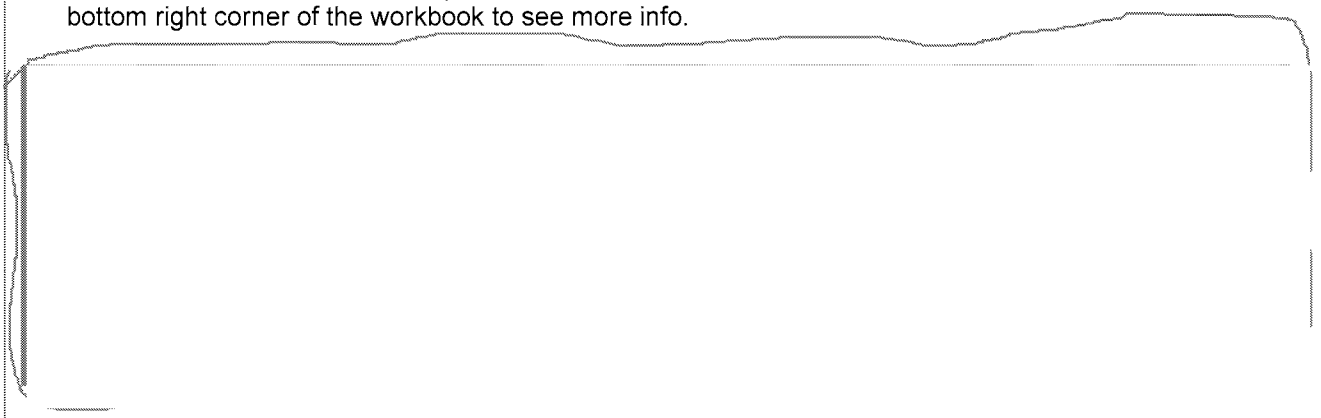
- Once applications entered, the tool will advise that is about to retrieve the data and may appear unresponsive. Click *Yes* and wait for the data to be populated for the applications entered.



- You can monitor the status of the data upload in the bottom left-hand corner of the Excel screen.

Reviewing Applications

2. Each row in Module 3 will display the relevant information for the application. Use the scrollbar in the bottom right corner of the workbook to see more info.



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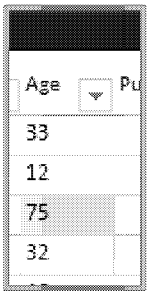

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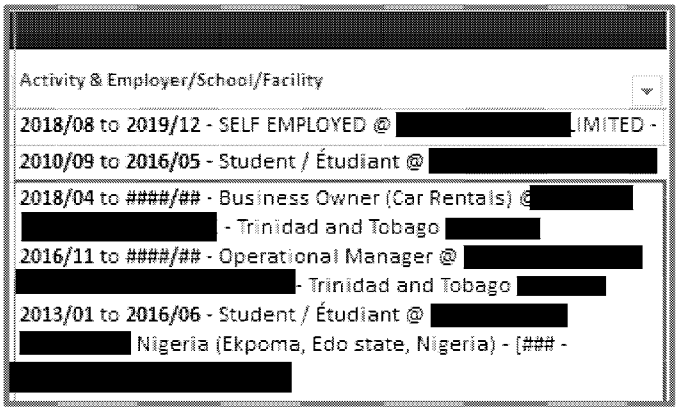
Reviewing Applications (continued)

- **Client & Application Information**: All the info under the **Client & Application Info** section is presented just as the client has declared in their application forms.
- **Activity & Employer/School/Facility:** The default will display the client's stated activities in reverse chronological order. To view all declared employment/education history simply click anywhere in the cell to expand to full view.



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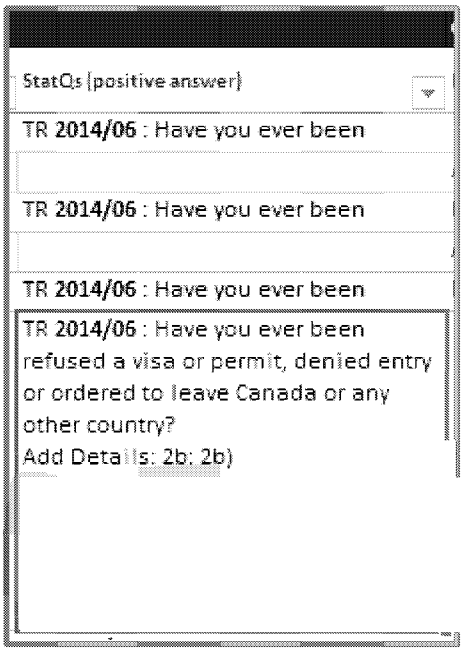

- **Previous GCMS History:**

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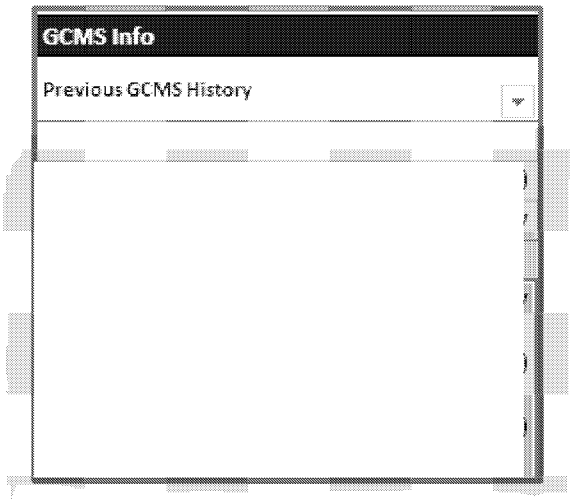
Reviewing Applications (continued



Sorting & Filtering

3. There are a number of ways use simple Excel functions to help organize the applications and the data in Module 3 using the Sort/Filter drop-down button on each column.

4. **Sorting**:
   - *Sort A to Z or Sort Z to A:* These will sort the list of data in alphabetical order or reverse alphabetical order.
   -

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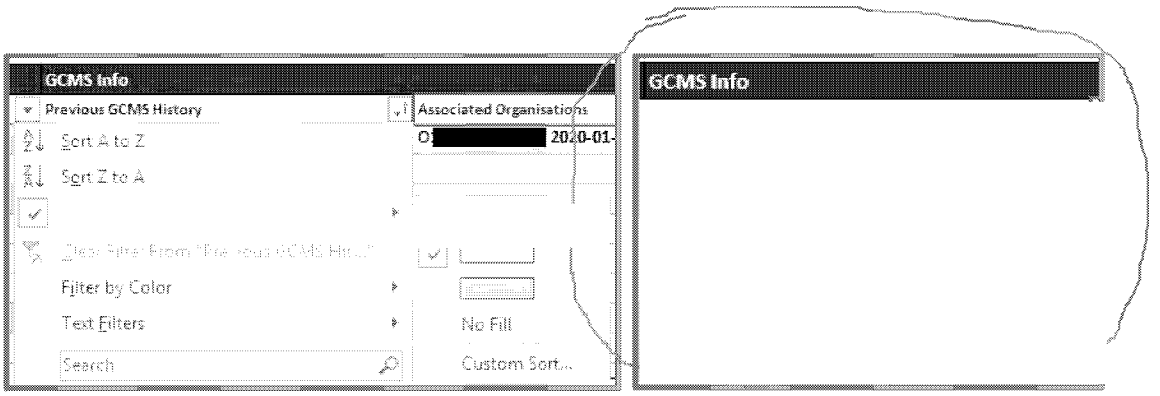
s.16(2)(c)

Sorting & Filtering (continued)

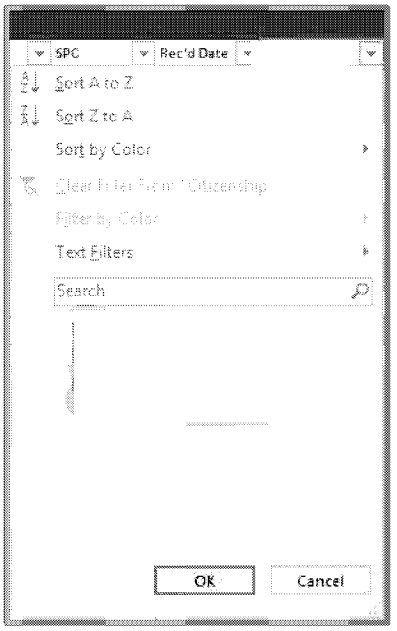


- *Multilayered Sort:* To combine different elements, click the down arrow and select "Sort by Color" (even if there are no colors) and then click "Custom Sort". This will provide options to run a multilayered sort first sorting by one column, and then another within that initial sort.

NOTE: Be careful when sorting and filtering that you don't accidently split groups (by applying filters that do not apply to all members of that group).

5. Filtering:

- *Filter checkboxes:* Use the checkboxes to filter your list. For example for the Citizenship column, you can restrict view to only applications of the same country.



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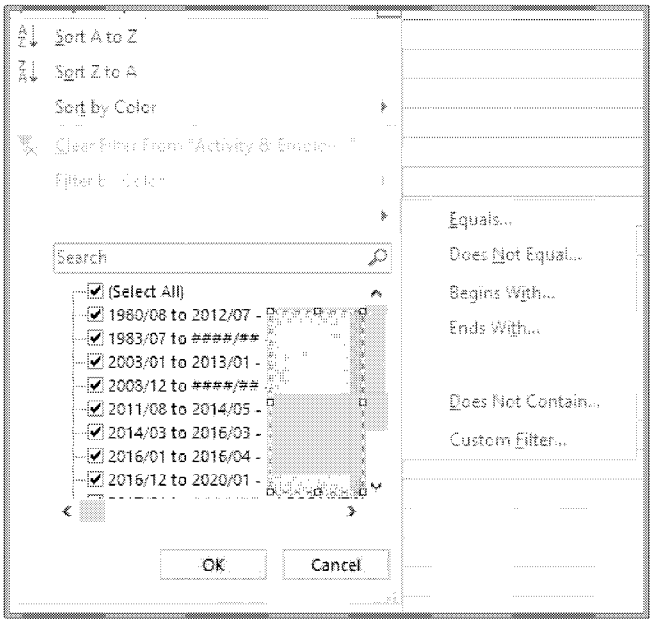
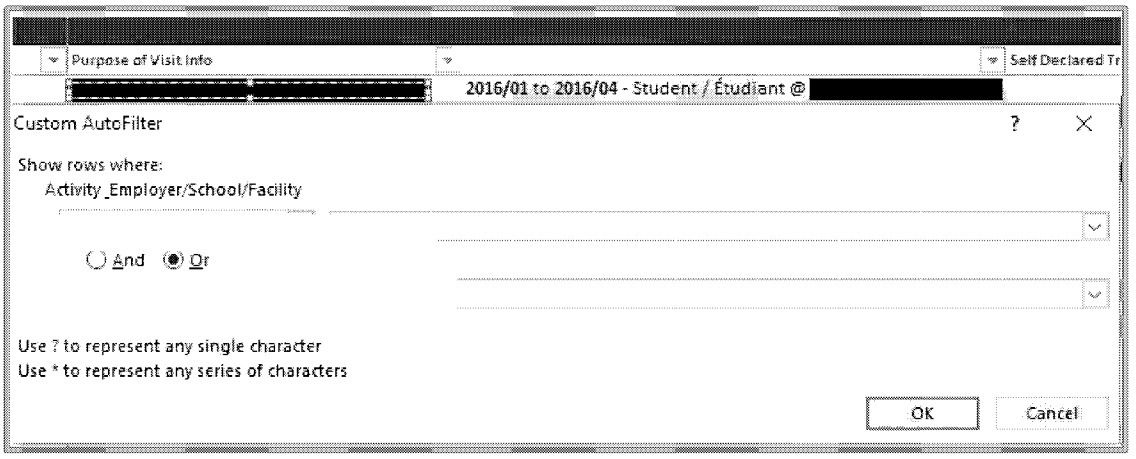
Sorting & Filtering Continued)





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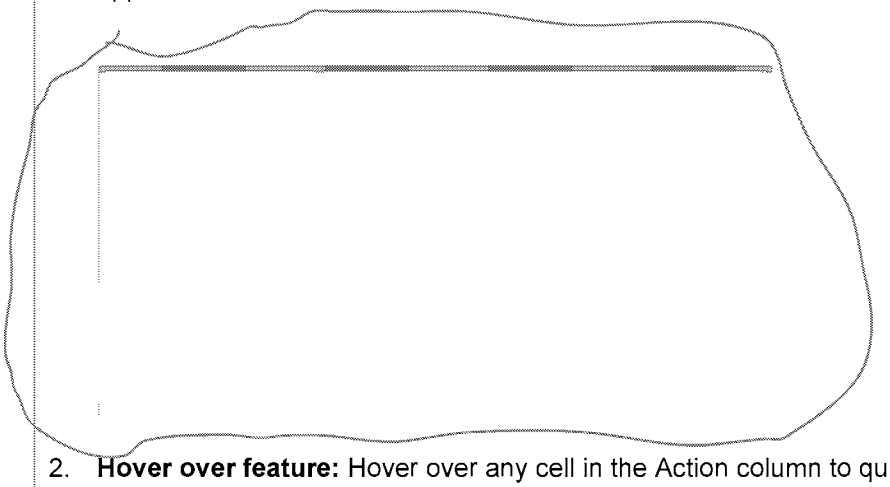
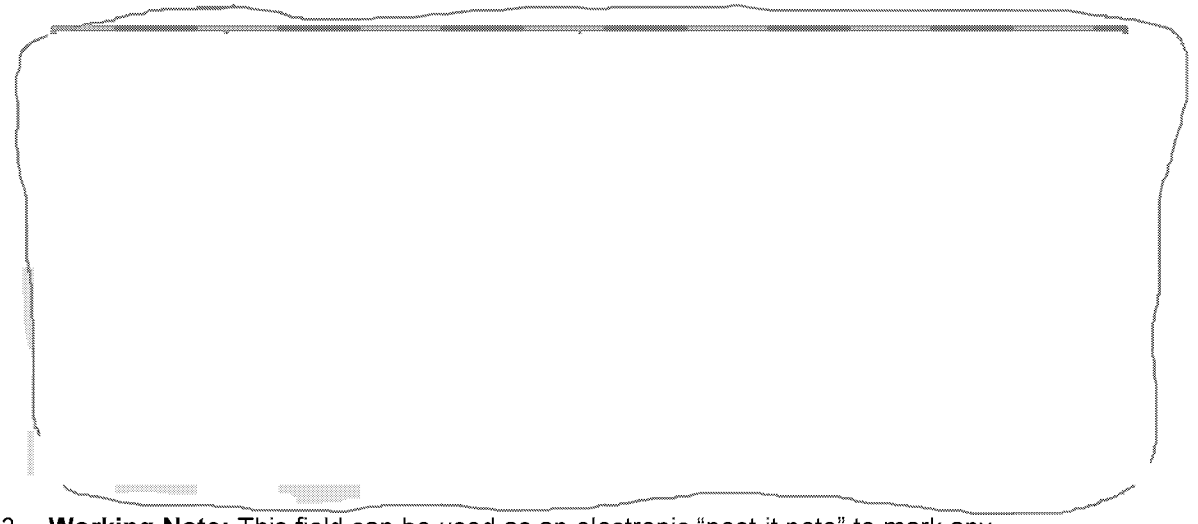
Finalizing Applications in Chinook

Using the Action Column

1. The Action column is where to indicate the intended action/decision to be taken for each application. Review the application and the information provided in Chinook. When you've determined what action is needed, click on *Action* column cell corresponding to the application.



2. **Hover over feature:** Hover over any cell in the Action column to quickly view the notes entered for an application.



3. **Working Note:** This field can be used as an electronic "post-it note" to mark any particular or special action required on an application. The working note DOES NOT get included as part of the note to be copied into the Notes tab. It is only for reference. For example, as you review the application and had concerns of the client's employment, you could enter a working note stating "review employment documents" as a reminder.

4. **To enter an action for a single application**: Highlight the Action cell corresponding to an application to launch the Action Window.

5. **To enter an action for a multiple applications:** In the Action column, highlight multiple cells for the corresponding applications to launch the Action Window then enter in the desired action and click Save Action & Notes.

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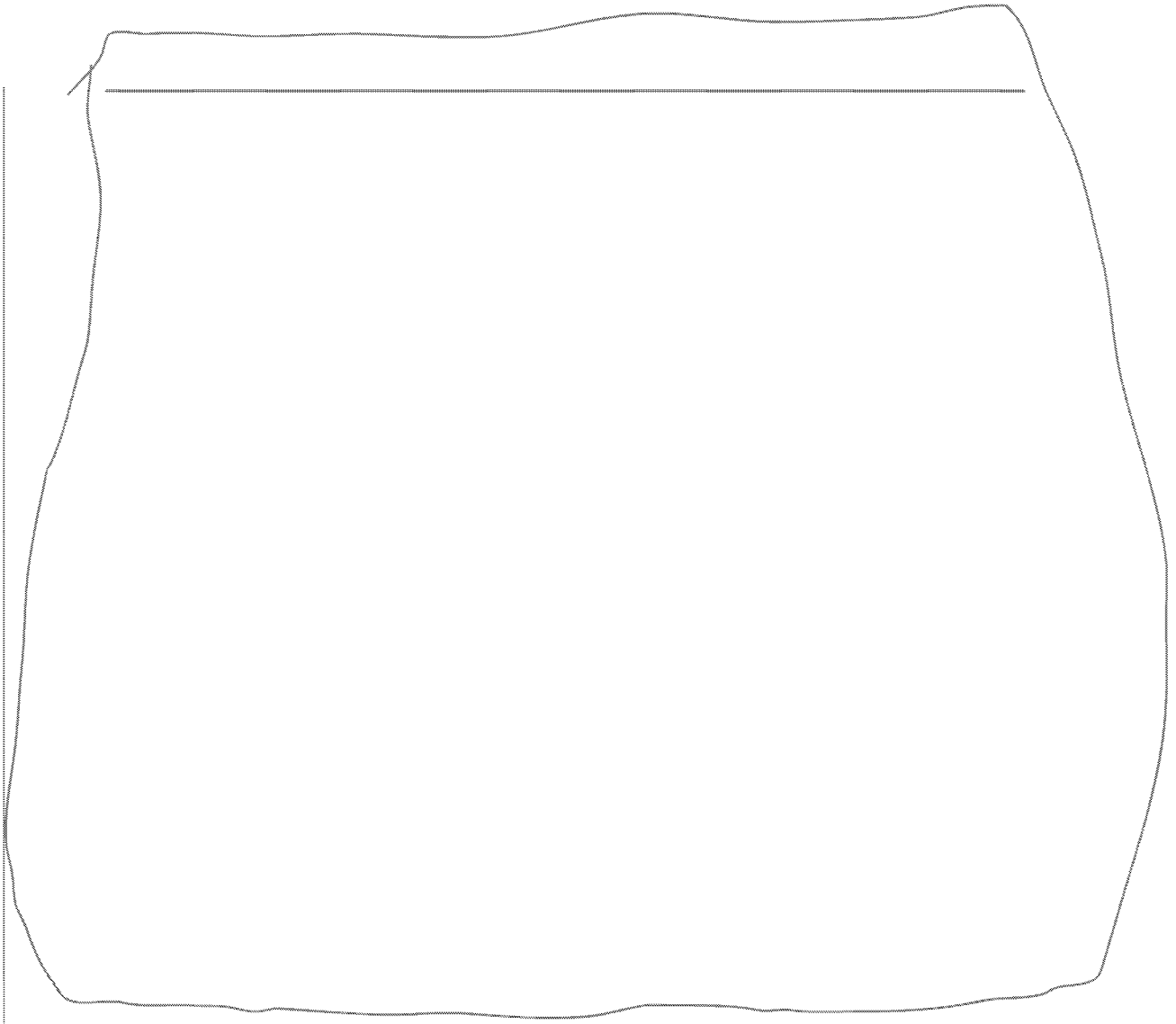
Using the Action Column (continued)



8. **Other:** You will be presented with the following Action Window.
    - Click the *Other* checkbox.
    - Ensure the correct line of business is selected from the drop-down menu.
    - Once your desired actions have been entered *click Save Action & Notes*

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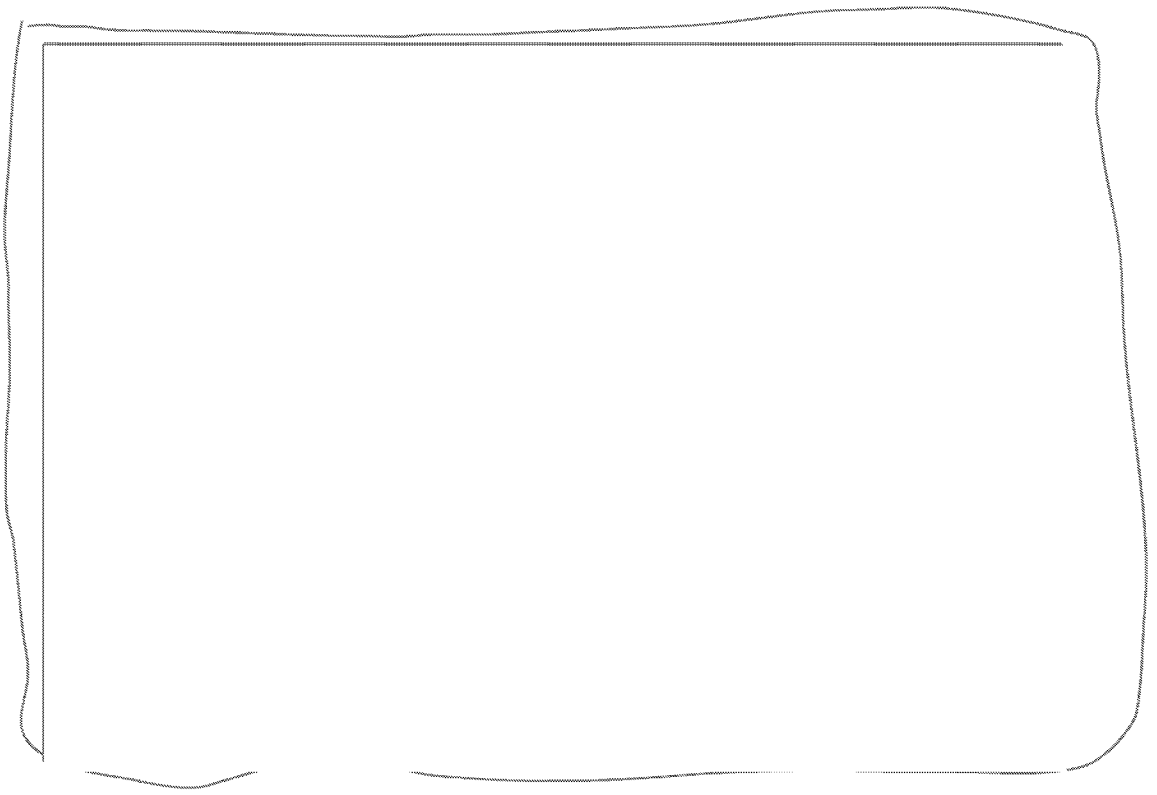
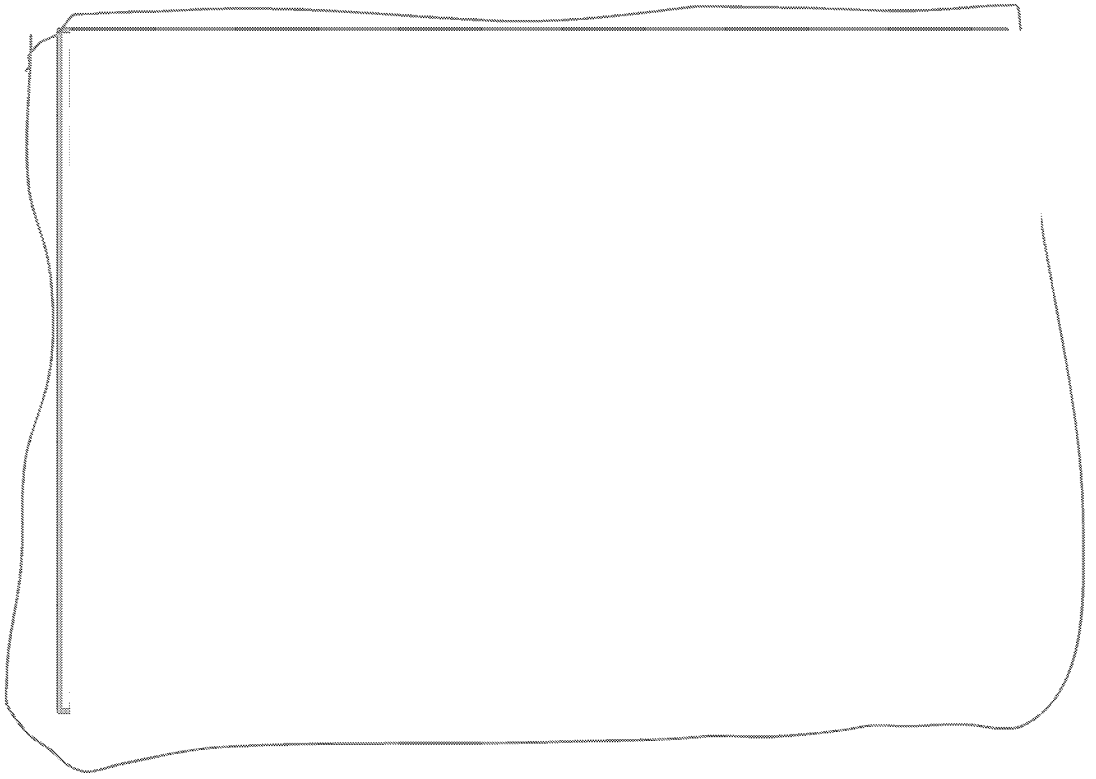
Using the Action Column (continued)



9. **Withdrawal:** You will be presented with the following Action Window.
   - Click the *Other* checkbox.
   - Ensure the correct line of business is selected from the drop-down menu.
   - Once your desired actions have been entered *click Save Action & Notes*



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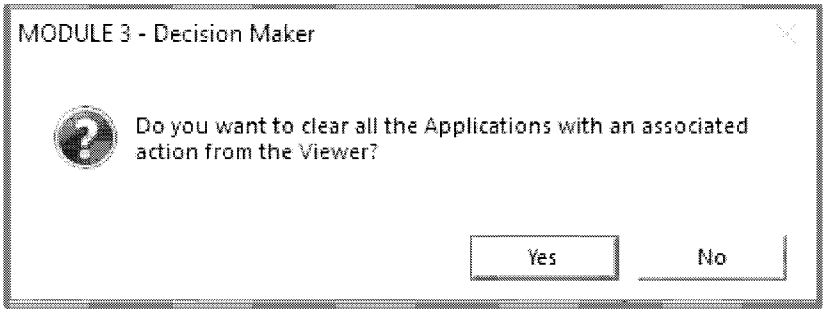
Creating Action Lists

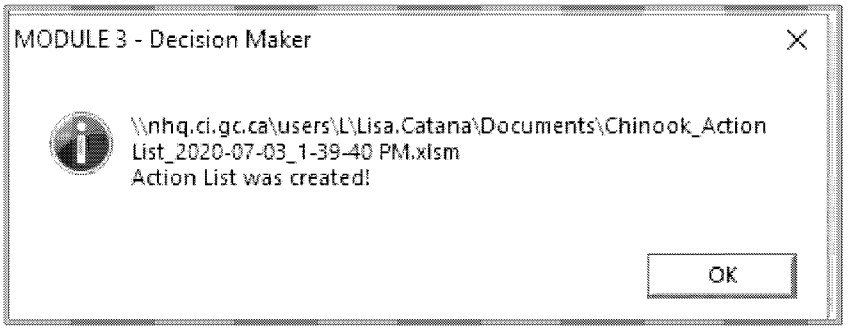
Using the Action List Button

1. After completing review of applications and entering intended actions – click the *Action List* button. This will compile a series of application lists and query strings to facilitate batch processing in GCMS. Any working notes that you have indicated will also be carried over to the lists. A separate list will be created for each Action as follows:
   - Approvals
   - Withdrawals
   - Other (one list for each group of applications with the same action)
   - Refusals (one list for each group of applications with the same refusal grounds)
   - No Action: list of files where no action was indicated

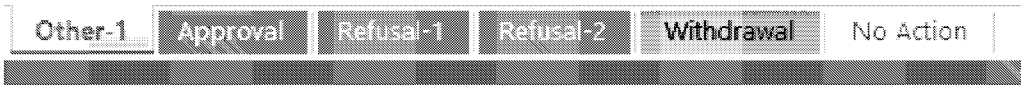
2. After clicking the **Action list button**, a pop-up will appear to confirm if you would like to have the applications removed from the Decision Maker module.
   - Click *YES* to keep all applications listed in your Module 3 session
   - Click *NO* to remove the completed applications from your Module 3 session.



3. Once you have clicked either *YES* or *NO*, the following pop-up will appear to inform you that the actions lists have been created. Click *OK*



4. A new worksheet will automatically open for the action lists. Each tab of the worksheet will represent a different action:



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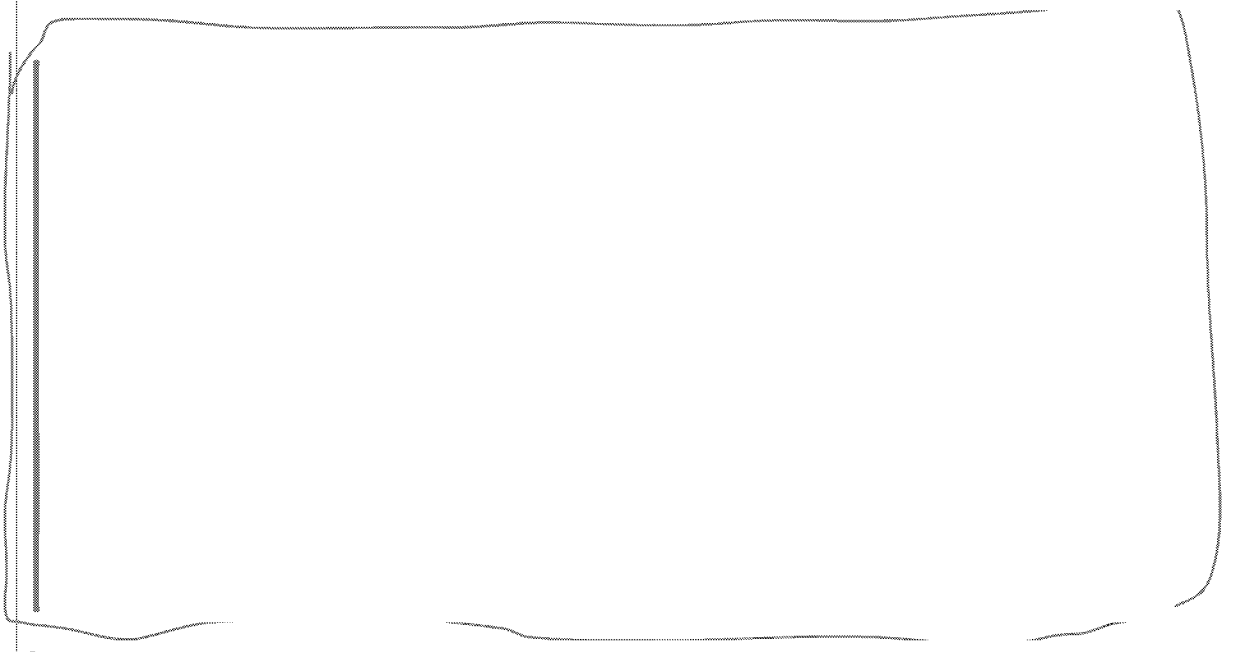
Refusal Action Lists

4.

5.



6.

7.

Other Action Lists

8.

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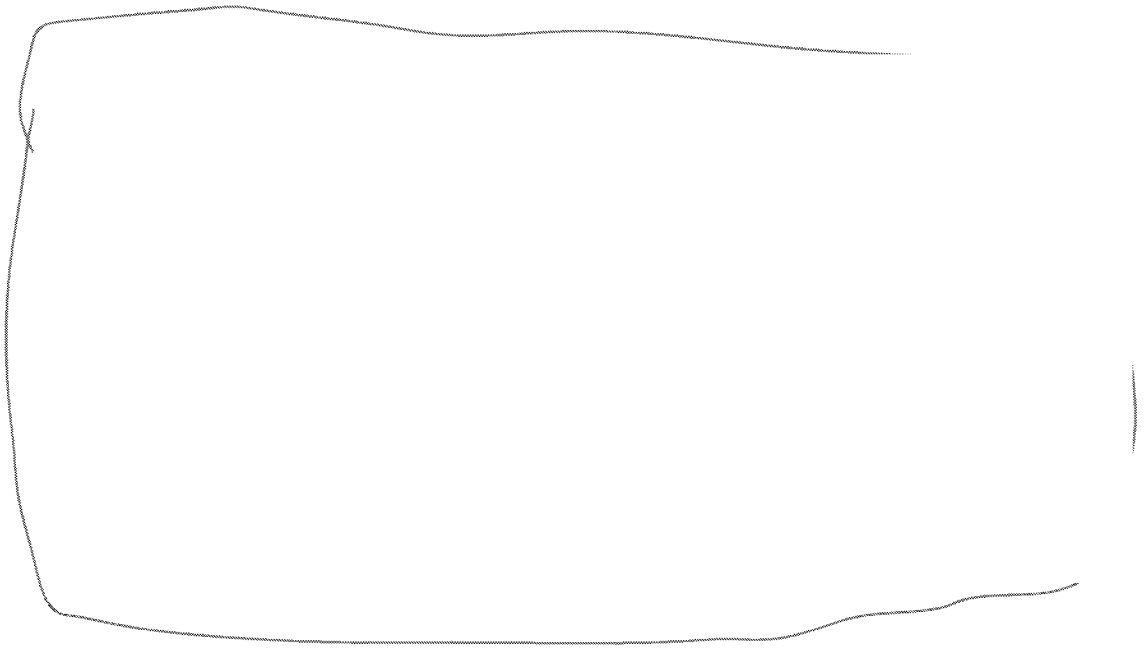
Other Action Lists (continued)



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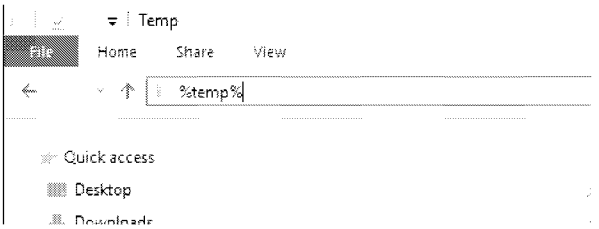
Autosave Feature

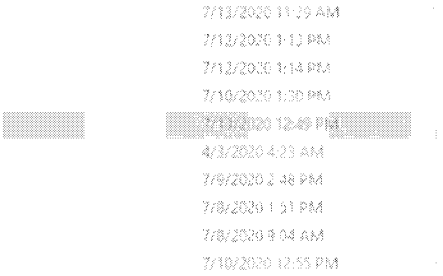
Retrieving Autosaved Action List

Chinook Module 3 generates and saves automatically an Action List every 15 minutes in the user's temporary folder. This feature was developed to avoid losing all the work done in the event of an unexpected crash.

To retrieve the autosaved Action List, open your user temporary folder by typing %temp% in a "Windows Explorer" window and pressing "Enter":



Then look for the file "Chinook_ActionList_AutoSave.xlsm" and open it.



Once the file is opened, you will see the actions that you had already entered in the "Action" column at the time the last autosave was done. You can then use the file lists to enter your decisions in GCMS and to keep working in Module 3.

Note that this file is replaced every time it is saved, every 15 minutes. That means that if you want to keep a copy of the files as they were after a crash, you will need to save it in another location.

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Best Practices for Paper Applications

Processing Paper Applications in Chinook

1.

2.

3.

4.

5.

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CHINOOK

1 File Management
2 Pre-Assessment
3 Decision Maker
4 Decision
5 Submit Team
6 Quality Assurance
7 ToolBox

USER's GUIDE - Module 2

V14.1

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Revisionist History

Draft Version	Description	Date	Author
Draft v0	Description and detailed instructions of how to use new Chinook + and GCMS Chinook Tab (Stage 2 of Rollout)	27FEB2020	Lisa Catana
v1	Amendments to Biometrics Logic	10MAR2020	
v2	Amendments to Logic Inclusion of SP/WP/EXT functionality	27APR2020	Lisa Catana
V3	Minor edits	18JAN2021	Zal Karkaria

Contact

For any questions and/or comments relating to Chinook + or the GCMS Chinook Tab, please contact the TRV Journey Lab – Officer Team at the following email:

IRCC.JL.Officer-JL.Officier.IRCC@cic.gc.ca

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New tools at a glance

The TRV Journey Lab has recently created new features in Chinook and GCMS to help improve the decision-maker experience while processing TR applications.

Several features have been built to create a link between Chinook and GCMS, which will now allow decision-makers to:

1. **Automate Final Decision Administrative tasks:**
   Using the new tools, decision-makers can now automate tasks that were previously done manually such as:
   - Final Decision entry,
   - Pasting notes from Chinook into Notes Tab
   - Entry of refusal grounds
   - Generation and sending of passport request/refusal letters
   - Generating counterfoils
   - Setting counterfoil print queue
   - Modifying SP/WP Permit Details

2.

3. **Automate Biometrics Administrative tasks:**
   Decision-makers can now indicate their Biometrics decision in Chinook, and the entry will be automated in GCMS

To take advantage of the new features, you will need access to two new tools:

Tool	Description
Chinook +	▪ New version of Chinook that includes new functionality including: o New Biometrics Action column o New functions in Action column o Export to GCMS button o Support for TRV/SP/WP/SP-EXTs
GCMS – Chinook Tab	▪ New Chinook Tab in GCMS that allows users to input data directly from Chinook then automates associated administrative tasks for final decisions and biometrics ▪ Support for SP/WP/SP-EXTs as of JUNE 2020 with GCMS Release 23 ▪ Restricted Access: During the testing/rollout phase, the Chinook Tab will only be visible to users participating in the testing. Once full rollout is complete, the Chinook Tab will be added as a default for all GCMS Users with Visa Officer responsibility

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Set up and get started

Prepare Chinook +

1. Open *ChinookPlus – Module 3 – Viewer.xlsb*

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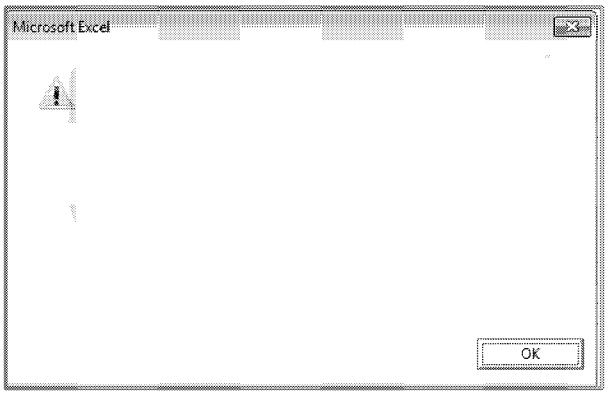
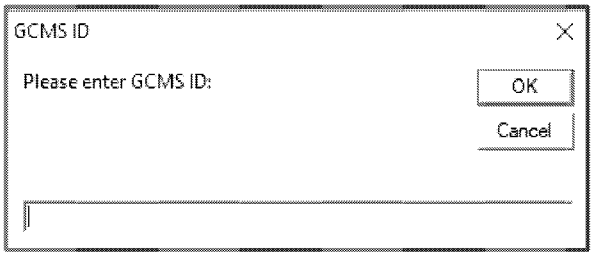
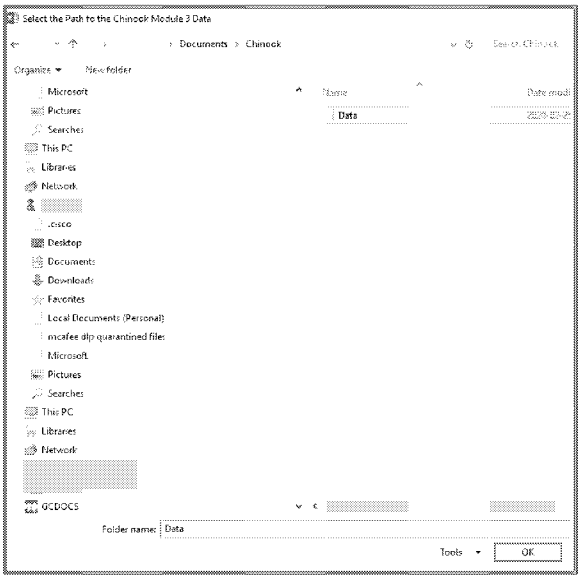
2. Read the Disclosure dialogue box and click *OK*



3. **Enter your GCMS ID:** When prompted, enter your GCMS ID
NOTE: you must enter a GCMS ID to use Chinook+ with the GCMS Chinook Tab).



4. **Set your data path:** If data path is not already set up, navigate to the *Chinook>Data* folder on your computer and click *OK*.



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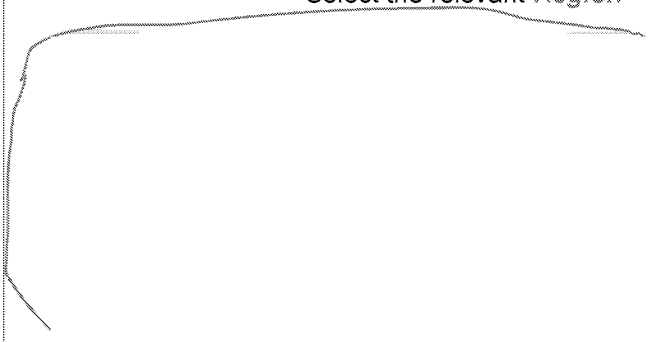
Prepare Chinook + (continued)

5. Ensure that the Data folder contains the following files:
   - Mod 3
   - Mod 5
   - Schema
   - REGION NAME – Mod 3 – Cols
   - REGION NAME – Mod 3 – Hist
   - *(NEW)* Chinook – Mod 3-Biometrics Ready
   - *(NEW)* Chinook – Mod 3-Biometrics Roll Up

6. **Set up your Selected Region and GCMS ID:**
   1. Click on the *Settings* button
   2. Under the User Info window:
      - Select the relevant *Region*



NOTE: The GCMS ID used in Chinook+ must match the GCMS ID of the user, when using the Chinook Tab in GCMS.

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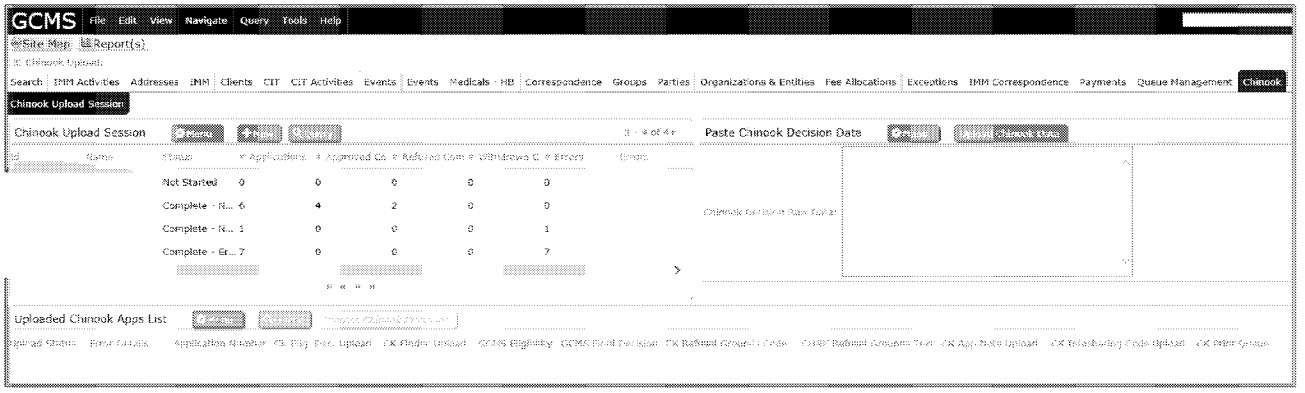
Prepare Chinook Tab

7. Open a new session of GCMS
8. Click on the new *Chinook Tab*
9. If not visible in your tabs, navigate to *Site Map>Chinook* and select *Chinook*

NOTE: The Chinook Tab is currently restricted only to officers involved in the testing. Once the new tools are fully tested and rolled out to all missions, the Chinook Tab will be available to all GCMS users with Visa Officer responsibility.

Chinook Tab layout



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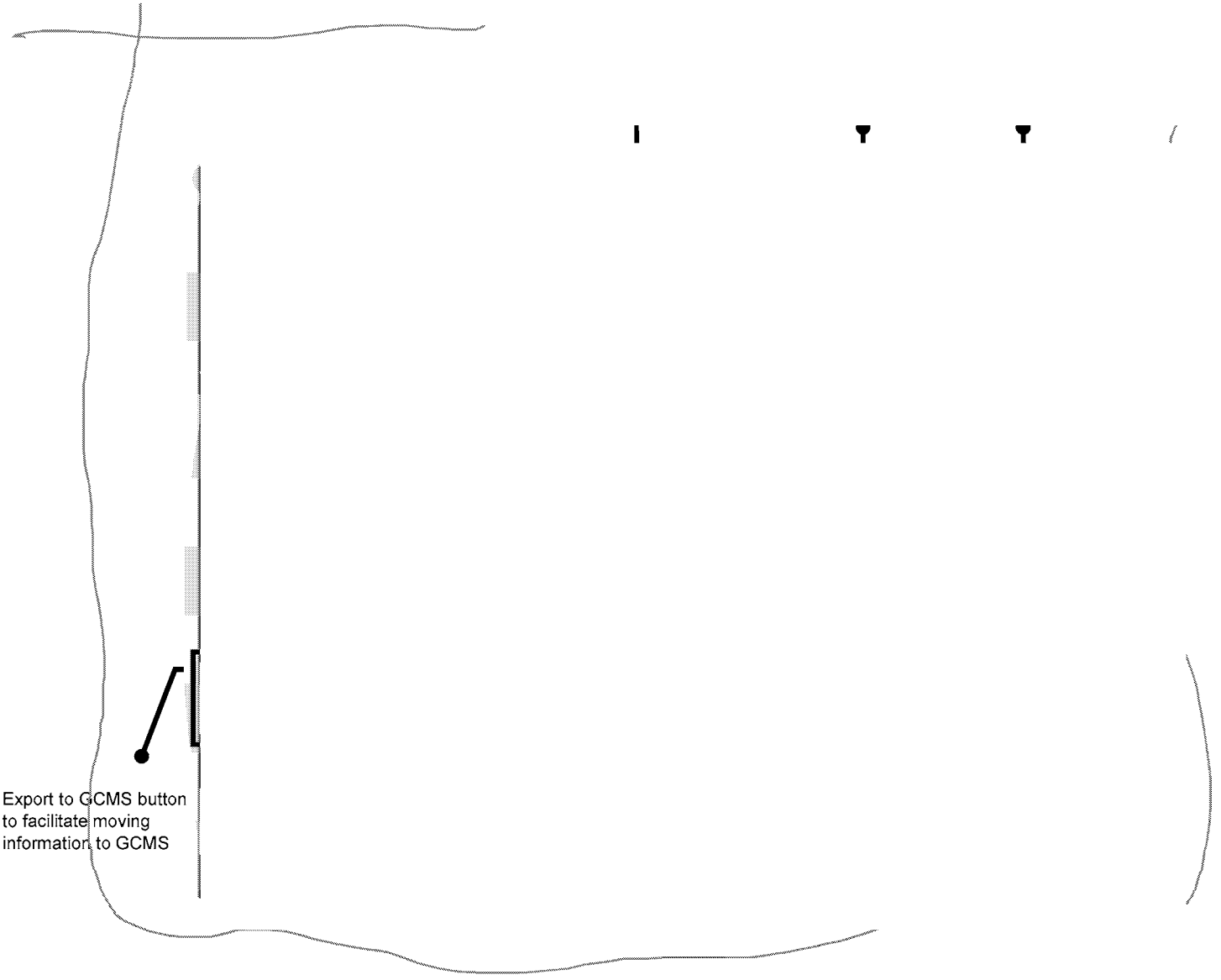
Chinook+ :: What's New



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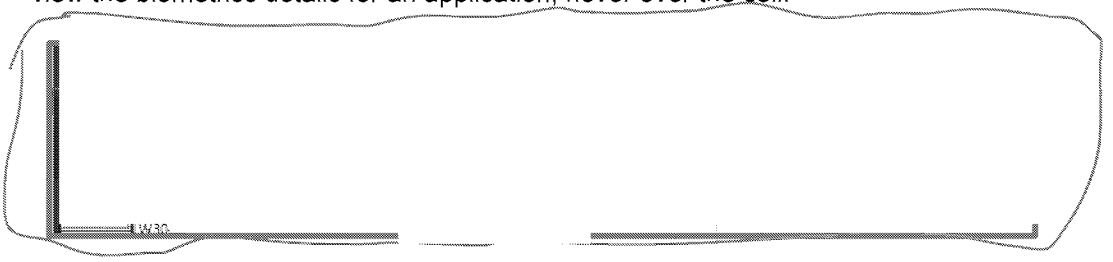
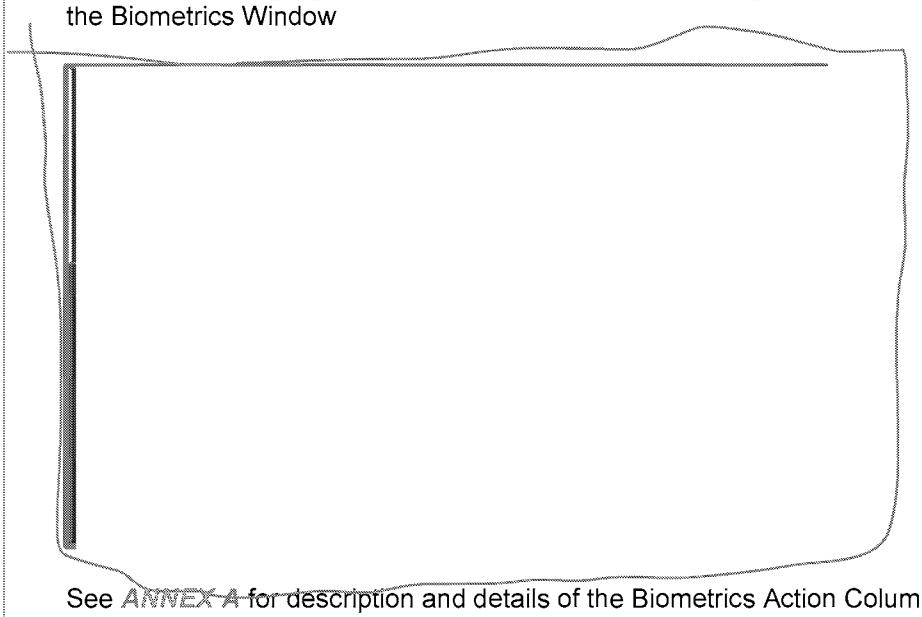
Using the new Biometrics Action column

1. **Hover over feature:** Hover over any cell in the Biometric Action column to quickly view the biometrics details for an application, hover over the cell.



2. **To view the Biometrics Window for a single application**: Highlight the Biometrics Action cell corresponding to an application to launch the Biometrics Window.

3. **To view the Biometrics Window for a multiple applications:** In the Biometrics Action column, highlight multiple cells for the corresponding applications to launch the Biometrics Window



See *ANNEX A* for description and details of the Biometrics Action Column Statuses.

4. **Biometrics Window:** Use the << & >> buttons to toggle through your selected applications. The Application # and Record count will change as you toggle through the applications.

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Using the new Biometrics Action column (continued)

8. When you have completed the biometrics assessments for the application(s), click the *Save Biometric Action* button to ensure that your assessments are saved and included in the Export to GCMS.

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Using the new features in the Action Window

9. **Approvals: Counterfoil Details (For all LOBs)**

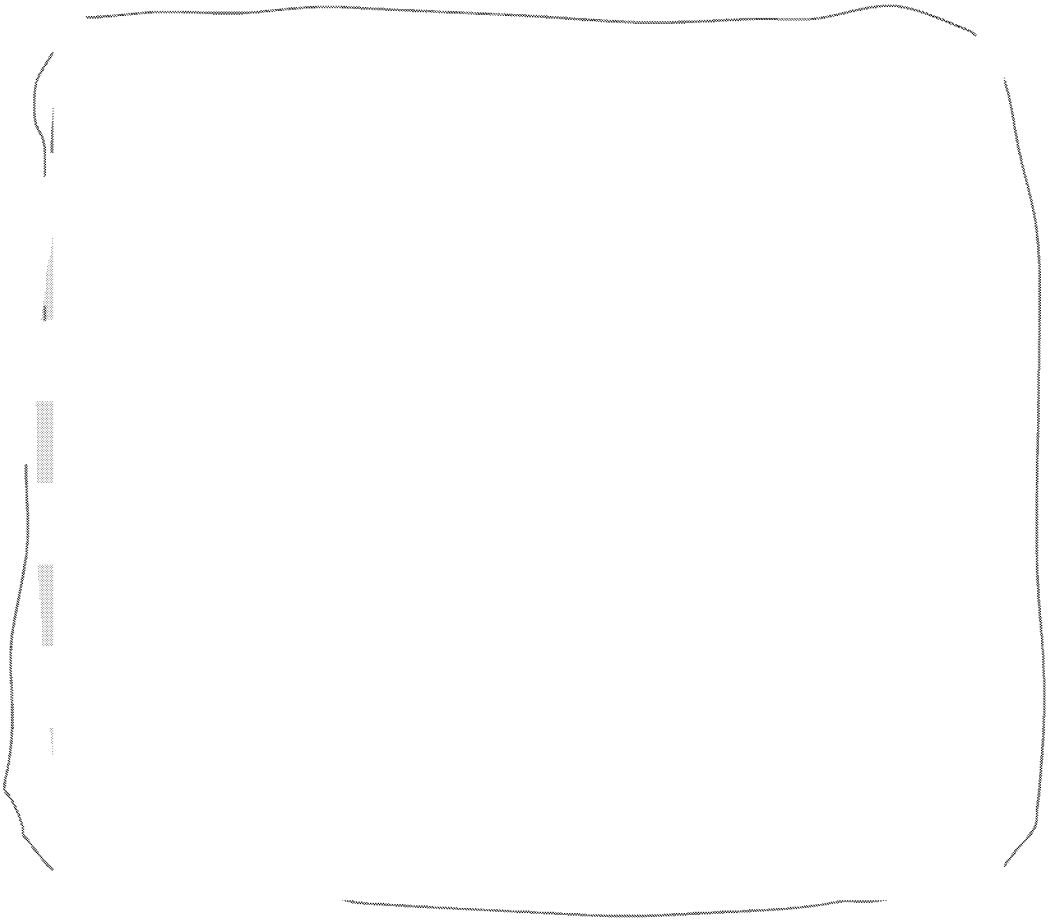
If the Approval checkbox is selected in the Action Window, decision-makers will now be able to select the following details from the *Action Window*. *NOTE:* If any of these fields are not entered in Chinook, then existing GCMS defaults will be followed.

Counterfoil Print Queue:

- Select your Office from the *Office* dropdown menu
- Select your desired *Counterfoil Print Queue* from the second dropdown (which will show a list of Print Queues associated to the selected office).
- *NOTE:* If no Print Queue is selected, your GCMS default print queue will be used once you have entered information in the Chinook Tab.

Counterfoil Validity Date:

- Click on the *Date* button to launch the calendar window and select a date.



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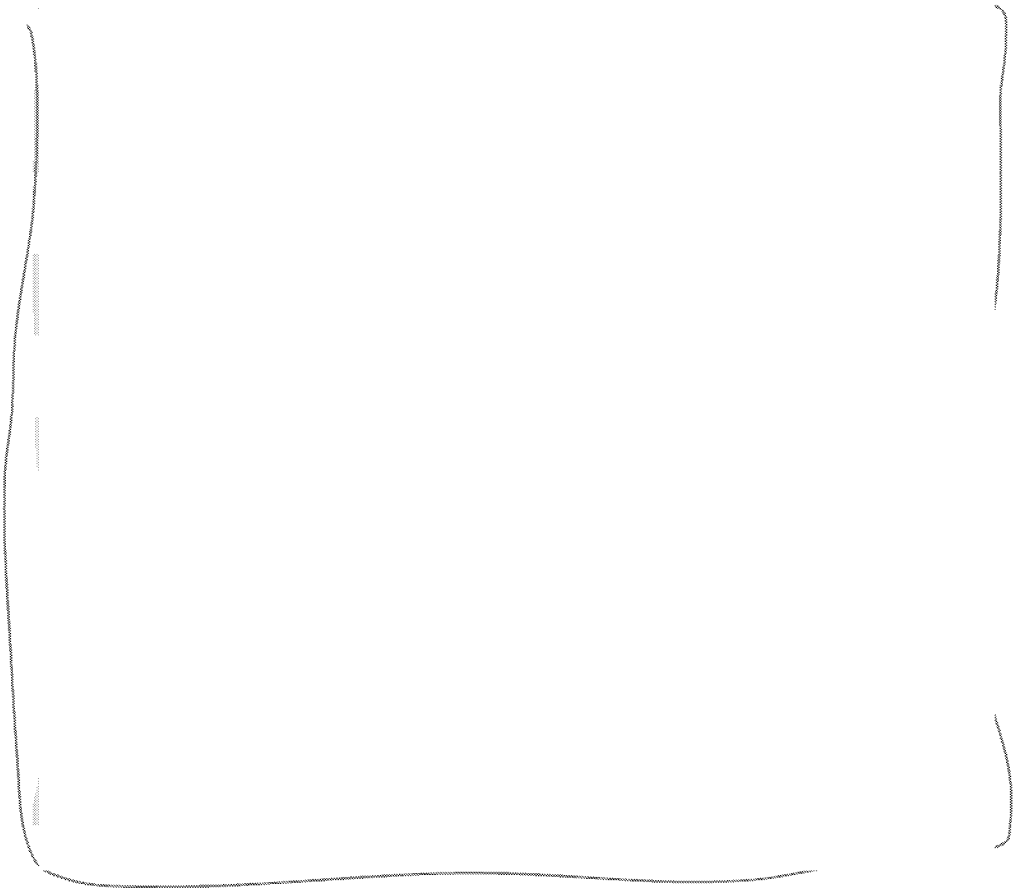
Using the new features in the Action Window (continued)

10. **Approvals: Permit Details (For SP, WP, SP-EXT and WP-EXT)**
For SP, WP, SP-EXT and WP-EXT approvals, , additional fields will appear in the Action Window:

- **Permit Validity Date:**
Click on the *Date* button to launch the calendar window and select a date.

- **Remarks**:
Enter relevant remarks in the Remarks window as required.



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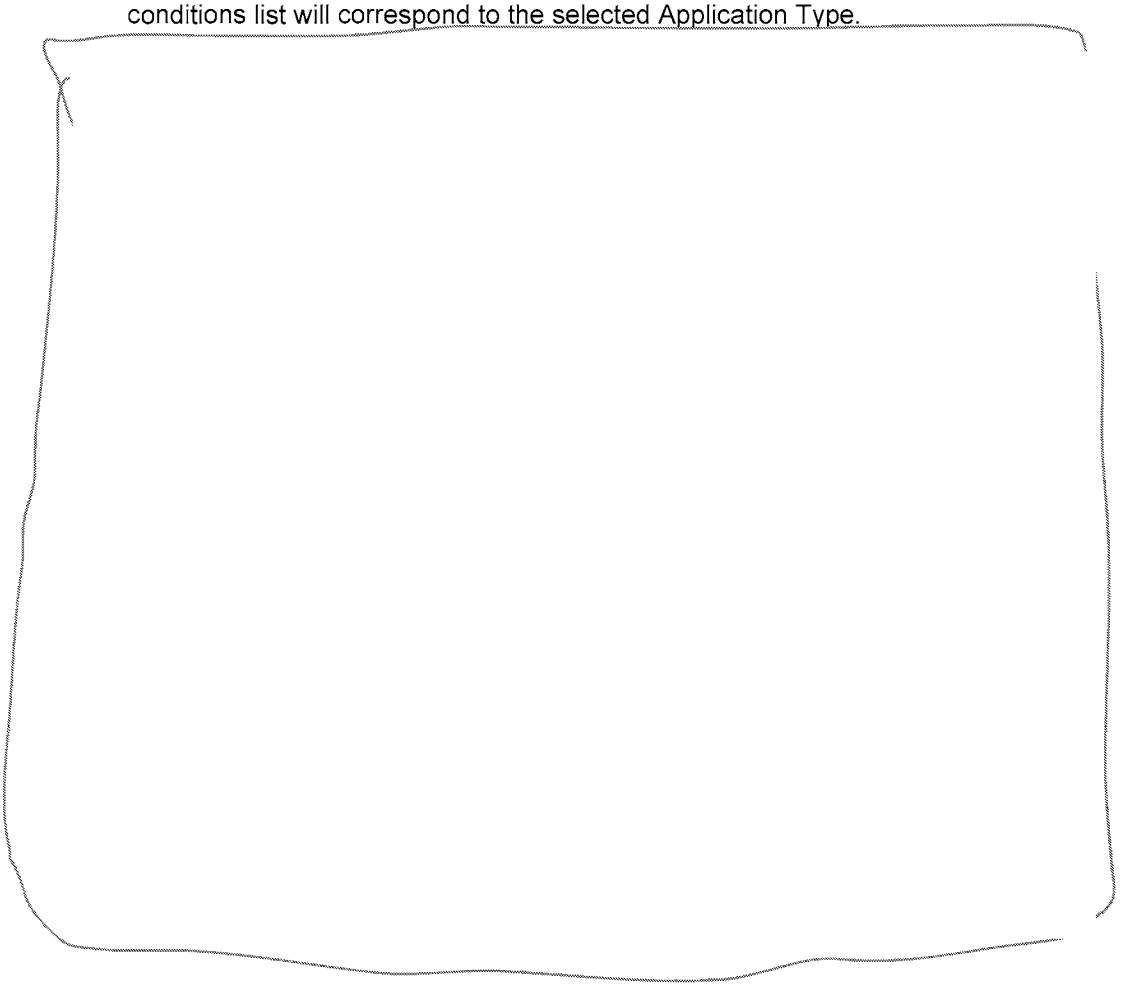
Using the new features in the Action Window (continued)

- **Conditions**:
  To select Permit Conditions – click on the *Approvals 2* tab in the Action Window and select the conditions that apply for the application. The conditions list will correspond to the selected Application Type.



11. **Refusals:**

- **Generate Refusal Letter Checkbox:**
  If the refusal checkbox is selected in the Action Window, the Generate Refusal Letter Checkbox will be checked as a default.

  If a refusal decision is exported to GCMS using the Export to GCMS button, a refusal letter will automatically be generated in GCMS based on the exported refusal grounds.

  Unchecking the box will stop the refusal letter from being automatically generated. This will allow additional edits or amendments to the refusal letter (i.e. adding comments for an "Other" refusal ground etc.

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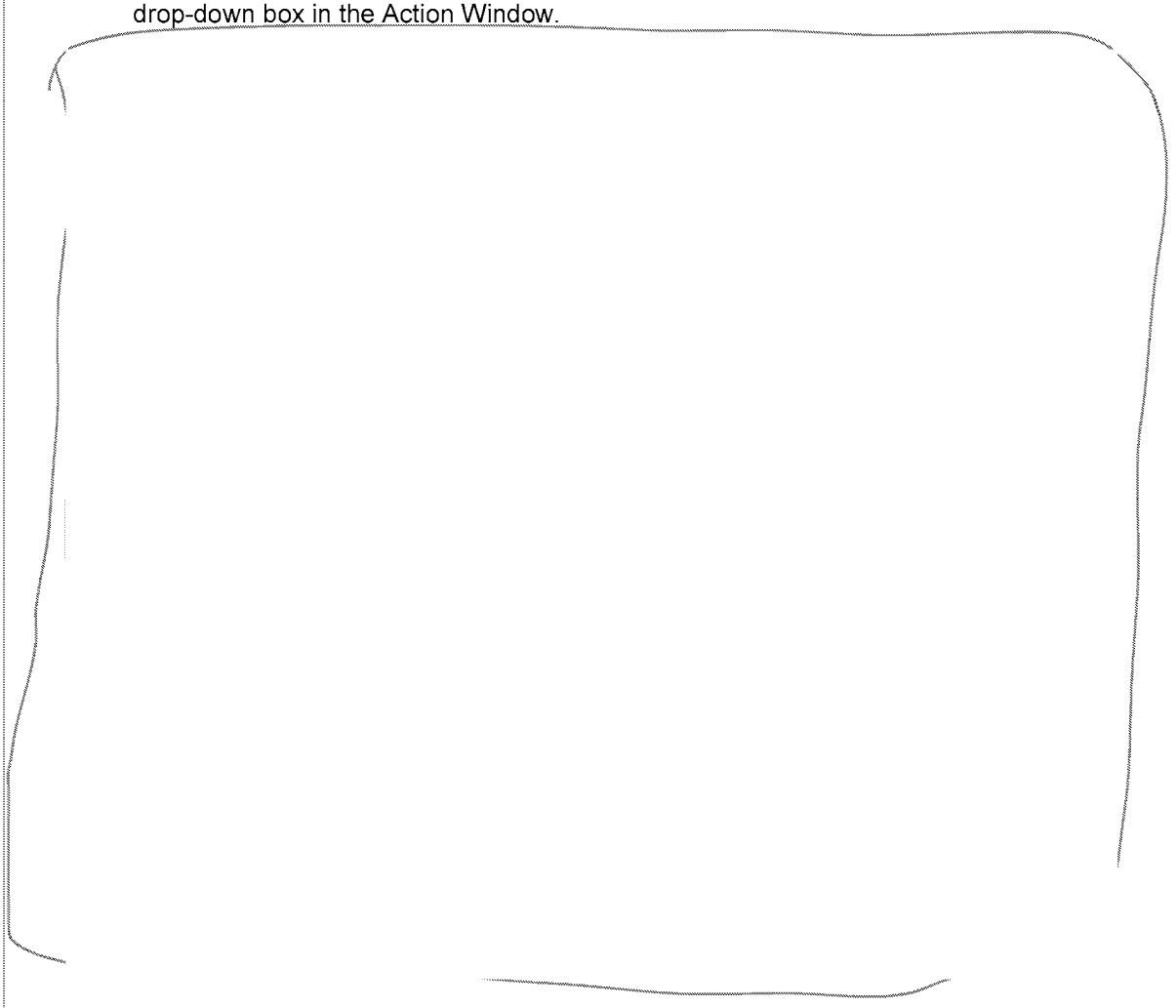
Using the new features in the Action Window (continued)

- **Refusal Letter Intros:**
  For SP, WP, SP-EXT, WP-EXT, select the *Refusal Letter Intro* type from the drop-down box in the Action Window.



Using the new Export to GCMS button

12. The new Export to GCMS button can be used in lieu of the Action List button. Once clicked, the button will copy instructions for GCMS onto your clipboard that can then be pasted directly into the GCMS Chinook Tab to perform the final decision administrative actions that typically would have been done manually. These actions are the following **(See Annex B & C for full details of actions completed in GCMS, including logic**):

    - Final Decision entry
    - Biometrics FCC Detail Assessments
    - Pasting notes from Chinook into Notes Tab
    - Entry of refusal grounds
    - Generation and sending of passport request/refusal letters
    - Generating counterfoils
    - Setting Counterfoil Print Queue
    - Setting Counterfoil Validity Date
    - Setting Permit Validity Date (SP/WP/SP-EXT/WP-EXT only)
    - Setting Conditions & Remarks (SP/WP/SP-EXT/WP-EXT only)

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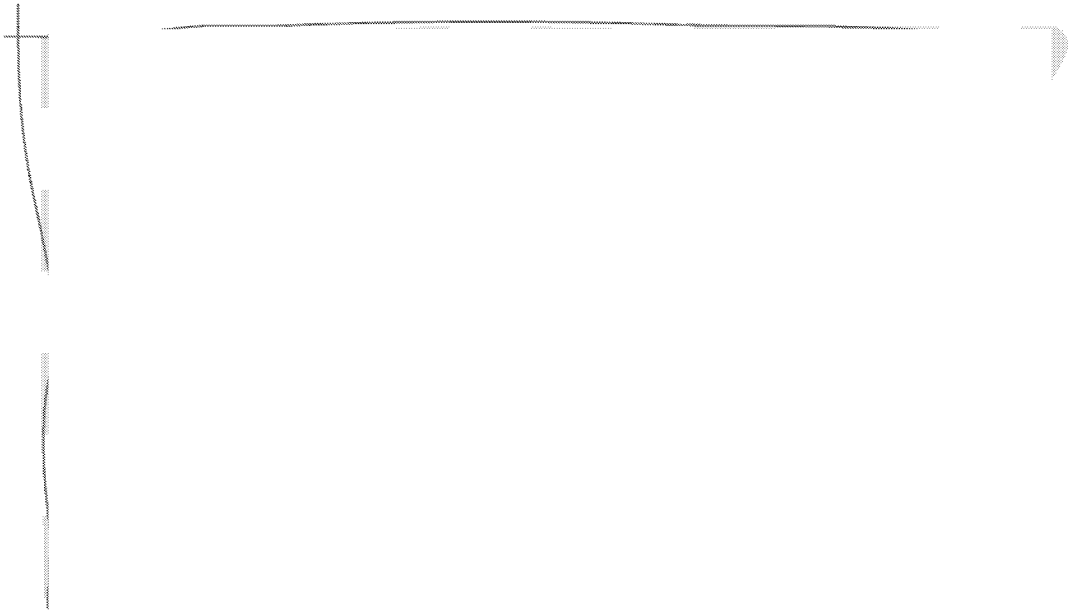
Using the new Export to GCMS button (continued)

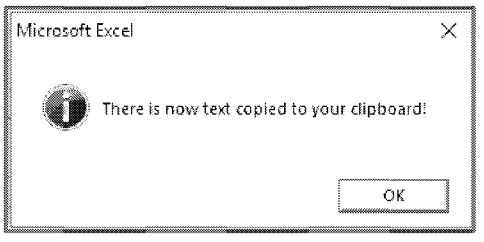
NOTE: All actions that are automated in GCMS, will be tagged in GCMS against the user's GCMS ID.

13. To use new Export to GCMS: Once decisions have been entered in the Action column, click on the Export to GCMS button.

    NOTE: Applications that have "Other" in the Action column OR Applications that have already been Sent to GCMS will not be exported for decision.



14. The following window will pop up to confirm that the Export has been copied to your clipboard.



15. Navigate directly to the GCMS Chinook Tab to paste the information into GCMS. (see Chinook Tab instructions below).

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Sent to GCMS

16. Once an application's information has been Exported to GCMS, a checkmark will appear in the "Sent To GCMS" column.

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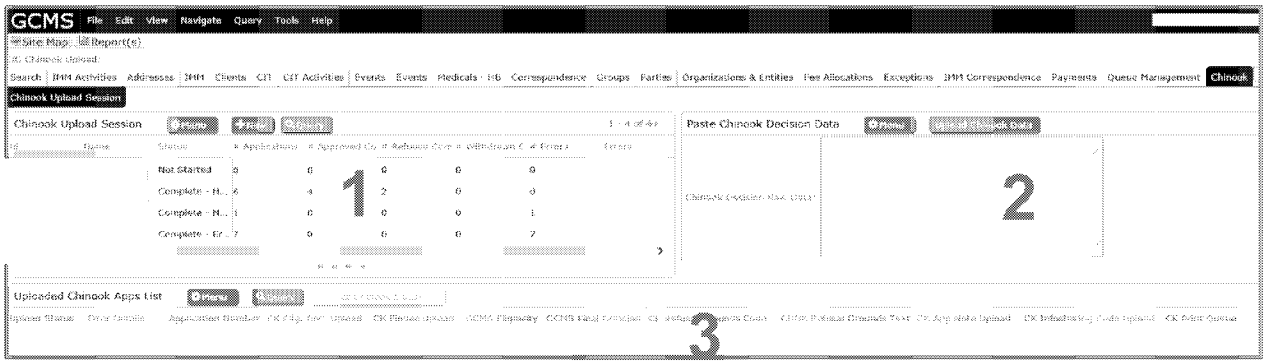
GCMS Chinook Tab :: It's All New



Basics

Quick basics about the Chinook Tab:

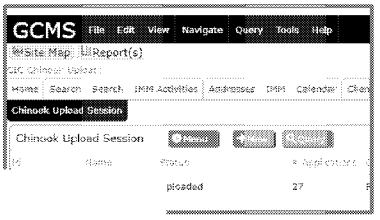
- Decisions entered in the Chinook Tab, will never overwrite existing decisions in Chinook (including Eligibility and Findecs)
- Any application processed in the Chinook tab will always be tagged to the Chinook Session ID – so it can be queried at a future time.
- All Chinook Tab data will be available via Answers Queries Errors that typically prevent applications from being finalized (i.e. Cost Recovery fee outstanding, Biometrics not assessed, open Criminality/Security assessments or Verifications etc) will continue to be returned in the Chinook Tab.

There are three sections to the new Chinook Tab:

1. **Chinook Upload Session**
   - To Create new Chinook Upload Session (much like creating a group)
2. **Paste Chinook Decision Data**
   - Paste data here after clicking "Export to GCMS" button in Chinook
3. **Uploaded Chinook Apps List**
   - Review uploaded Chinook Application information

Creating a new Chinook Session

1. Before pasting information from the Export to GCMS Chinook button, a new Chinook Session must be created.
2. In the Chinook Upload Session window, click *New* button



3. **Session ID:** A new Chinook Session ID # will appear in the ID column
4. **Name:** The Session name can be edited in the name column. The name will default to the Session ID if not modified by the user

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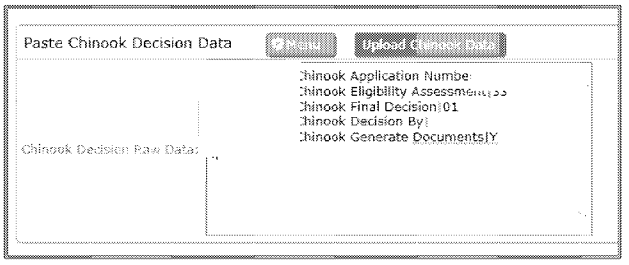
Pasting Chinook Data into Chinook Tab

5. In the *Paste Chinook Decision Data* section of the tab, paste (CTRL+V) your data from the *Export to GCMS* button in Chinook.



NOTE: A "$" sign will appear at the end of the pasted Chinook information. This indicates the end of the information. Do not hit enter, or enter any other characters after this $ - it will cause an error.

6. Click the *Upload Chinook Data* button to review your application information.

NOTE: **This will not process the decisions**, it will pull the Chinook decision information into the Uploaded Chinook Data list for review.

Review Uploaded Chinook Apps List

7. The application information entered in Chinook will appear in the Uploaded Chinook Data window:

8. The following information can be reviewed in the relevant columns:

Column Title	Description

Upload Chinook Apps List Columns:

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Using the Process Chinook Data button

9. Once applications have been reviewed – click the *Process Chinook Decisions* to complete the final decision activities for the applications.

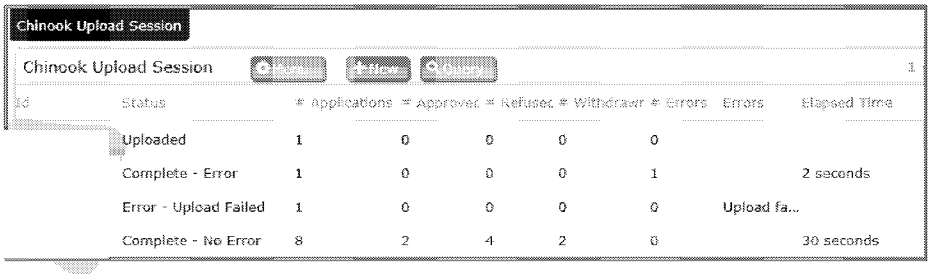
NOTE: Depending on the number of applications being processed, the delay may be several minutes. **The buffer wheel will only appear for 90seconds and then will disappear. This does not mean that the processing has crashed.** Status will change to Complete or Complete- Error once processing is done.

SUGGESTIONS:

- Do not process more than 25 applications at a time.
- Continue review of remaining applications in Chinook while you wait for the Chinook Tab to finish processing.

Upload Statuses & Summaries

The Chinook Upload Session status will indicate the processing status of the group of applications in that session.



Column Title	Description

The Chinook Upload Session window also provides a summary of the # Apps, # Approved, # Withdrawn, # Refused, # Errors as well as the elapsed time for each complete session.

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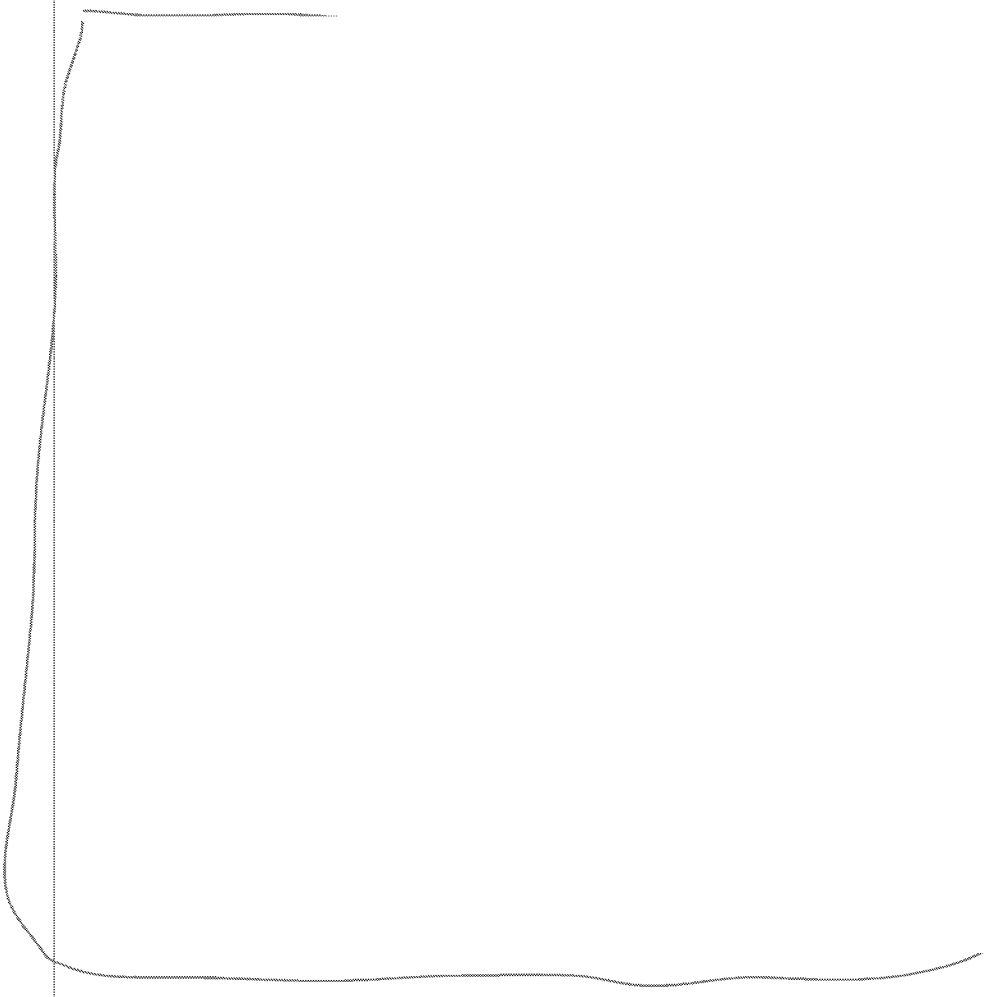
Application Error Statuses

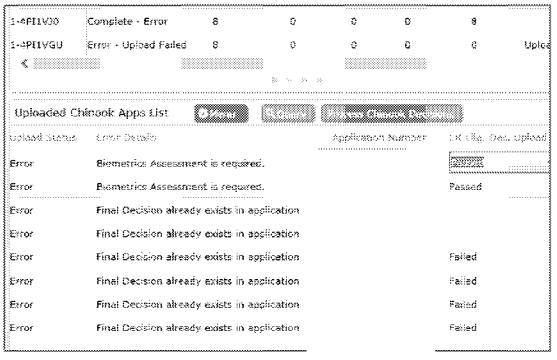
As mentioned above, errors typically returned to a user to indicate that the application cannot be finalized, will still appear in the Chinook Tab under Application Error Status.

There are several new errors listed below that are specific to the Chinook Tab:



Fixing Application Errors

10. Should an error occur on an application, click on the Application Number hyperlink.



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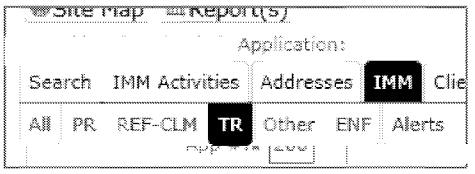
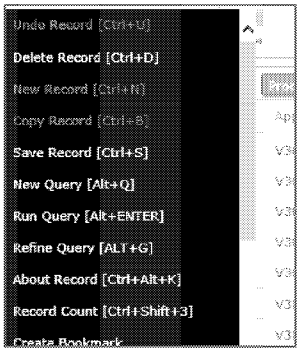
11. Fix the error, if possible and use the breadcrumb to return to the Chinook Session Tab.



Deleting Applications from a Session

12. Click the Process Chinook Decisions button, and all applications that are not at *Status= Complete* will be re-processed.

13. To delete an application from a Session, highlight the application(s) and click *Menu>Delete Record*.



A4118300_109-000110

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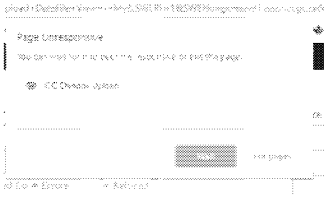
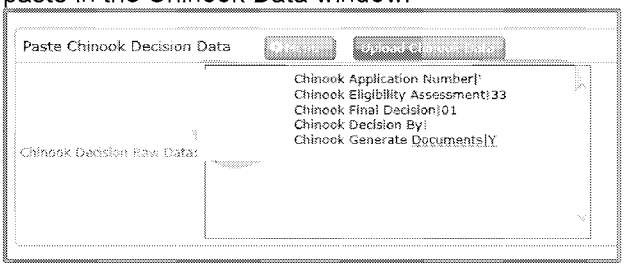
Troubleshooting

The Chinook+ and Chinook Tab are new and there may be bugs that have not been identified..

There are a few known issues that are identified below to assist with troubleshooting:

Issue	Workaround
The buffer wheel disappears and it looks like the Chinook session has crashed. OR Chrome gives me this Page Unresponsive message: 	In GCMS, the buffer wheel automatically disappears after 60-90second. Unfortunately, this isn't something we could easily fix. So **trust it and let it run** – the Session Status will change to Complete – No Error or Complete – Error once it's done. Do not click the Process button again as this will actually make it crash.
When I paste my information from Chinook into the Chinook Raw Data window, I see a $ and then some other symbols: Ex: V1|Chinook Application Number|V1 V1|Chinook Eligibility Assessment|33 V1|Chinook Final Decision|01 V1|Chinook Decision By| V1|Chinook Generate Documents|Y $ >p	To avoid errors in the Chinook Tab, ensure that there are no extra characters or spaces after you paste in the Chinook Data window:  Delete all extra characters and spaces after the $.

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NOTE: The detailed information for this record will not be provided in Chinook. Decision-Maker will be required to review information in GCMS and the Biometrics Assessment checkboxes for this application will be disabled in Chinook.

USA pending **NZL Pending** **AUS pending** **USA/NZL/AUS pending** **USA/NZL pending** **USA/AUS pending** **NZL/AUS pending**	Additional Info – see GCMS
COMPLETE (COUNTRY) *OR* **ALL COMPLETE**	COMPLETE
(COUNTRY) NRT *OR* **ALL NRT**	ALL NRT
EXEMPT (COUNTRY) *OR* **ALL EXEMPT**	ALL EXEMPT
INCOMPLETE FINGERPRINT (COUNTRY) *OR* **INCOMPLETE NOT STARTED** *OR* **ALL INCOMPLETE**	INCOMPLETE

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BIOMETRIC STATUSES THAT WILL APPEAR AFTER DECISION-MAKER REVIEW

REVIEWED	If the user has reviewed Biometrics and clicked on an assessment check box and "Save Biometrics Action" button
REVIEW REQUIRED	User has checked the "Review Required" box in the Biometrics Action Column

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ANNEX B

Final Decision Logic - TRV

	Activity/Field in GCMS	What happens in GCMS	Final Decision		
			Approval	Refusal	Withdrawal
Eligibility & Findec	Eligibility Assessment		Eligibility: Passed	Eligibility: Failed	Eligibility: (blank – unless already Passed or Failed)
	Final Assessment		Final Decision : Approved	Final Decision : Refused	Final Decision : Withdrawn
Notes	Notes tab		Yes	Yes	Yes
Refusal Grounds:	Finalize Application>Refusal Grounds		N/A	Yes	N/A
Correspondence:	Correspondence>Outgoing		Ppt Request ltr = Generate	Refusal Letter = Generate	No letter generated – cannot automate letters that have to be picked from the T:Drive
			Ppt Request ltr = Sent	Refusal Letter = Sent	
			Ppt Request ltr = Generate	Refusal Letter = Generate	
Counterfoil	Finalize Application> Document Issuance		Generate and set Print Queue	N/A	N/A
Things GCMS won't let us automate that you'll still have to do :			If Received Via Other/VAC = set letter to Sent Set Validity Date if change is required	If Received Via Other/VAC = set letter to Sent	Send withdrawal letter

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Final Decision Logic - SP

			Final Decision		
	Activity/Field in GCMS	What happens in GCMS	Approval	Refusal	Withdrawal
Eligibility & Findec	Eligibility Assessment		Eligibility: Passed	Eligibility: Failed	Eligibility: (blank – unless already Passed or Failed)
	Final Assessment		Final Decision : Approved	Final Decision : Refused	Final Decision : Withdrawn
Notes	Notes tab		Yes	Yes	Yes
Refusal Grounds:	Finalize Application>Refusal Grounds		N/A	Yes	N/A
Correspondence:	Correspondence>Outgoing		POE Intro Ltr = Generate Study Permit = Authorized	Refusal Letter = Generate	No letter generated – cannot automate letters that have to be picked from the T:Drive
			POE Intro Ltr = Generate Study Permit = Authorized Original Ppt Request = Sent	Refusal Letter = Sent	
			POE Intro Ltr = Generate Study Permit = Authorized Original Ppt Request = Generate	Refusal Letter = Generate	
Counterfoil	Finalize Application> Document Issuance		Generate and set Print Queue Set Validity Date Counterfoil = Generate eTA = Authorized	N/A	N/A
Permit	Finalize Application >Document Issuance>Type = Permit – SP		Set Validity Date User Remarks based on Chinook entry Conditions based on Chinook entry		
Things GCMS won't let us automate that you'll still have to do :			If Received Via Other/VAC = set letter to Sent	If Received Via Other/VAC = set letter to Sent	Send withdrawal letter

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Final Decision Logic – SP-EXT

	Activity/Field in GCMS	What happens in GCMS	Final Decision: Approval	Final Decision: Refusal	Final Decision: Withdrawal
Eligibility & Findec	Eligibility Assessment		Eligibility: Passed	Eligibility: Failed	Eligibility: (blank – unless already Passed or Failed)
	Final Assessment		Final Decision : Approved	Final Decision : Refused	Final Decision : Withdrawn
Notes	Notes tab		Yes	Yes	Yes
Refusal Grounds:	Finalize Application>Refusal Grounds Refusal Letter Details>Paragraph Type		N/A	Yes Refusal Letters Details> Paragraph Type based on Chinook entry	N/A
Correspondence:	Correspondence>Outgoing		Study Permit = Generate	Refusal Letter = Sent	No letter generated – cannot automate letters that have to be picked from the T:Drive
			Study Permit = Generate	Refusal Letter = Sent	
Counterfoil	Finalize Application> Document Issuance		Generate and set Print Queue Set Validity Date Counterfoil = Generate eTA = Authorized	N/A	N/A
Permit	Finalize Application >Document Issuance>Type = Permit – SP		Set Validity Date User Remarks based on Chinook entry Conditions based on Chinook entry	N/A	N/A
Things GCMS won't let us automate that you'll still have to do :			Set Study Permit to Authorized	N/A	Send withdrawal letter

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Things GCMS won't let us automate that you'll still have to do :		If Received Via Other/VAC = set letter to Sent	If Received Via Other/VAC = set letter to Sent	Send withdrawal letter

Final Decision Logic – WP-EXT

	Activity/Field in GCMS	What happens in GCMS	Final Decision: Approval	Final Decision: Refusal	Final Decision: Withdrawal
Eligibility & Findec	Eligibility Assessment		Eligibility: Passed	Eligibility: Failed	Eligibility: (blank – unless already Passed or Failed)
	Final Assessment		Final Decision : Approved	Final Decision : Refused	Final Decision : Withdrawn
Notes	Notes tab		Yes	Yes	Yes
Refusal Grounds:	Finalize Application>Refusal Grounds Refusal Letter Details>Paragraph Type		N/A	Yes Refusal Letters Details> Paragraph Type based on Chinook entry	N/A
Correspondence:	Correspondence>Outgoing		Work Permit = Generate	Refusal Letter = Generate	
			Work Permit = Generate	Refusal Letter = Sent	No letter generated – cannot automate letters that have to be picked from the T:Drive
			Work Permit = Generate	Refusal Letter = Generate	
Counterfoil	Finalize Application> Document Issuance		Generate and set Print Queue Set Validity Date Counterfoil = Generate eTA = Authorized	N/A	N/A
Permit	Finalize Application >Document Issuance>Type = Permit – WP-EXT		Set Validity Date	N/A	N/A
			User Remarks based on Chinook entry Conditions based on Chinook entry		
Things GCMS won't let us automate that you'll still have to do :			If Received Via Other/VAC = set letter to Sent	If Received Via Other/VAC = set letter to Sent	Send withdrawal letter

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ANNEX C

Eligibility Logic

Decision-Maker Entry in Chinook		What happens in GCMS		
If Chinook Final Decision =	**THEN Chinook Eligibility will be set to:**	**If Existing GCMS Eligibility =**	**THEN Chinook Tab will set GCMS Eligibility to:**	**THEN Error Message =**
Approved	Passed	Blank	Passed	n/a
		In Progress	Passed	n/a
		Not Started	Passed	n/a
		Recommend Interview	Passed	n/a
		Recommend Passed	Passed	n/a
		Review Required	Passed	n/a
		Passed	Will not overwrite existing Eligibility decision, but will continue with remaining Final Decision actions	n/a
		Not Met	No actions will be completed. Will return Error to Officer.	"Eligibility is Not Met"
		Failed	No actions will be completed. Will return Error to Officer	"Application's Final Assessment cannot be updated due to Eligibility Assessment value"
Refused	Failed	Blank	Failed	n/a
		In Progress	Failed	n/a
		Not Started	Failed	n/a
		Recommend Interview	Failed	n/a
		Recommend Passed	Failed	n/a
		Review Required	Failed	n/a
		Passed	No actions will be completed. Will return Error to Officer	"Application's Final Assessment cannot be updated due to Eligibility Assessment value"
		Not Met	Failed	
		Failed	Will not overwrite existing Eligibility decision, but will continue with remaining Final Decision actions	
Withdrawal	Blank	Blank	Blank	
		In Progress	Blank	
		Not Started	Blank	
		Recommend Interview	Blank	
		Recommend Passed	Blank	
		Review Required	Blank	
		Passed	Will not overwrite existing Eligibility decision, but will continue with remaining Final Decision actions	
		Not Met	No actions will be completed. Will return Error to Officer.	"Eligibility is Not Met"
		Failed	No actions will be completed. Will return Error to Officer.	"Eligibility is Failed"

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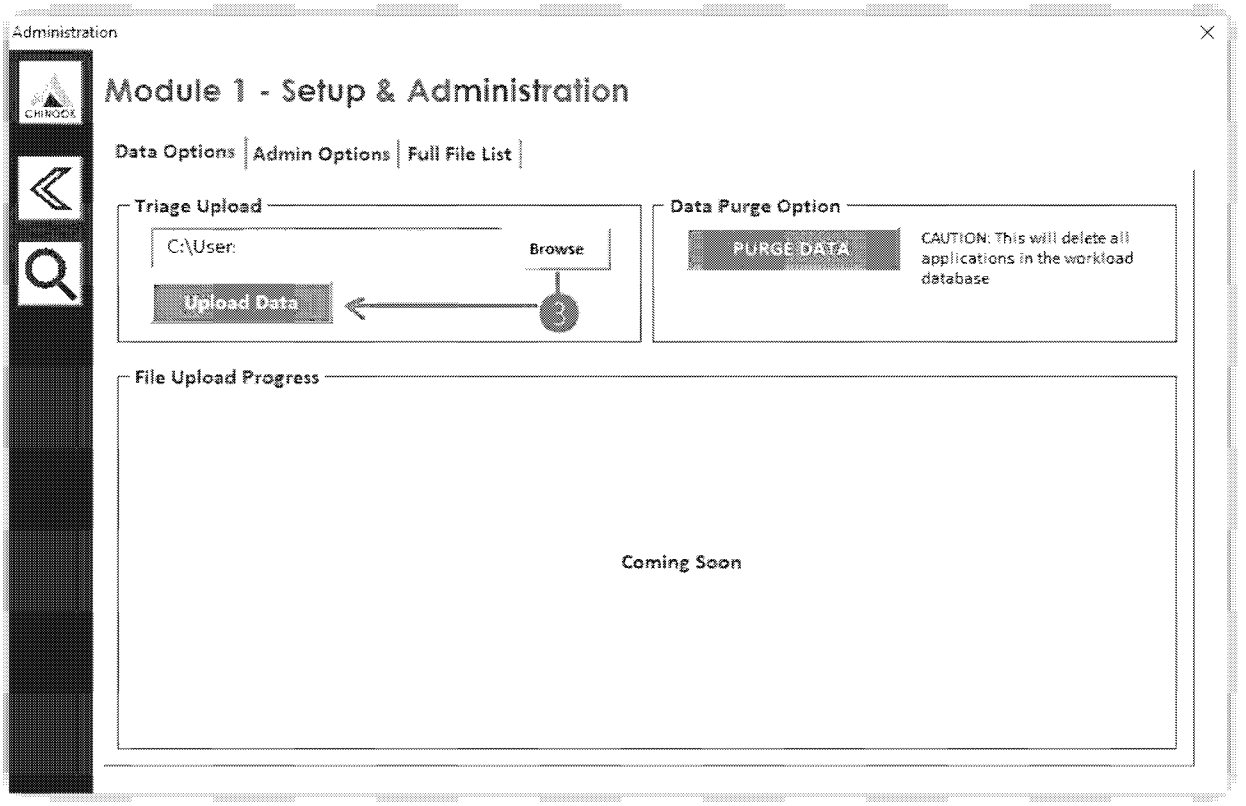
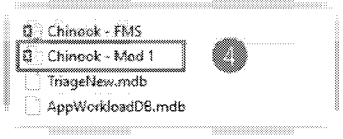
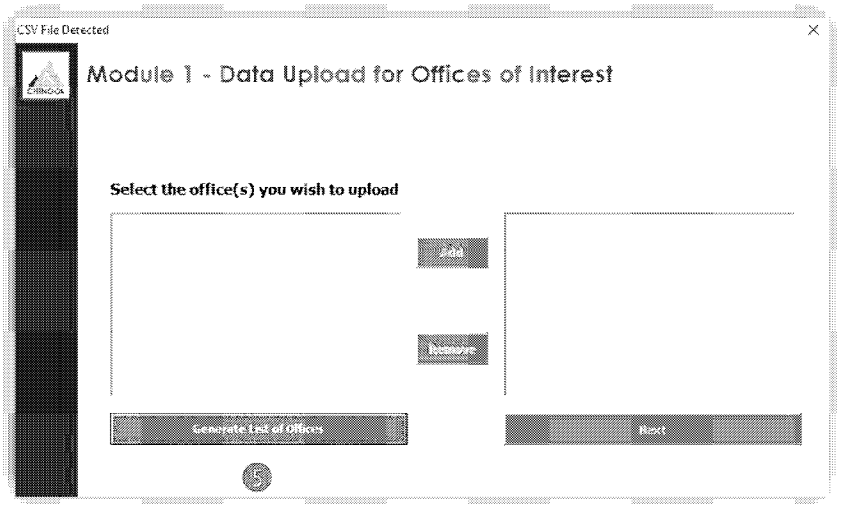


4 **Upload** Data and 5 **Generate** the list of offices.





6 The **process** takes a moment before the office lists are 7 **populated**.

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s.16(2)(c)
s.20(1)(b)

Transitioning to Module 1

Module 1 is an inventory management tool for file triage and activity assignment. It replaces the need for various office-specific tools and GCMS queries. Module 1 automatically triages open applications according to the activity that needs to be completed next, and allows users to work on applications generated from a list of activity lines.

Module 1 streamlines the TR process regardless of processing office and allows for standardized work sharing procedures across the network. For Module 1 to correctly triage files into the required activity lines, officers must follow the standard operating procedures.

Transitioning to Module 1 and adjusting office file management procedures may take up-front resources but will deliver on efficiencies and time savings. Offices are encouraged to go through the standard operating procedures laid out in the activity dictionary to understand how each Module 1 activity should be handled in GCMS.

Helpful points to remember:

- Each activity line in Module 1 corresponds to a specific file state and action required in GCMS. Files move from one activity line to another after the required action is completed in GCMS and the file is ready for the subsequent action.
- Module 1 does not use paper file locations, organizations, temporary processing groups or GCMS user IDs for file management. Users should refrain from using these other methods to track files in GCMS, and GCMS assigned to fields must be cleared before setting up Module 1.
- Key file stages and their corresponding eligibility statuses are below. If your office does not follow these statuses, it is recommended that you choose a day to switch over your entire TR inventory accordingly.
- Key activities and their corresponding actions in GCMS for handling correspondence
- , such as by creating or grouping pre-assessment or officer review lines by purpose of visit. However, offices should not deviate from the standard operating procedures and corresponding file states.

Stage	Eligibility Status	Activity
Initial Stage	Null	File preparation activities are underway (e.g., fees, biometrics)
Pre-Assessment	Review Required/Recommend Passed	A program assistant has pre-assessed the file and it is now ready for officer review
Officer Review	Passed/Failed/Recommend Interview	An officer has reviewed the file and made a decision or requested additional items (e.g, documents, verifications)
Post-Decision	Passed/Failed	An officer made a decision on the file and it is now ready for finalization (e.g., passport request, visa printing).

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Appendix 1: Module 1 Correspondence Handling

What's missing	Item	Conditions	Eligibility status when Outgoing Correspondence sent:	Eligibility status when Item Requested provided:	Incoming Correspondence Requested Item status when provided:
Pre-eligibility					
Fees	Outgoing Correspondence Request Letter, Requested Item Payment Receipt	Fees are Outstanding	Null	Null or Review Required if file check done	Change to Received
Screening documents	Outgoing Correspondence Request Letter, Requested Item varies		Null	Null or Review Required if file check done	Change to Received
Any other documents except CAQ or Parental Consent	Outgoing Correspondence Request Letter, Requested Item varies	none	Recommend Interview	Null or Review Required if file check done	Change to Received
CAQ or Parental Consent	Outgoing Correspondence Request Letter, Requested Item is any of 'CAQ', 'Parent Consent Letter', 'Custodianship Decl. IMM5646', 'Parent Authorization to Travel'	none	Review Required	Do not change, and do not assign	Change to Received
Eligibility					
Any documents except CAQ or Parental Consent	Outgoing Correspondence Request Letter, Requested Item varies	none	Recommend Interview	Recommend Interview and assign to requester	Keep at Provided
Post-Eligibility					
CAQ or Parental Consent	Outgoing Correspondence Request Letter, Requested Item is any of 'CAQ', 'Parent Consent	none	Passed	Passed	Change to Received

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	Letter', 'Custodianship Decl. IMM5646', 'Parent Authorization to Travel'				
Medical					
Procedural Fairness Response	Outgoing Correspondence Item Procedural Fairness Letter, Requested Item varies	Medical is Failed	Any	Any and assign to requester	Keep at Provided

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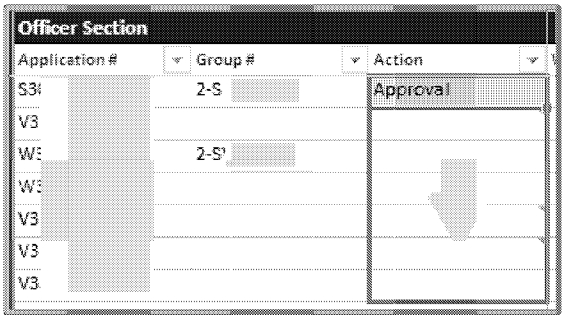
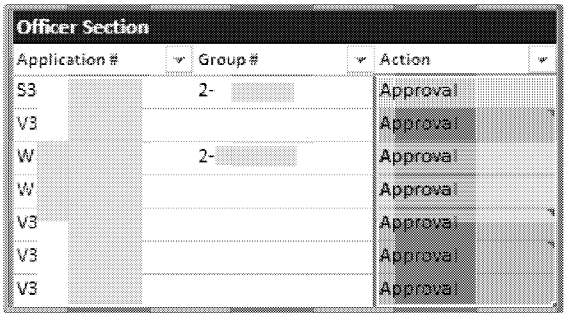
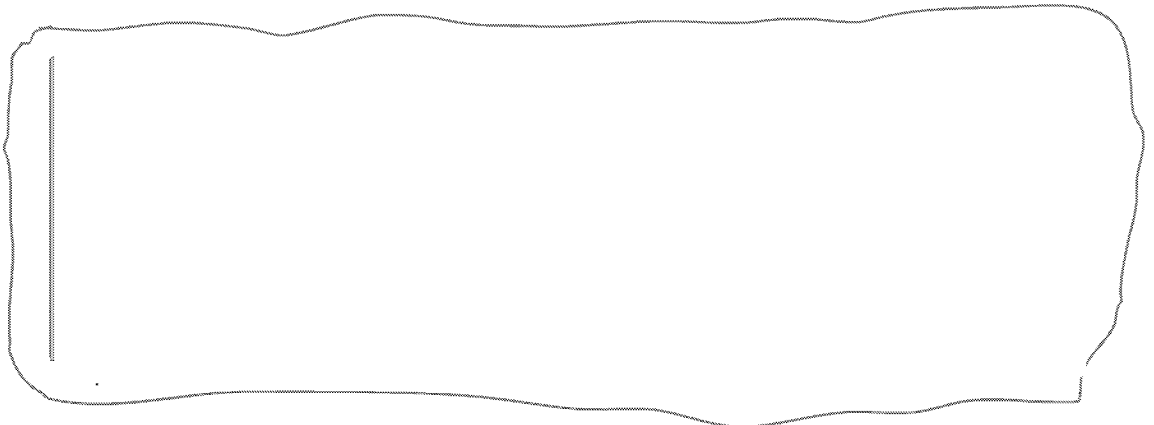
Using the Action Column (continued)

Alternatively, enter the action on a single application, then click hold down the Action cell and drag across all the application for which you want the action to apply.





6. **Approvals**: You will be presented with the following Action Window.
   - Click the *Approval* checkbox.
   - Ensure the correct line of business is selected from the drop-down menu.
   - Once your desired actions have been entered *click Save Action & Notes*



7. **Refusals:** You will be presented with the following Action Window.
   - Click the *Refusal* checkbox.
   - Ensure the correct line of business is selected from the drop-down menu.
   - *Edit Deactivated*: This button will activate the edit function for each refusal ground. Select it before you enter your refusal grounds, and it will allow you to edit each ground separately.
   - *Refusal Reasons*: Check the boxes that correspond to your refusal grounds.
   - *Refusal Note Generator*: For each refusal ground selected, a corresponding line will be added to the refusal note. For certain refusal grounds, multiple options will be available, and you will be prompted to amend the text to reflect your application.
   - Once your desired actions have been entered *click Save Action & Notes*

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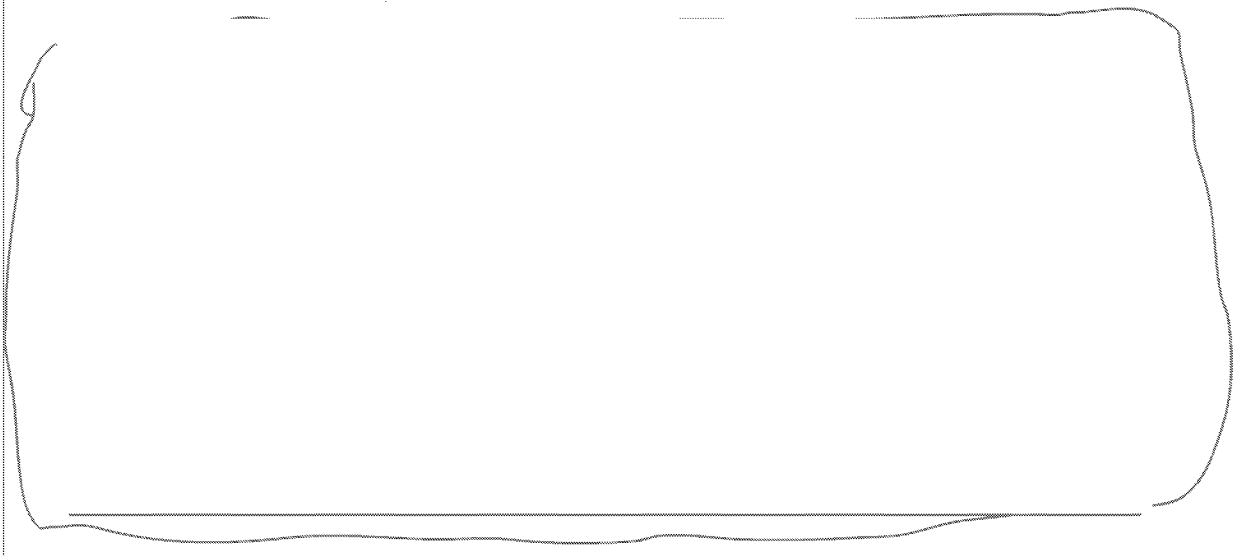
s.16(2)(c)
s.19(1)

Using Action Lists with GCMS

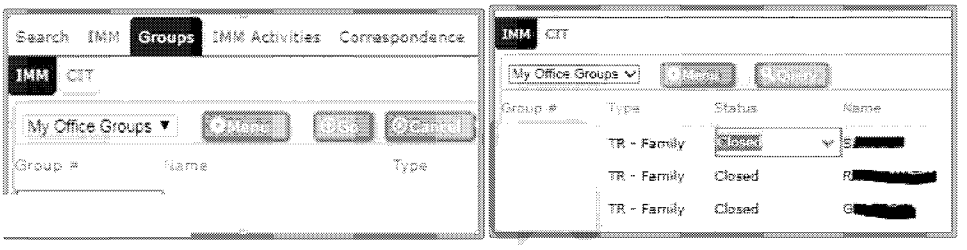
Action List Overview

1.



Approval or Withdrawal Action Lists

2.



3.

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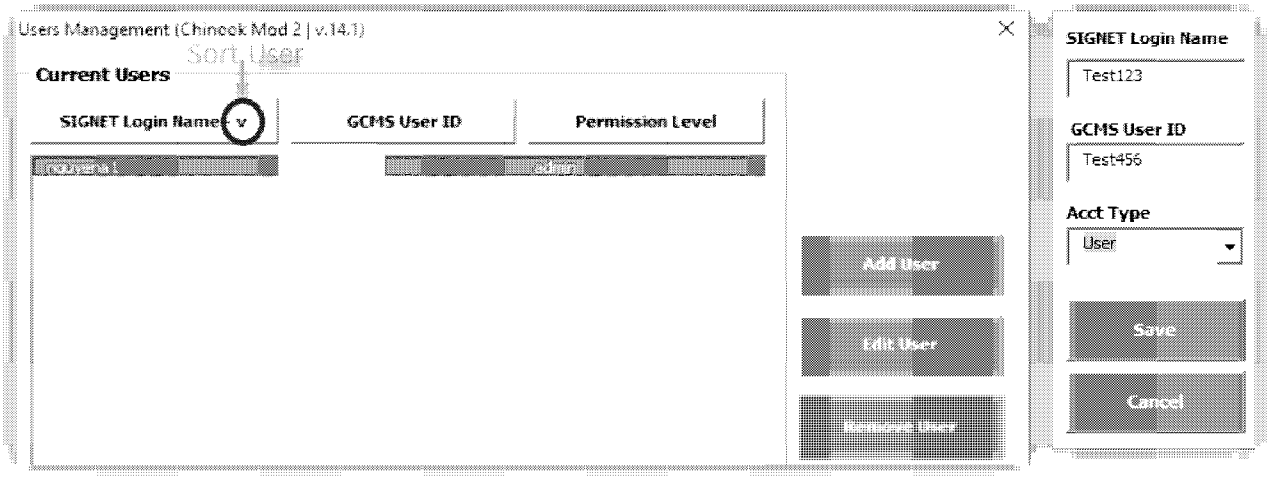
3. CUSTOMIZATION

3.1 Customization: User privileges

The **first** user to open and save a new release becomes an **administrator** by default

When you click ⑤ **Manage Permissions** (see Picture 02), all current users with their GCMS ID and permission levels will be displayed. Only when you have Admin privileges, you can add, modify, or remove users.

To add users, click "**Add User**". You will need to enter "**SIGNET Login Name**", "**GCMS User ID**" and "**Account Type**" (meaning level of privilege, either User or Admin). Click "**Save**" after filling all information. You can modify user's information by selecting an entry -> click "**Edit User**"/ "**Remove User**". To sort users, click on the down arrow next to the criteria you want to sort by. Finally, save the Excel document.

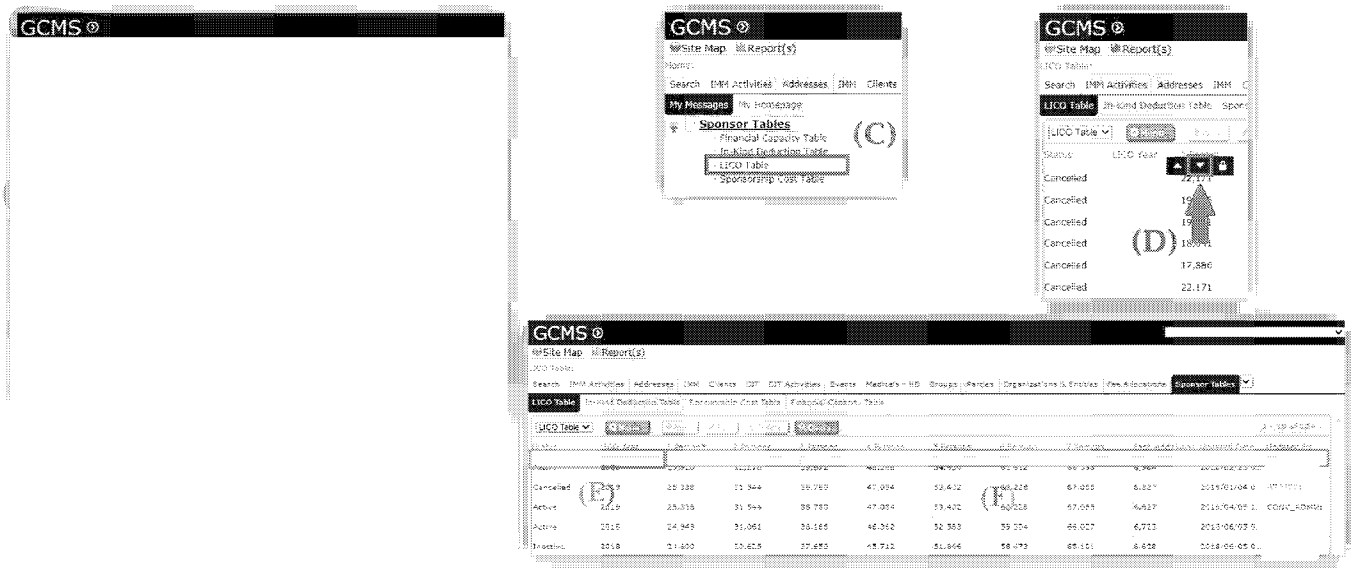


3.2 Customization: LICO (updating LICO table yearly)

Click ③ **LICO table** (see Picture 02) **(to be updated yearly)** and follow following steps in GCMS:

(A) **Site Map ››› (B) Sponsor Tables ››› (C) LICO Table ››› (D) Sort by LICO year** (recent to old)

››› (E) **Active** Status & **Current** year **›››** (F) **Copy-Paste** values in the **LICO table.**



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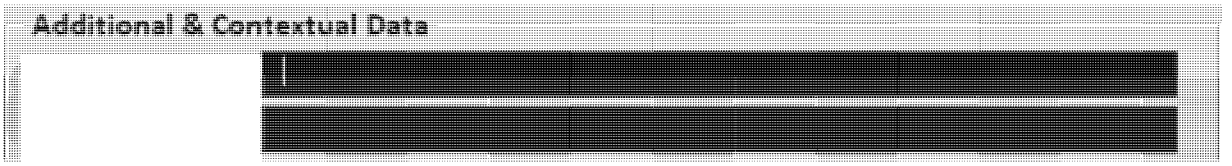
5.1.9 Additional & Contextual Data

Purpose: to provide extra contextual info to the . No input required by the user as it only displays information when there is a data for the applicant. This block should be listed first to be presented right below the general contextual info.

LoB Defaults: Applicable to all LoBs.

Customization(s): No customization options are available for this block.



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MODULE 1 FILE MANAGEMENT

The MOD1 is based on 4 files and allows users to perform:

- File triage management
- File assignment

	The tool itself	Chinook - FMS.**xlsm**	AppWorkloadDB Chinook - FMS Chinook - Mod 1 Schema
Database	**The database**	AppWorkloadDB.**mdb**	
	Data Warehouse	Chinook - Mod 1.**csv** Schema.**ini**	

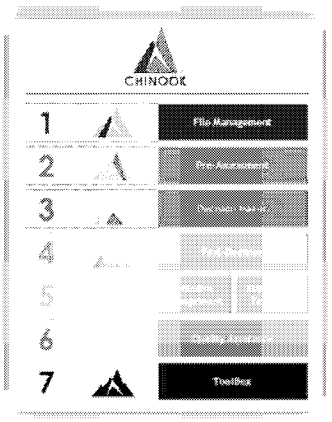
With Chinook, the Task Manager automatically loads all of the required information into a single Task Manager window. Where applications are ordered by the next task or activity required in the processing continuum for the officer review. Task manager benefits:

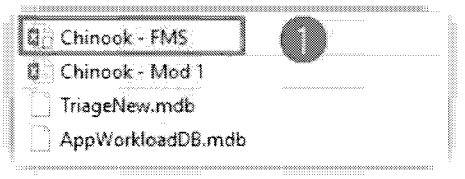
- Avoids manual queries in GCMS
- Provides an instant snapshot of office TR Caseload

Initial Setup

A pristine version of Module 1 that has not yet been configured will automatically make its first user into an Administrator. It is recommended that any new setup of the system is performed by one of the users who will have administrator privileges. Setup is performed by officers with administrator permissions.

Click on the **MOD1 File Management**, from Chinook main interface . A macro-enabled Excel file opens: 1 **Chinook – FMS.xlsm**. You are invited to click on the 2 **Launch button,** then on 3 **OK button**.





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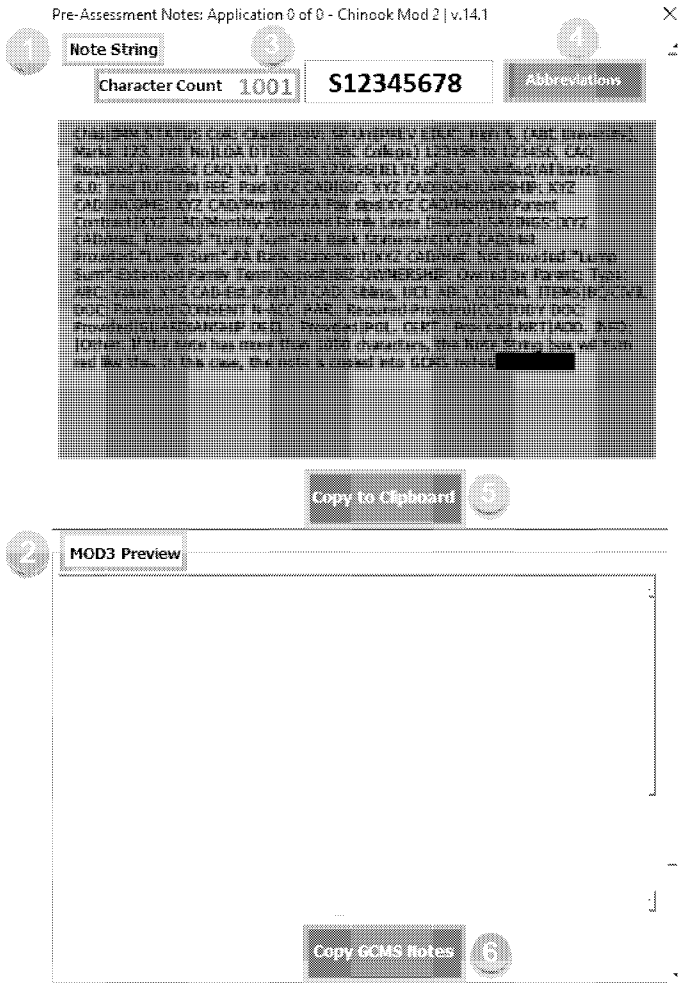

4.8 Character count

If 3 **Character Count** is greater than 1000, the window will turn red (Picture 04) to signal that the notes are not compatible with the field in GCMS. If the generated notes are still copied, any characters beyond the 1000 threshold will be cut.

Anytime, you can view abbreviations by clicking 4 **Abbreviations** or copy notes by using 5 **Copy to Clipboard** or 6 **Copy GCMS Notes** button.

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5.1 GENERAL INFORMATION BLOCKS

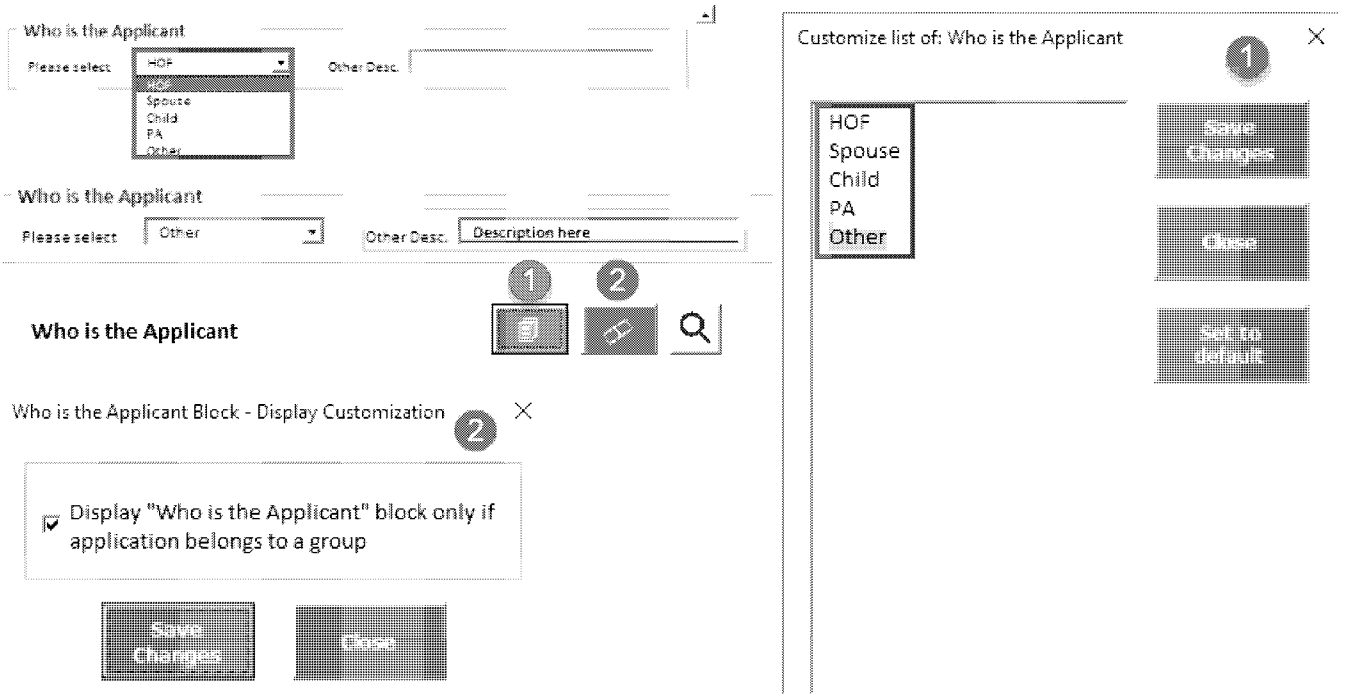
5.1.1 Who is the Applicant?

Purpose: to identify what an applicant's relationship with other members of a group application is. The "**Other Desc.**" field turns from grey to white if "**Other**" is selected to prompt user to provide further information.

LoB Default: This block is set as default for all 11 LoBs.

Customization(s):

1. By default, this block is only displayed to users if an application is part of a group. Admin users can change the setting by unchecking (2) **Display Customization** box.
2. (1) **Customize list** can contain up to 25 choices. The "**Other**" option is mandatory as it is linked to the "**Other Desc.**" field.



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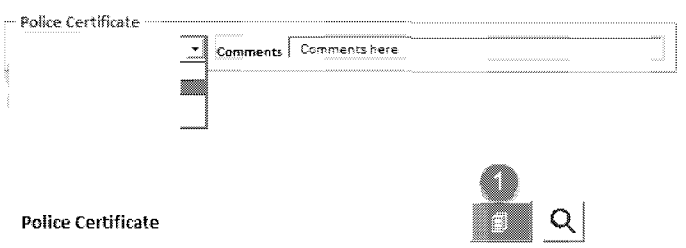
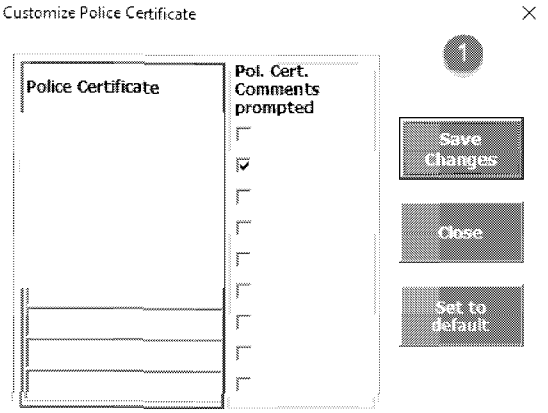
5.1.7 Police Certificate

Purpose: to provide information on the Police certificate requirement.

LoB Defaults: Applicable to some LoBs.

Customization(s): The dropdown is customizable and can contain up to 25 choices. For each choice, you can customize to make "**Comments**" text box available or not. If the "**Comments**" box is left blank, it will not be mentioned as "*Not pre-assessed*" in the notes.





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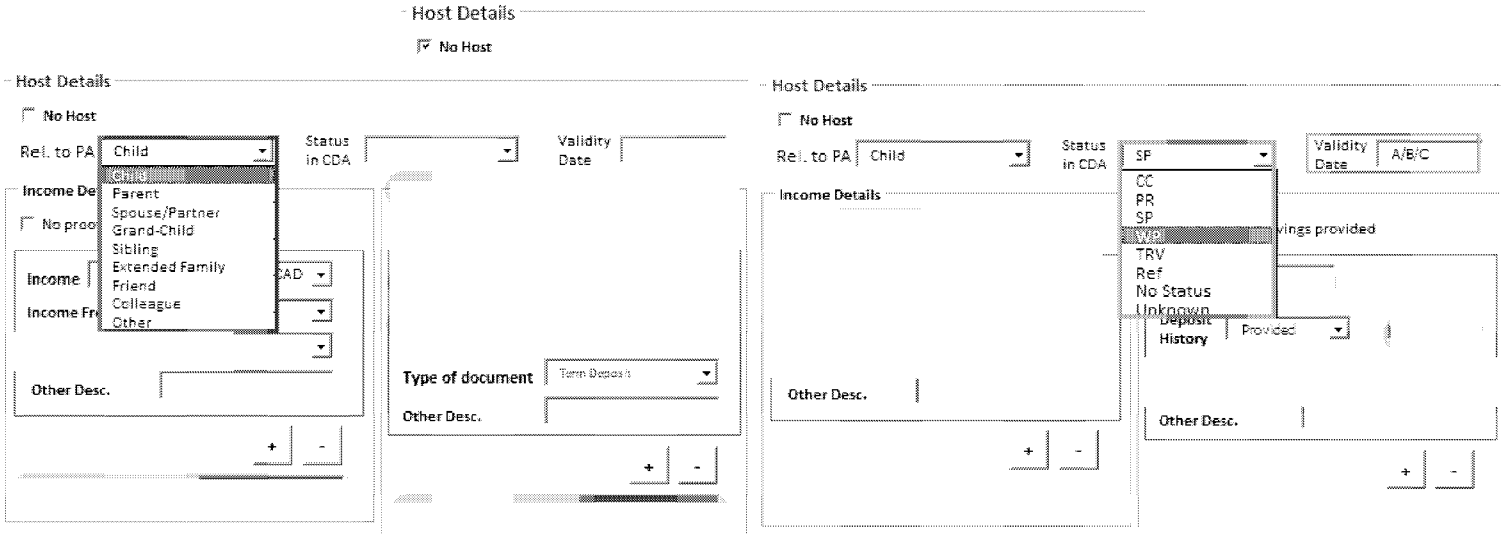
5.2.3 Host Details

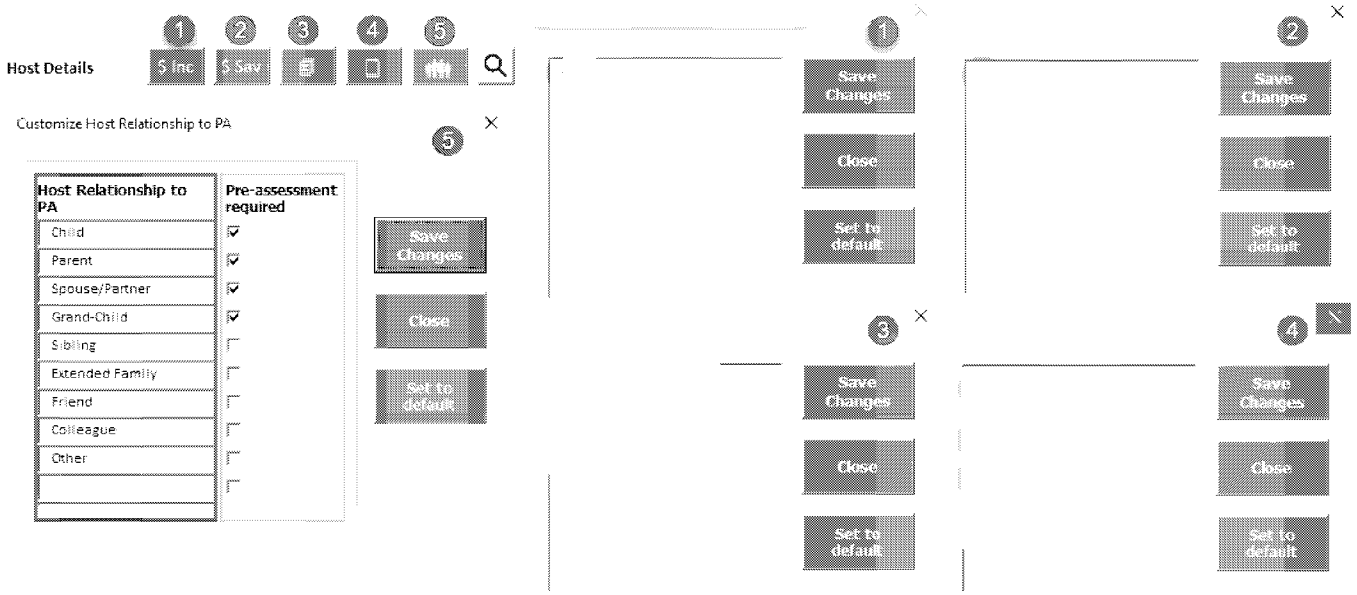
Purpose:

When there is no information about hosts on file, "**No Host**" checkbox needs to be checked, and the whole block will then collapse. In additional to "**Rel. to PA**" field, pre-assessors must indicate "**Status in Canada**" of the Host. If Host's status is either SP, WP or TRV, "**Validity Date**" field will be triggered to be filled in.

Customization(s):

- In 5, customization with "**Host Relationship to PA**" and "**Pre-assessment required**" checkbox works as same as the "**3rd Party Relationship to PA**" and "**Pre-assessment required**"
-
- The "**Status in Canada**" field is non-customizable.





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CHINOOK

IRCC Chinook Module 5 – Indicator Submission Template

Submission Date: 2021-06-23

IRCC Office Name: Choose an item.

Summary of Submission:

s.15(1)(i)i)

Source: Choose an item.

Rule Origin: Choose an item.

Rule Type: Choose an item.

Criteria:

*A list of all possible filters that can be selected from is attached as Annex A.

Validity Period: Choose an item.

Justification:

Rule Logic:

Rule Instructions:

Sample Application Numbers:

Other:

Save as: Mod5 Submission - - 23.06.2021 - #

s.16(2)(c)
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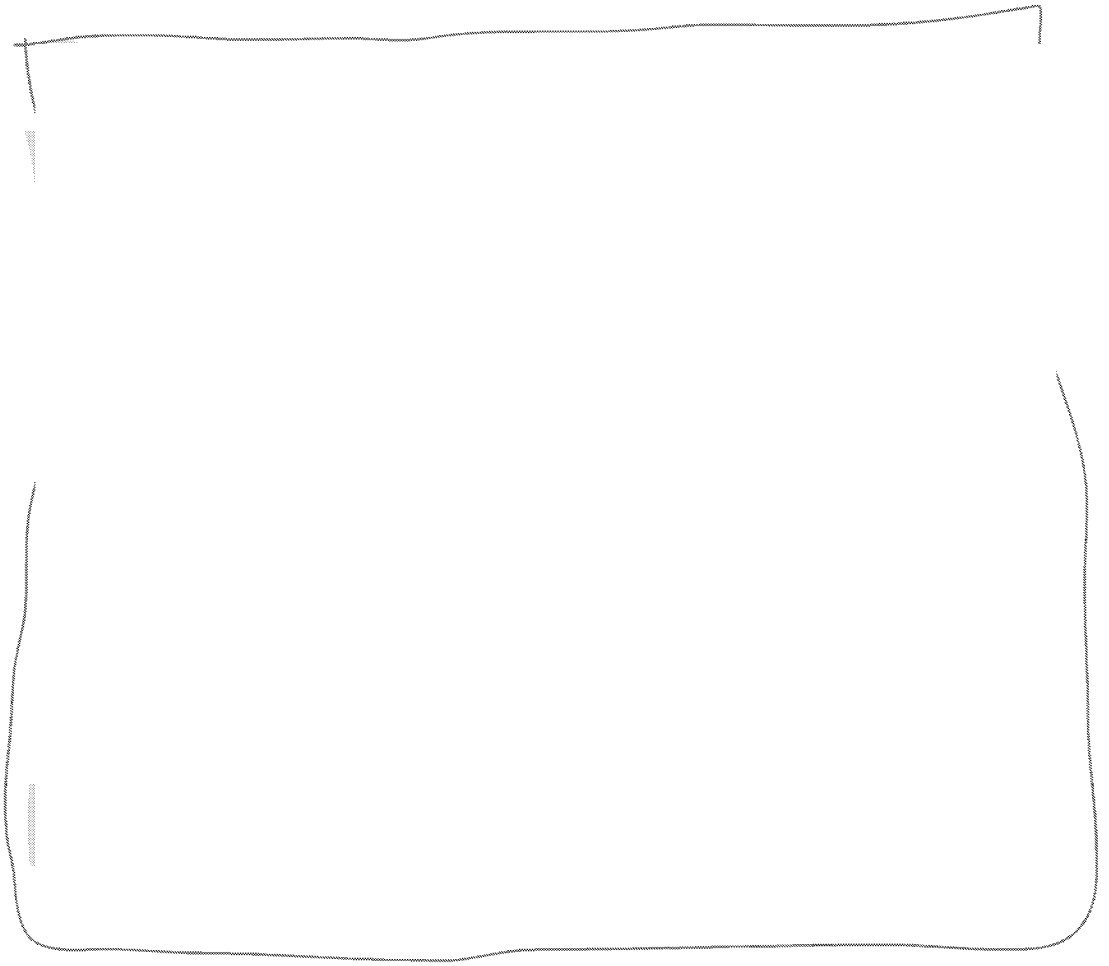
Using the new Biometrics Action column (continued)



5. For applications where the *Biometric – FCC Detail* Activity for US, NZ or AUS is at status *Ready to be Assessed*, the appropriate check boxes will be activated.

6. **Reviewed:** Click on the appropriate checkbox to set the biometrics activity status to *Complete – Assessed.* Once you have checked any of the boxes in the Biometrics Window, the Biometrics Action column will subsequently display *Reviewed* for that application.

7. **Review Required:** If further review of the biometrics is required outside of Chinook, click the *Review Required* checkbox. The Biometrics Action column will subsequently display *Review Required* for that application.

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ANNEX A

Biometric Action Column

Biometric Action Column Display	Biometrics Details Column: Lead Tag Line	Logic
POT ERROR – SEE GCMS	Potential Info Sharing Error – see GCMS	
ERROR Q1 – SEE GCMS	Info Sharing Q1 Failure – see GCMS	
ERROR Q2 – SEE GCMS	Info Sharing Q2 Failure – see GCMS	
NOT ASSOCIATED *OR* **ALL NOT ASSOCIATED**	Biometrics Not Associated - see GCMS	
POT ADV - SEE GCMS	Potentially Adverse Info – see GCMS	

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s.16(2)(c)

Final Decision Logic - WP

	Activity/Field in GCMS	What happens in GCMS	Final Decision: Approval	Final Decision: Refusal	Final Decision: Withdrawal
Eligibility & Findec	Eligibility Assessment		Eligibility: Passed	Eligibility: Failed	Eligibility: (blank – unless already Passed or Failed)
	Final Assessment		Final Decision : Approved	Final Decision : Refused	Final Decision : Withdrawn
Notes	Notes tab		Yes	Yes	Yes
Refusal Grounds:	Finalize Application>Refusal Grounds Refusal Letter Details>Paragraph Type		N/A	Yes Refusal Letters Details> Paragraph Type based on Chinook entry	N/A
Correspondence:	Correspondence>Outgoing		POE Introduction Ltr = Generate Work Permit = Authorized	Refusal Letter = Generate	
			POE Introduction Ltr = Generate Work Permit = Authorized Original Passport Request = Sent	Refusal Letter = Sent	No letter generated – cannot automate letters that have to be picked from the T:Drive
			POE Introduction Ltr = Generate Work Permit = Authorized Original Passport Request = Generate	Refusal Letter = Generate	
Counterfoil	Finalize Application> Document Issuance		Generate and set Print Queue Set Validity Date Counterfoil = Generate eTA = Authorized	N/A	N/A
Permit	Finalize Application >Document Issuance>Type = Permit – WP		Set Validity Date User Remarks based on Chinook entry Conditions based on Chinook entry	N/A	N/A

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