





**Get to know  
Primero v2**

# Dashboard

A user-friendly dashboard gives protection workers an easy way to monitor their daily work, scheduled activities, and flagged cases.

The dashboard features a sidebar with navigation options: Home, Tasks, Cases (with a notification badge), Tracing Requests, Incidents, Matches, Exports, Support, Case Worker, Settings, and Log out. The main content area includes:

- OVERVIEW**: Cases by assessment level (3 High, 6 Medium, 2 Low) and My Cases (3 New This Week, 0 Updated, 8 Open, 0 Closed, 11 Total).
- ACTION NEEDED**: Summary of 3 Cases New This Week, 1 Referral New, and 1 Transfer Awaiting Acceptance.
- WORKFLOW**: A 5-step process flow: 1. NEW (3 Cases), 2. CASE PLAN (8 Cases), 3. RESPONSE TYPE 1 (0 Cases), 4. RESPONSE TYPE 2 (0 Cases), 5. SERVICE IMPLEMENTED (0 Cases).
- FLAGGED**: List of cases with IDs, names, dates, and status (e.g., #1F-2342A2, Pan He, 2019.07.11, Please check approvals).
- APPROVALS**: Summary of 3 Pending, 0 Rejected, and 10 Approved cases across Assessment, Case Plan, and Closure stages.
- REFERRALS**: 1 New and 3 In Progress.
- TRANSFERS**: 1 New and 3 Inactive.


# Self-service configuration

The image displays the Primero self-service configuration interface. On the left is a navigation sidebar with options: Home, Cases (4), Incidents, Tracing Request, Reports, Exports, Support, primero, Settings, and Log out. The main area is divided into 'SETTINGS' and 'FORMS'. Under 'FORMS', there is a 'REORDER' section with a list of form templates: Record Information, Notes, Identification / Registration, Data Confidentiality, assessment, and Family / Partner Details. To the right, there are configuration options for 'Record Type' (CASE, TRACING REQUEST, INCIDENT) and 'Module' (CP, GBV). An 'EDIT FIELD' dialog box is overlaid, showing options for field lookups, visibility (Web app, Mobile app, Show page, Short form), and field types (Select Drop Down, Text Area). The interface also shows logos for GBVIMS+ and SWIMS.

- Select the form templates you want to use as a baseline
- Contextualize the forms, lookups and permissions yourself
- Manage languages / translations
- Import the locations
- Review with the stakeholders
- You're ready for production!

# Task Scheduler

View all pending and incomplete tasks including assessments, case plans, follow ups, and services.



Home

Tasks

Cases 2

Incidents



Tracing Request

Exports

Support

primero\_cp

Log out



English

## TASKS

ID#	NAME	PRIORITY LEVEL	TYPE OF ACTION	DUE DATE	STATUS
a2dc16b	Elijah Sadek	HIGH	Assessment	08-Jun-2020	!
ff331c5	Milton Bob Bradley	MEDIUM	Case Plan	15-Jun-2020	!
a2dc16b	Elijah Sadek	HIGH	Service - Health/Medical Service	15-Jun-2020	!
7185931	*****	HIGH	Case Plan	20-Jun-2020	!
269bf74	ABC DEFG	MEDIUM	Assessment	22-Jun-2020	!
f6248e1	Test-Firstname Test-Surname	NO ACTION	Service - Psychosocial Service	26-Jun-2020	!
269bf74	ABC DEFG	MEDIUM	Service - Registration Service	07-Jul-2020	!

Rows per page: 20 1-7 of 7 < >

# Case List View

Smart searches, sortable columns, easy-to-use filters. All records have a unique identifier. Users with permissions may view, edit or export data.

The screenshot displays the 'Cases' list view in the Primero application. The interface includes a left-hand navigation menu with options like Home, Tasks, Cases (with a notification badge), Incidents, Tracing Request, Exports, Support, and user profile information. The main content area shows a table of cases with columns for ID#, Name, Age, Sex, Registration Date, and Photo. A search bar and filter controls are located at the top right. The table lists six cases, each with a unique ID and associated details. The bottom of the page features logos for UNICEF and RESCUE, along with a language selector set to English.

**Primeró**

Home  
Tasks  
Cases 2  
Incidents  
Tracing Request  
Exports  
Support  
primero\_cp  
Log out

**CASES** + NEW ⋮

Search

FILTERS SAVED SEARCHES

APPLY SAVE CLEAR

Age Range ↕ ▼  
Sex ↕ ▼  
Case Plan ↕ ▼  
Risk Level ↕ ▼  
No Activity ↕ ▼

Status ↕ ▲  
 Open  
 Closed

Enabled / Disabled ↕ ▲

Rows per page: 20 1-6 of 6

ID#	NAME	AGE	SEX	REGISTRATION DATE	PHOTO
<input type="checkbox"/>	f6248e1 Test-Firstname Test-Surname	10	Male	25-Jun-2020	<span>●</span>
<input type="checkbox"/>	269bf74 ABC DEFG	11	Male	18-Jun-2020	<span>●</span> <span>1</span>
<input type="checkbox"/>	a2dc16b Eliah Sadek	18	Male	06-Jun-2020	
<input type="checkbox"/>	880b9b9 Samantha Jones	15	Female	08-Jun-2020	<span>1</span>
<input type="checkbox"/>	7185931 *****	12	Female	05-May-2020	<span>2</span>
<input type="checkbox"/>	ff331c5 Milton Bob Bradley	13	Male	01-Jun-2020	

Rows per page: 20 1-6 of 6

English ⌵

# Customizable Forms (1)

The screenshot displays the GBVIMS+ interface. At the top, the case ID is AMA2/07/20/54A6380. A progress bar shows steps: 1. NEW (checked), 2. ASSESSMENT, 3. CASE PLAN, 4. RESPONSE TYPE 1, 5. RESPONSE TYPE 2, 6. SERVICE IMPLEMENTED, 7. CLOSED. The main content area is titled 'INDIVIDUAL'S DETAILS' and includes fields for 'Other Name / Nickname' (Kojo Black), 'Date of Registration or Interview' (24-Jul-2020), 'Date case identified / reported' (24-Jul-2020), 'Sex' (Male), 'Age\*' (12), and 'Date of Birth' (05-May-2008). A 'Settings' dialog box is overlaid on the right, showing a 'BASIC IDENTITY' section with a 'Fields' list. The 'CREATE FIELD' dialog is open, allowing the user to select a field type from a list: Text Field, Text Area, Tick Box (checked), Select Drop Down, Radio Button, Multi-select, Numeric Field, Date Field, Date-Time, Separator, and Subform. The 'SELECT' button is highlighted in blue.

- Forms are fully customizable
- Add new forms, fields and workflows as your programme evolves
- Form groups and skip logic is also configurable
- Primero maps to the existing programme to facilitate improved information management

# Customizable Forms (2)

- Nested forms allow for the simple tracking of services over time
- Configurable lookups combined with standardized taxonomies provide for better evidence generation and analysis
- Upload your organization's logo
- Switch between any languages

The screenshot displays the Primero case management system interface. At the top, the case ID is F6248E1. A progress bar shows the current step is 'CASE PLAN' (step 3), with previous steps 'NEW' and 'ASSESSMENT' completed, and subsequent steps 'SERVICE PROVISION' and 'CLOSED' pending. The main content area is titled 'PROTECTION CONCERNS' and includes a 'Yes/No' selection, 'Risk Level' dropdown, and 'Displacement Status' dropdown. A blue-bordered box highlights a 'Protection Concerns' section with a 'Select all that apply' header and a list of concerns: Sexually Exploited, GBV survivor, Trafficked/smuggled, Stateless, Arrested/Detained, Migrant, Disabled, and Serious health issue. The left sidebar contains navigation options: Home, Tasks, Cases (with a '2' notification), Incidents, Tracing Request, Exports, Support, primero\_cp, and Log out. At the bottom of the sidebar, the UNICEF logo is displayed, with a blue arrow pointing to it. The language is set to English.

# Photo, audio and document uploads

One click access via the case list view gives a case worker a quick view of the client. Save birth certificates, school reports, assessments and other key documents to the case record.

**Primero**

Home  
Tasks  
Cases 2  
Incidents  
Tracing Request  
Exports  
Support  
primero\_cp  
Log out

**RESCUE**  
unicef

English


**CASE ID F6248E1**

NEW — ASSESSMENT — **3 CASE PLAN** — 4 SERVICE PROVISION — 5 CLOSED

Record Information ^  
Case Conference Details  
Identification / Registration ^  
Data Confidentiality  
Assessment ^  
Family / Partner Details ^  
Case Plan  
Services / Follow Up ● ^  
Closure  
Tracing ^  
BIA Form  
**Photos and Audio**  
Other Documents

**PHOTOS AND AUDIO**

Current Photo Key



Recorded Audio

# Privacy by design & Confidentiality

- Case data is only shared for transfers, referrals, service provision, family tracing and/or statistical analysis if the adequate level of consent has been provided
- Specific team members have a user-friendly Audit Log which contains a list of all users and the actions they have taken in the system

The screenshot displays the Primero case management interface for case ID F6248E1. The left sidebar contains navigation options: Home, Tasks, Cases (with a notification badge), Incidents, Tracing Request, Exports, Support, and a user profile for 'primero\_cp' with a 'Log out' option. The main content area shows a list of case stages: Record Information, Case Conference Details, Identification / Registration, Data Confidentiality (highlighted), Assessment, Family / Partner Details, Case Plan, Services / Follow Up, Closure, Tracing, BIA Form, Photos and Audio, and Other Documents. A modal window titled 'DATA CONFIDENTIALITY' is open, featuring a 'CANCEL' button and a 'SAVE' button. The form includes the following fields and options:

- Consent Obtained From:** (Select...)
- If Other, please specify:** (Text input field)
- Consent has been obtained for the child to receive case management services
- Consent is given share non-identifiable information for reporting:**  Yes  No
- Consent has been obtained to disclose information for tracing purposes:**  Yes  No
- If this field is 'No', the child's case record will not show up in Matches with Inquirer Tracing Requests.
- The individual providing consent agrees to share collected information with other organizations for service provision?

# Flagging and notifications

Flag records for follow up, or for action by another Primero user. Flag alerts appear on the dashboard.

Primero also sends email notifications and push notifications for certain critical processes.

The screenshot displays the Primero case management interface. At the top, the case ID is F6248E1, and the progress bar shows steps: NEW, ASSESSMENT, CASE PLAN (active), SERVICE PROVISION, and CLOSED. The main section is titled 'PHOTOS AND AUDIO' and contains a 'Record Information' dropdown menu.

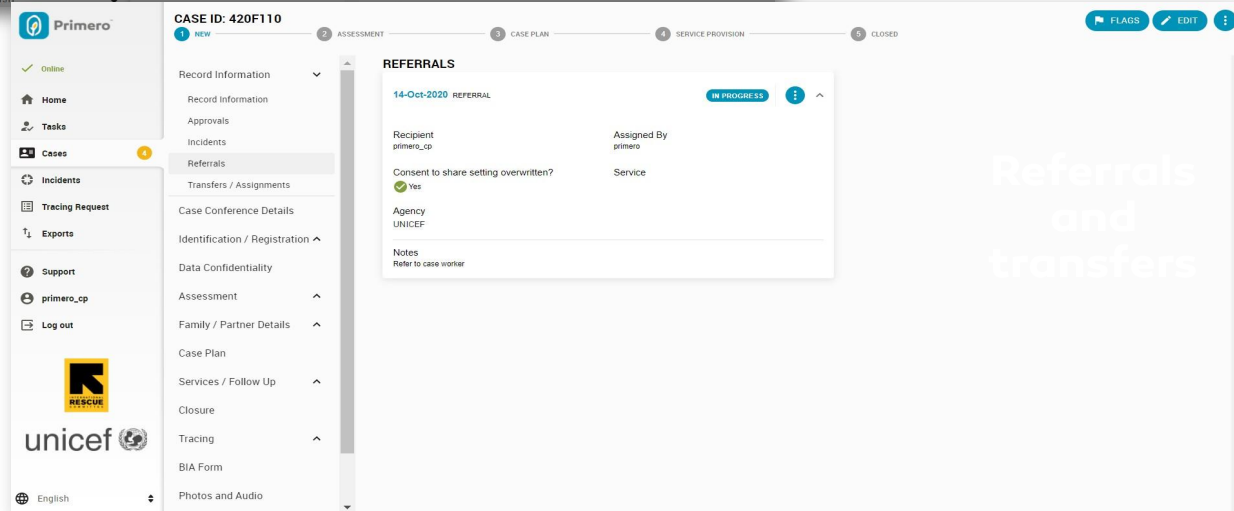
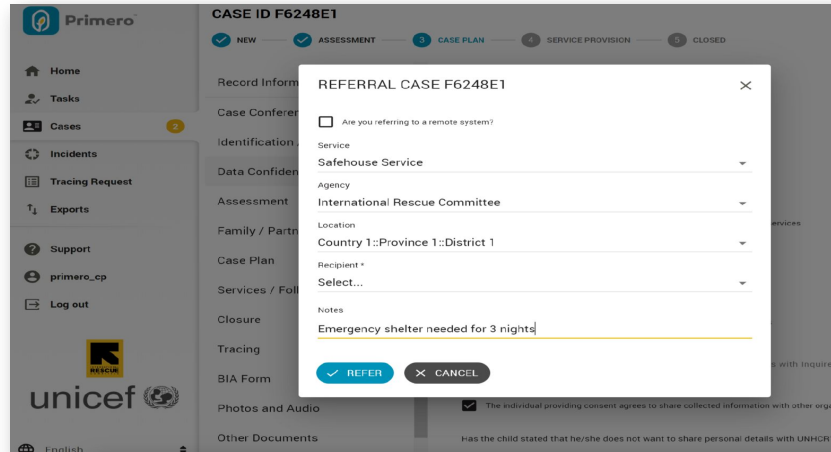
A 'FLAGS' modal is open, showing a form to add a new flag. The flag reason is 'Case Plan needs review' and the flag date is '06-Aug-2020'. There are 'SAVE' and 'CANCEL' buttons at the bottom.

A search results table is also visible, showing a list of records with columns for 'SOCIAL WORKER' and 'PHOTO'. The table has 9 rows, all with 'primero\_gbv' in the 'SOCIAL WORKER' column. The 'PHOTO' column contains icons representing different photo types. The table includes pagination controls for 'Rows per page' (20) and '1-9 of 9'.

On the right side, there is a search bar and a 'FILTERS' section with various filters like 'Age Range', 'Sex', 'Case Plan', 'Risk Level', 'No Activity', 'Status', 'Enabled / Disabled', and 'Flagged'. The 'Flagged' filter is checked.

# Referrals and transfers

Map your referral pathways into the system.  
Easy, secure and confidential referrals and transfers supported by notifications.



Referrals and transfers

# Approvals

Send case plans, assessments and case closures to members of the care team safely and securely.

## Approvals

PENDING APPROVALS

- 5 Assessment
- 3 Closure
- 8 Case Plan

- Record Information ● ^
- Identification / Registration ^
- Consent and Assent
- Assessment ● v
  - Assessment Status ●
  - Protection Concerns
  - Assessment
  - Summary and Conclusions
  - BID Status
  - BID Report
- Case Plan ●

### Assessment Status

● Approval is pending for Assessment Status

Approved by Manager

Yes

Date

--

dd-mmm-yyyy

Manager Comments

--

Approval Status

Pending

# Family tracing and reunification

Family tracing capabilities are built into the platform, and linked to the case management module.

The screenshot displays the Primero web application interface. On the left is a navigation sidebar with the following items: Home, Tasks, Cases (with a '2' notification badge), Incidents, Tracing Request, Exports, Support, primo\_cp, and Log out. The main content area is titled 'TRACING REQUEST ID A8C6DB7'. It features a 'Record Information' dropdown menu with options for 'Inquirer', 'Tracing Request', and 'Photos and Audio'. The 'Inquirer' option is selected, showing details for an 'INQUIRER' with a Long ID of 31c9a3da-f3f6-45bc-965c-be2e3a8c6db7, an Inquirer ID of a8c6db7, a Date of Inquiry of 25-Jun-2020 (format dd-mmm-yyyy), and an Inquiry Status of Open. At the bottom of the sidebar, there is a 'RESCUE' logo, the UNICEF logo, and a language selector set to 'English'.

This screenshot shows a modal window titled 'TRACING REQUEST' for ID 29F827F. The modal contains a 'Record Information' dropdown menu with 'Tracing Request' selected, which has a 'test' button next to it. Below this, there is an 'Individual Details' section with the following fields: Name (test), How is the inquirer related to the child? (Father), Did the child live with the inquirer before separation? (radio buttons for Yes and No, with Yes selected), and Nickname.

# Link Family Members

The screenshot displays the CPIMS+ interface. On the left is a navigation sidebar with options like Home, Tasks, Cases, Incidents, Tracing Request, Families, Exports, Support, and a user profile. The main content area shows a case record for Case ID: 94517f7, with a progress bar indicating steps: 1 New, 2 Assessment, 3 Case Plan, and 4 Services. A 'Family Details' panel is open, showing a list of family members: Priya Bagwan, Puja Bagwan, and Vikram Bagwan. The 'Family Details - 118c2e9' form is displayed, containing the following fields:

- Name:** Vikram Bagawan
- Relationship to child:** Brother
- Is this person the caregiver?:**  Yes
- If the family member is not the primary caregiver, select responsibility:** Not applicable
- Does this person live with the child?:**  Yes

Buttons for 'Back to Family Details' and '+ Create Case' are also visible.

- The families feature is a way to link family members within the system and update their information across case records in a centralized way

# Reporting and Analysis

- Build and edit custom reports and Insights
- Use filters, ranges and aggregate counts to generate tables and graphs
- Built-in KPIs configured by user role
- Export data in multiple formats for analysis



# Managing Users and Roles

- Granular role-based Access
- Intuitive configuration user interface to help programme level admins support their teams
- Tool tips and embedded Help
- Supported by Azure Active Directory and OpenID Connect

The screenshot displays the GBVIMS+ user management interface. On the left is a sidebar with navigation options: Home, Cases (with a notification badge), Incidents, Tracing Request, Reports, Exports, Support, primero, Settings, and Log out. The main content area is split into 'SETTINGS' and 'USERS' sections. The 'USERS' section contains a table of users with the following data:

FULL NAME	USERNAME	POSITION	AGENCY
Agency User Administrator	agency_user_admin		
GBV Agency User Administrator	agency_user_admin_gbv		
CP Worker	cp1		
CP Worker	cp2		
CP Worker	cp3		
System Superuser	primero		
CP Administrator	primero_admin_cp		
GBV System Administrator	primero_admin_gbv		
GBV System Administrator AR	primero_admin_gbv_ar		

Additional interface elements include a '+ NEW' button in the top right, 'APPLY' and 'CLEAR' buttons below the table, and a dropdown menu for 'Agency' with a refresh icon.

# Audit log

Accountability by design, with advanced audit capabilities and remediation features.

**GBVIMS+**

**SETTINGS**

- Users
- Agencies
- Roles
- User Groups
- Contact Information
- Modules
- Form
- Locations
- System Settings
- Audit Logs**
- Matching

**AUDIT LOGS**

TIME	PERFORMED BY	ACTION	DESCRIPTION	RECORD OWNER
05-Aug-2020 14:27	primero	index	Listing Records User " by user 'primero'	primero
05-Aug-2020 14:27	primero	list	translation missing: en.logger.list Agency " by user 'primero'	primero
05-Aug-2020 14:27	primero	index	Listing Records Agency " by user 'primero'	primero
05-Aug-2020 14:27	primero	list	translation missing: en.logger.list Dashboard " by user 'primero'	primero
05-Aug-2020 14:27	primero	bulk_index	translation missing: en.logger.bulk_index Alert " by user 'primero'	primero

**Filter Sidebar:**

- Time: 06-Aug-2020 14:29
- From: 06-Aug-2020 14:29
- To: 06-Aug-2020 14:29
- Performed By: [Dropdown]

**Bottom Bar:** English

# Online and Offline Functionality

The image displays two overlapping screenshots of the CPIMS+ dashboard. The top screenshot shows the 'Offline' state, with a notification banner at the top stating 'You're offline. The dashboard will be fully functional when you are back online'. The bottom screenshot shows the 'Online' state, with a 'Connected' status indicator. Both screenshots feature a sidebar with navigation options: Home, Cases (26), Incidents, Tracing Request, Registry, Reports, Exports, Support, Field Mode (toggle), and user profile (primero\_mgr\_cp). The main content area is divided into sections: Overview (Cases by Assessment Level: 4 High, 5 Medium, 1 Low), Cases To Assign, Approvals, and a table for Cases To Assign.

	HIGH	MEDIUM	LOW	NO PRIORITY
Cases To Assign	0	0	0	0
Overdue Cases To Assign	0	0	0	0

**Approvals**

PENDING APPROVALS  
5 Assessment

- Progressive web app working on all browsers, regardless of the operating system and on any device (like a mobile device, tablet or laptop)
- There is no compromise in the user experience, and can be used when you are connected and not connected to the internet

# Change Log

Track all changes made on a case in an easy-to-use interface where you can filter on specific changes made on a form or field.

**CASE ID: 46B0363**

✓ NEW — ✓ CASE PLAN — 3 SERVICE PROVISION — 4 SERVICE IMPLEMENTED — 5 CLOSED

### CHANGE LOG

Record Information	▼
Record Information	
Approvals	
Referrals	
Transfers / Assignments	
Change Log	
Data Confidentiality	
Identification / Registration	^
Assessment	^
Case Plan	
Case Conference Details	
Services / Follow Up	^
Case Review	

- 21-Jan-2021 15:17  
workflow from "new" to "service\_provision"  
primero\_cp
- 21-Jan-2021 15:17  
Updated "Services" subform [See Details.](#)  
primero\_cp
- 24-Nov-2020 07:29  
Full Name from "Robin Tesland" to "Robin G Tesland"  
primero\_cp
- 24-Nov-2020 07:29  
Middle Name from "--" to "G"  
primero\_cp
- 23-Nov-2020 17:16  
Protection Concerns from "--" to " , "  
primero\_cp
- 23-Nov-2020 14:17  
Case Manager's Location from "--" to "Country 1::Province 1::District 1"  
primero\_cp
- 23-Nov-2020 13:05  
Updated "Family Details" subform [See Details.](#)  
primero\_cp



# Primero™



Primero is the product of a broad-based inter-agency initiative focusing on bringing better information management to the protection sector.

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Many thanks to the CPIMS Steering Committee and the GBVIMS Steering Committee.

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Special thanks to the hundreds of testers and contributors from dozens of partner organizations for your support and insights.

For view all features and functionality, visit  
<https://support.primero.org/documentation>

[primero.org](https://primero.org) / [cpims.org](https://cpims.org) / [gbvims.com](https://gbvims.com)