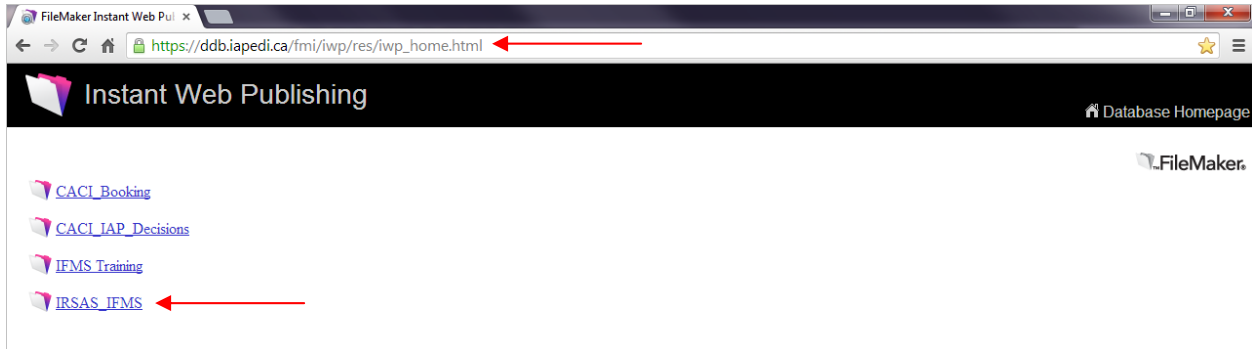


IFMS User Guide

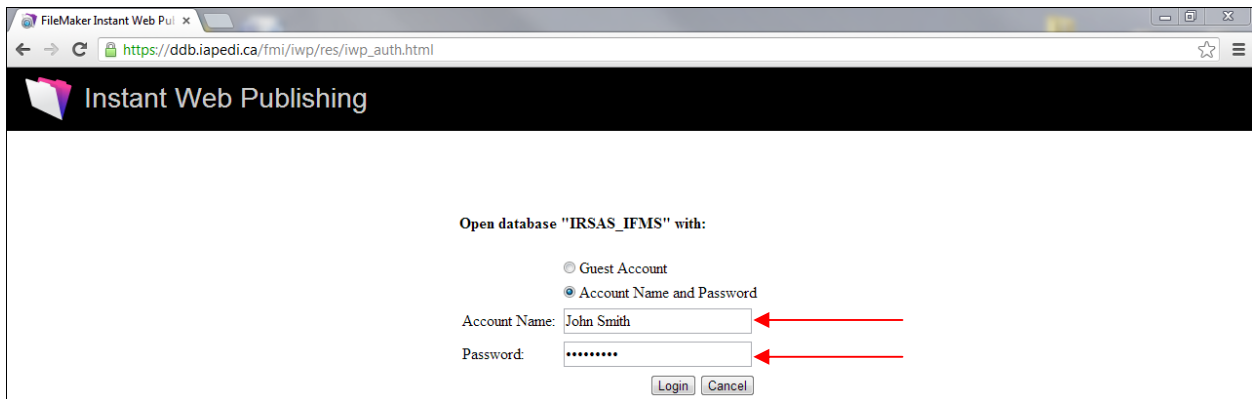
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Logging into IFMS

1. To access IFMS click, or copy and paste, the following link into your internet browser
https://ddb.iapedi.ca/fmi/iwp/cgi?-db=IRSAS_IFMS&-loadframes.
2. Click IRSAS IFMS to be directed to the login screen.



3. Enter the username and password that has been sent to you via Email. Please note that your username is your first name, a space, and your last name. Eg. **John Smith**. Your username is case sensitive.



4. If it is your first time logging into IFMS you will then be asked to change your password.



The IFMS main screen

The screenshot shows the IFMS main screen with the following elements and callouts:

- 1**: Points to the **Firm Information** section.
- 2**: Points to the **RECENT UPDATE** and **TO BE SCHEDULED** buttons.
- 3**: Points to the table of current files.
- 4**: Points to the **Current Files 23** indicator.
- 5**: Points to the search bars for **Claimant Name** and **File Number**.
- 6**: Points to the **Phone:** field.
- 7**: Points to the **Log Out** button.

File Number	Firm Reference #	Claimant Name	Track	Harm Level	LOO Level	Priority	Admit Date	
1	D-99899	Not Provided	Doe, John	Standard	3	2	Requested	05/20/2009
2	S-99999	Not Provided	Smith, Jane	Standard	4	5		09/23/2009
3	B-88888	Not Provided	Brown, Dave	Standard	3	3		10/15/2010
4	M-99919	280116-2801	Mason, Mike	Standard	4	2		11/02/2010
5	M-77777	270506-2701	McCrown, Judy	Complex - Actual Income Loss	3	0		06/10/2008

Features of the main screen are described below:

- 1. Firm Information:** Displays the address, phone and fax number of the firm.
- 2. Recent Update:** Click to view a list of files that have been updated by the Secretariat.
- 3. Link to files:** Click the file number to view the details of that file, see page 4.
- 4. Current Files:** This number indicates how many IAP claims the firm has in the Case Management phase of the IAP process.
 - The list of files can be sorted in ascending or descending order by File Number, Claimant Name, Track, Harm Level, LOO Level, Priority, or Admit Date. Click *Ascending* or *Descending* and then click on the heading of the column you wish to sort by.
- 5. Search bars – Claimant Name & File Number:**
 - Claimant Name Search:** Type the name of a claimant in this section to find their file.
 - File Number Search:** Type a specific file number in this section to find that file.
- 6. Post Hearing:** Click to view all files that are in the Post Hearing phase of the IAP process, see page 8.
- 7. Log Out:** Click Log Out to take you out of the IFMS database and back to the Instant Web Publishing initial login screen.

The IFMS Record Details screen

The screenshot shows the 'Indian Residential Schools Adjudication Secretariat' interface. At the top right is an 'Exit' button (8). Below the header are 'Main Screen' and 'Save' buttons (1). The 'File Information' section (2) includes fields for File Number, Firm Reference, Claimant Name, Date of Birth, Age, Primary Counsel, Acting Counsel, Province, Harm Level, Loss Of Opportunity, Health Priority, Admit date, File Age, Request for Hearing, and Canada's Documents Received. A 'Request to Expedite' button is also present. The 'Document Collection Progress' section (3) features a table with columns: Document Type, Source, #, ETA, Date Requested, Date Received, IRSAS Date Received, Reasons for Delay, and Update. Below the table are 'Document Collection Status Report' and 'Request Report' buttons (4). A text area for 'Any Other Information' is provided (5). At the bottom, contact information for hard copy and electronic documents is listed (6). A 'File Communications' section with an 'ADD NOTE' button is at the very bottom (7).

Features of the record details screen are described below:

1. **Main Screen & Save:** Click *Main Screen* to return to the main screen shown on page 3. Click *Save* to save changes made to the record. The date and time of last save for this record is shown to the right of the save button.
 - **TIP:** To ensure all changes made to the file are committed click *Save* frequently.
2. **File Information:** This section displays various pertinent information such as:
 - Primary and Acting Counsel – Click *Edit* to update the claimant's record to show acting counsel.
 - Firm Reference – can be populated to show an internal reference number. Click *Edit* to add a reference number.

- Request for Hearing – shows the date the request for hearing form was received by the Secretariat.
 - Health Priority – to mark a claimant's file as a health priority click *Request to Expedite*, the word Requested will appear and the Secretariat will be notified. Once the Secretariat has verified the request, the word Yes will appear.
 - File Age – displays the number of days since the claim was initiated.
 - Canada's Documents Received – shows the date that Canada's documents were received.
- 3. Document Collection Progress:** Shows the date documents were received by the Secretariat. Add a new document to the list to notify the Secretariat that you are in the process of collecting the document for the claimant's file.

a. To add a new document:

Document Type	Source	# of Docs	Date Received	IRSAS Date Received	Reason for Delay	Update
Treatment Records				09/2011		
Workers' Compensation Records				09/2011		
Corrections Records				08/09/2011		
Income Tax Records				08/09/2011		
Education Records				08/18/2011		
						Yes

- i. Select the type of document by clicking the drop-down menu.
- ii. Select the source by clicking the drop-down menu.
- iii. Select the number of documents by clicking the drop-down menu.
- iv. Click the calendar to enter an estimated arrival date and then click *Add Document*.

The new document will appear at the bottom of the list.

- 4. Request Report:** Click *Request Report* to receive a report regarding the status of document collection for the claimant's record. The requestor will receive the report via email within 24-48 business hours.
- 5. Any Other Information:** Any related notes can be entered in this section. This note field is open and changes can be made to the note at any time. To add a note or change an existing note, click within the note box and then compose your note. If a note is deleted it is permanently removed from the record. To add a permanent note, enter it in the *File Communications* area.
- 6. Submission Information:** Displays coordinates to submit mandatory documents (client records) by mail, electronically, or by courier.
- 7. File Communications:** Law firms may communicate with the Secretariat by reading, entering and responding to notes in this section. Click *Add Note* to compose and add a note.
 - **TIP:** after 10 minutes of inactivity in IFMS your connection to the website will be lost. Compose your note in a word document and then copy and paste it into File Communications section. Click *Save*, at the top left hand side of the screen, to ensure your note is saved.
- 8. Exit:** Click *Exit* to take you out of the IFMS database and back to the Instant Web Publishing initial login screen.

Intensive Case Management (ICM)

The IFMS Intensive Case Management (ICM) screen

Some files are selected by Case Management to proceed through the Intensive Case Management process or ICM. Clicking on a file number on the IFMS Main Screen that has been selected for ICM will bring you to the following screen in order to complete the ICM form.

The screenshot shows the ICM form interface. At the top, it displays 'Indian Residential Schools Adjudication Secretariat' and 'Secrétariat d'adjudication des pensionnats indiens'. A 'Submit' button is located at the top left. A 'Continue to File Details' link is at the top right. The form contains several sections: 'File Number' (BETA8), 'Claimant Name', 'Primary Counsel' (Carr, Peter), 'Law Firm' (Law), and 'Firm Reference' (Not Provided). A 'Summary' text area is below these. The 'Representation Required' section asks 'Do you currently represent this claimant?' with 'Yes' and 'No' radio buttons. Below this are two text areas for providing details. The 'Lost Contact Required' section asks 'Is an ongoing inability to contact the claimant a contributing factor in this claim?' with 'Yes' and 'No' radio buttons, followed by a date field and a text area for attempts to reach the claimant. The 'File Withdrawal Required' section asks 'Will the claimant be withdrawing?' with 'Yes' and 'No' radio buttons. At the bottom, there is a 'Schedule P Required' section. Numbered callouts 1-6 point to: 1. File Number field; 2. Summary text area; 3. Representation Required section; 4. Vertical scrollbar; 5. Continue to File Details link; 6. Submit button.

Features of the Intensive Case Management screen are described below:

1. File Information: This section displays various pertinent information such as:

- The file number
- The name of the claimant
- Primary counsel associated with the file
- The law firm associated with the file
- The Firm Reference Number if one has been assigned to the file.

Please note that changes to Primary Counsel or Firm Reference cannot be made from this screen. These changes must be made from the IFMS Record Details screen as shown on pages 4-5.

2. Summary: This shows any notes on the file that have been entered by Case Management.

3. Section Title: Shows the title for each section of the ICM Form. The ICM Form has 9 sections for:

1. Representation
2. Lost Contact
3. File Withdrawal
4. Schedule P
5. Additional Allegation Information
6. Track, Harm and Loss
7. Mandatory Document Collection, which includes: Medical/Treatment, Workers Compensation, Income Tax, Corrections and Education
8. Confirmation of Completion
9. Other

Please note that when **Required** appears beside the section title it indicates that all of the information in the corresponding section must be completed before the ICM Form can be submitted.

4. Outstanding Deficiencies: If the Submit button is clicked and there are required sections of the ICM Form that have not been completed, a list of the sections that have deficiencies will populate in this area.

5. Continue to File Details: Click on *Continue to File Details* to bring you back to the IFMS Record Details screen shown on page 4.

6. Submit: Once all of the required sections of the ICM form have been completed click *Submit* to send the completed form back to Case Management for review.

Post Hearing

The IFMS Post Hearing main screen

Clicking the Post Hearing button in the Quick Links section of the main IFMS screen will bring you to the Post Hearing section of IFMS. The Post Hearing section looks similar to the IFMS main screen but all files displayed in this section are in the Post Hearing phase of the IAP process.

The screenshot shows the IFMS Post Hearing main screen. At the top, there are navigation buttons: CASE MANAGEMENT, AVAILABILITY TOOL, POST HEARING, and LOG OUT. A red arrow labeled '6' points to the POST HEARING button. Below the navigation is a blue section for Firm Information, with a red arrow labeled '1' pointing to it. The firm information includes fields for Phone, Fax, and Email, and a dropdown menu for Country (Canada). Below this is a section for Post Hearing File Information, with a red arrow labeled '5' pointing to it. This section contains search fields for Claimant Name and File Number, a SEARCH button, a RESET button, and a display of Current Files (341). A red arrow labeled '3' points to the Current Files count. Below the search fields is a table of files with columns: File Number, Firm Reference #, Claimant Name, Track, Harm Level, LOO Level, Priority, and Admit Date. A red arrow labeled '2' points to the first row of the table. At the bottom of the table, there are radio buttons for Sort Order (Ascending and Descending) and a Next 25 >> button. A red arrow labeled '4' points to the File Number search field.

File Number	Firm Reference #	Claimant Name	Track	Harm Level	LOO Level	Priority	Admit Date	
1	D-99899	Not Provided	Doe, John	Standard	3	2	Requested	05/20/2009
2	S-99999	Not Provided	Smith, Jane	Standard	4	5		09/23/2009
3	B-88888	Not Provided	Brown, Dave	Standard	3	3		10/15/2010
4	M-99919	280116-2801	Mason, Mike	Standard	4	2		11/02/2010
5	M-77777	270506-2701	McCrown, Judy	Complex - Actual Income Loss	3	0		06/10/2008

Features of the Post Hearing main screen are described below:

1. **Firm Information:** Displays the address, phone and fax number of the firm.
2. **Link to Records:** Click the file number to view the details of that file.
3. **Current Files:** This number indicates how many IAP claims the firm currently has in the Post Hearing stage of the IAP process.
 - o The list of files can be sorted in ascending or descending order by File Number, Claimant Name, Track, Harm Level, LOO Level, Priority, or Admit Date. Click to select *Ascending* or *Descending* and then click on the heading of the column you wish to sort by.
4. **Claimant Name Search:** Type the name of a claimant in this section to find their file.
5. **File Number Search:** Type a specific file number in this section to find that file.
6. **Quick Links:** Use the buttons in this section to navigate to other sections of IFMS.
 - o Click **Case Management** to navigate back to the main IFMS screen shown on page 3.
 - o Click **Log Out** to take you out of the IFMS database and back to the Instant Web Publishing initial login screen.

Post Hearing Record Details screen

Once you have clicked on a file number on the Post Hearing main screen it will take you to the Post Hearing Record Details screen shown below.

The screenshot shows the 'Indian Residential Schools Adjudication Secretariat' interface. At the top, there are navigation buttons for 'Main Screen' (1) and 'Save', and an 'Exit' button (5). Below this is a status bar with 'Current Status' and 'Hold Pending Archive' (3). The 'File Information' section (2) includes fields for File Number, Claimant Name, Date of Birth, Age, Firm Reference, Primary Counsel, Acting Counsel, Province (Ontario), Request for Hearing, and Canada's Documents Received. It also shows 'Harm Level' (3), 'Loss Of Opportunity' (3), 'Health Priority', and 'Admit date' (02/04/2008) with a 'File Age' of 2032 days. A table (4) below contains 'Post Hearing Information', 'Person of Interest (POI) Information', 'Expert Assessment Information', 'Decision Information', and 'Review Decision Information' with various dates and status indicators.

The Post Hearing Record Details screen is a read only screen that displays a variety of information relating to the post hearing process. This includes information such as outstanding documents, information that is required, dates of key milestones and dates for key deadlines. A further breakdown of the features of the post hearing record details screen is described below:

1. **Main Screen:** Click on *Case Management* to navigate back to the main IFMS screen shown on page 3.
2. **File Information:** This section displays various pertinent information such as:
 - The file number
 - The name of the claimant

- The claimant's date of birth and age
- The primary and acting counsel associated with the file
- The Firm Reference Number if one has been assigned to the file
- If a request for a hearing has been made
- The Track
- The Harm and Loss of Opportunity Level
- The claimant's health priority
- The admit date and file age

Acting Counsel and Firm Reference can be edited on this screen. All other fields are locked.

3. Current Status: Shows the current status of the file.

4. Post Hearing Information: Shows information that relates to files that are in the post hearing stage.

The information includes:

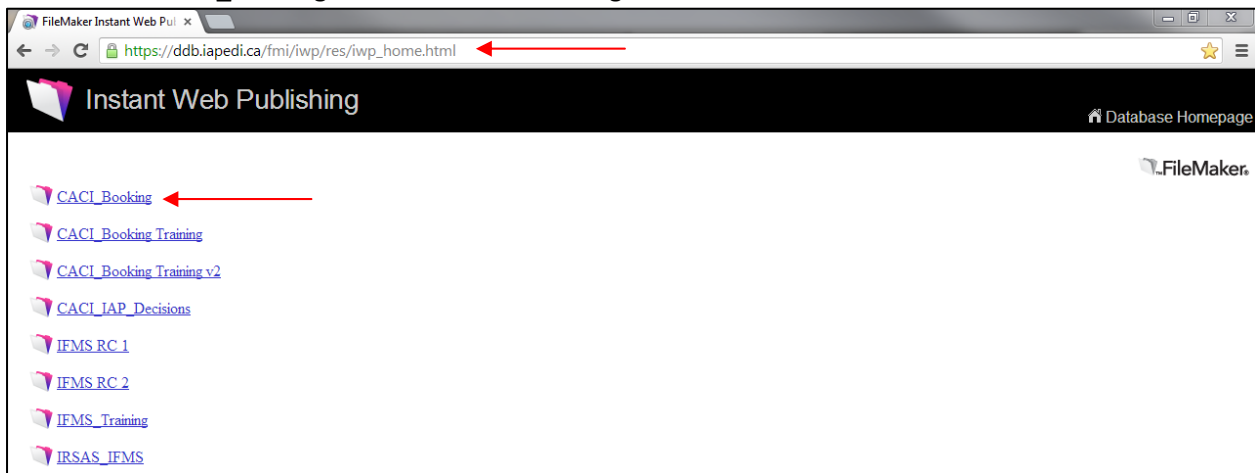
- If documents are outstanding
- Required information that is outstanding
- Person of Interest (POI) information
- Expert assessment information
- Decision information
- Review decision information
- Re-review decision information
- Legal fee ruling information
- Legal fee appeal information

5. Exit: Click *Exit* to take you out of the IFMS database and back to the Instant Web Publishing initial login screen.

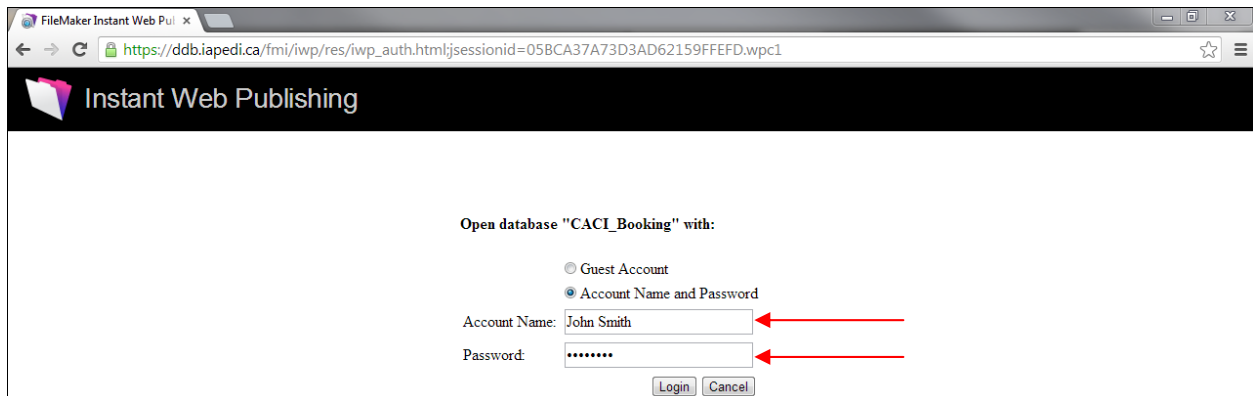
The Booking tool

Logging into the Booking tool

1. To access the booking tool click, or copy and paste, the following link into your internet browser https://ddb.iapedi.ca/fmi/iwp/cgi?-db=IRSAS_IFMS&-loadframes.
2. Click CACI_Booking to be directed to the login screen.



5. Enter the username and password that has been sent to you via Email. Please note that your username is your first name, a space, and your last name. Eg. **John Smith**. Your username is case sensitive.



3. You will then be directed to the Availability Tool main screen shown on the following page.

Booking tool main screen

The Booking tool is used to:

1. Enter your availability for future hearings.
2. View scheduled hearings.
3. Complete the Logistics Form in preparation for hearings.

The Booking tool calendar opens to the current month by default. Scheduled hearings and dates that you mark as unavailable will be displayed.

Français							November - 2013		Exit	
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday				
			1		1	2	2			
3	4 D-10000-100 Mile House BC	5 D-10000-Ajax ON	6 D-10000-Anzac AB	7 D-10000-Arborg MB	8 D-10000-Archerwill SK	9				
10	11	12	13	14	15 Not Available - Jane Law	16				
17	18 Not Available - Jane Law	19	20	21	22	23				
24	25	26	27	28	29	30				

1. **Navigation:** To go to a different month use the arrow on the left to go back in the year and the arrow on the right to go forward in the year.
2. **Exit:** Click *Exit* to take you out of the IFMS database and back to the Instant Web Publishing initial login screen.

3. Enter availability: To enter your availability click a date which you wish to mark as **Not Available**. If you have clicked an incorrect date or would like to later change the date to show as available simply click the date again and the **Not Available** tag will be removed.

TIP: Do not use your browser's back button when entering availability as this may cause you to lose your connection to the site.

4. Logistics Form: Click on a hearing and the Logistics Form opens.

a. Click on the line next to "Claimant's current mailing address" to begin typing and filling out the form.

TIP: after 10 minutes of inactivity your connection to the website will be lost. Click the *Save* button at the bottom of the form frequently to ensure your information is saved.

b. When you have reached the end of the form click *Save* and then click *Submit*. You may also click *Save* if you would like to return to the form at a later date to complete it.

c. If you wish to go back to the Availability Tool main screen click *Save* at the bottom of the screen and you will then be prompted to return to the calendar.

<small>Indian Residential Schools</small> Adjudication Secretariat / Secrétariat d'adjudication <small>des pensionnats indiens</small>	
Logistical Requirements Form PROTECTED B when completed for Hearings in the Independent Assessment Process (IAP)	
IAP File Number: <u>D-10000</u> Date this form was completed: <u>11/04/2013</u>	
Claimant's name (as it appears on their Government Issued I.D.): <u>Doug test</u>	
Claimant's current mailing address: _____	
Venue Location : What is the Claimant's preferred venue for this hearing? <small>If a specific venue/location is preferred, be sure to note it here. If no preference is listed, Hearings Management may not approve requests to change a venue once booked. (If the hearing is to be held at a Claimant's residence due to exceptional circumstances, please provide specific and detailed directions/address).</small>	City/Community: _____ Preferred venue: _____ Justification: _____ <small>(If you do not indicate a preferred venue, changes based on preference may not be made once the notice of hearing has been sent)</small>
Pre-Hearing Meeting between Legal Counsel and Claimant: Is a pre-hearing meeting scheduled? <input type="radio"/> Yes <input type="radio"/> No <small>Hearings Management will endeavor to book travel plans that accommodate a request for Legal counsel to meet with Claimants on the afternoon prior to the hearing date, when the request is made via this form at least 8 weeks prior to the hearing date. If Legal counsel plans to meet with the Claimant on the afternoon prior to the hearing date, you must indicate the time of the scheduled appointment here.</small>	<small>(note: IRSAS is not responsible to arrange, pre-pay or reimburse for pre-hearing meeting space; this is the responsibility of legal counsel, should they wish a pre-hearing meeting to occur.)</small> Date of hearing: _____ Date/Time of pre-hearing meeting: _____ Location of pre-hearing meeting: _____

Indian Residential Schools

Adjudication Secretariat

Secrétariat d'adjudication
des pensionnats indiens

Your Logistical Requirements Form has been updated successfully.

Thank You.

Calendar

Exit