



TRV Journey Lab ::
Chinook+ & GCMS Chinook Tab
USER MANUAL v.3

Table of Contents

Table of Contents	2
Revisionist History	3
Contact.....	3
New tools at a glance	4
Chinook +	4
GCMS – Chinook Tab	4
Set up and get started	5
Chinook+ :: What's New	8
GCMS Chinook Tab :: It's All New.....	18
Troubleshooting	23
Issue	23
Workaround	23
ANNEX A	24
ANNEX B	27
Final Decision Logic - TRV	27
Final Decision Logic - SP	28
Final Decision Logic – SP-EXT	29
Final Decision Logic - WP	30
Final Decision Logic – WP-EXT	31
ANNEX C	33
Eligibility Logic	33

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

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:


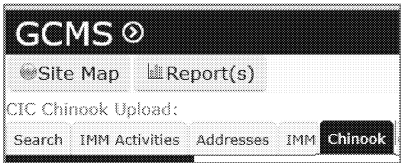
Using the new tools, decision-makers can now automate tasks that were previously done manually such as:

- 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

3. Automate Biometrics Administrative tasks:

Decision-makers can now indicate their Biometrics decision in Chinook, and the entry will be automated in GCMS

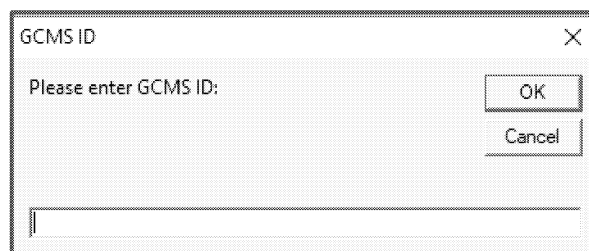
To take advantage of the new features, you will need access to two new tools:

Tool	Description
Chinook + 	<ul style="list-style-type: none"> ▪ New version of Chinook that includes new functionality including: <ul style="list-style-type: none"> ○ New Biometrics Action column ○ New functions in Action column ○ Export to GCMS button ○ Support for TRV/SP/WP/SP-EXTs
GCMS – Chinook Tab 	<ul style="list-style-type: none"> ▪ 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

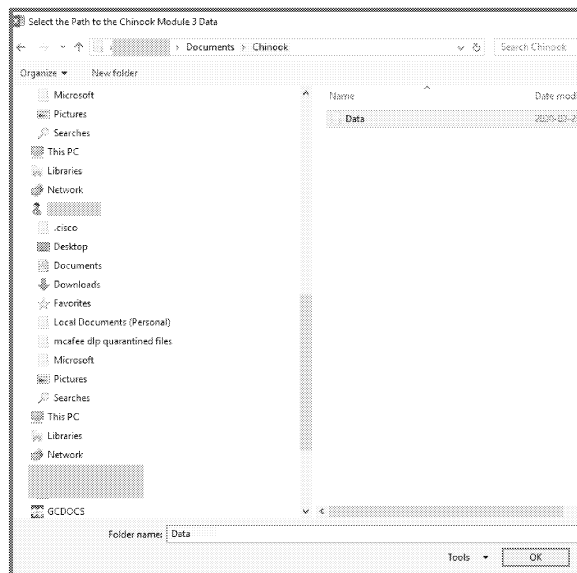
Set up and get started

Prepare Chinook +

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



**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

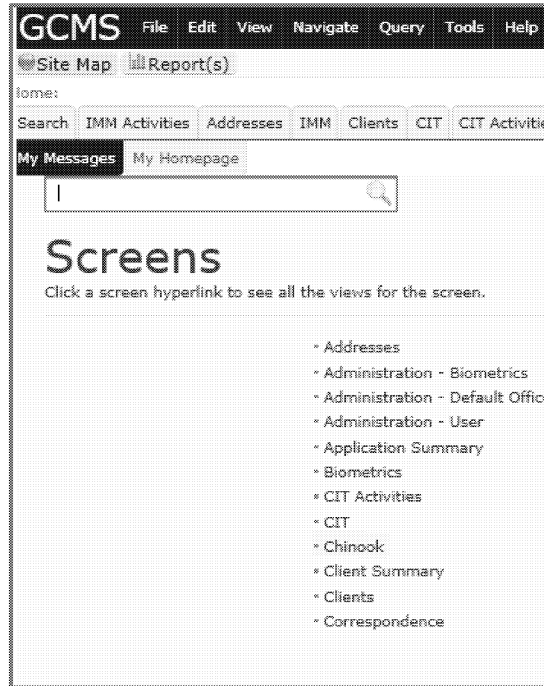
6. **Set up your Selected Region and GCMS ID:**

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.

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



Chinook+ :: What's New

1

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.

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.

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.

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.

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.

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.

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)

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).

Sent to GCMS

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

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

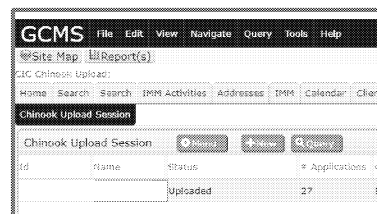
- Paste data here after clicking “Export to GCMS” button in Chinook

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

s.16(1)(c)

s.19(1)

Using the Process Chinook Data button

- 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.

Chinook Upload Session								
Chinook Upload Session								
Menu New Query								
Id	Status	# Applications	# Approvec	# Refusec	# Withdraw	# Errors	Errors	Elapsed Time
	Uploaded	1	0	0	0	0		
	Complete - Error	1	0	0	0	1		2 seconds
	Error - Upload Failed	1	0	0	0	0	Upload fa...	
	Complete - No Error	8	2	4	2	0		30 seconds

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.

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:

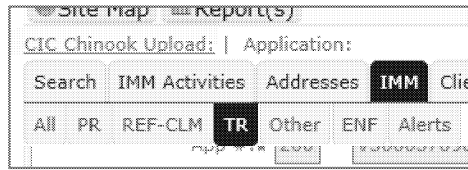
Fixing Application Errors

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

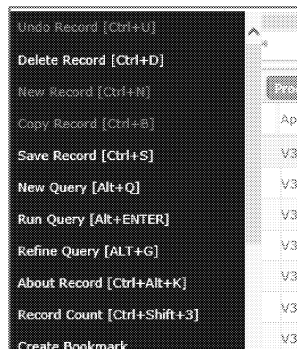
Upload Status	Error Details	Application Number	CK Elg.	Dec.	Upload
Complete - Error					
Error - Upload Failed					Upload
Error	Biometrics Assessment is required.				
Error	Biometrics Assessment is required.				Passed
Error	Final Decision already exists in application				
Error	Final Decision already exists in application				
Error	Final Decision already exists in application				Failed
Error	Final Decision already exists in application				Failed
Error	Final Decision already exists in application				Failed
Error	Final Decision already exists in application				Failed

Deleting Applications from a Session

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



- Click the Process Chinook Decisions button, and all applications that are not at *Status= Complete* will be re-processed.
- To delete an application from a Session, highlight the application(s) and click *Menu>Delete Record*.



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:

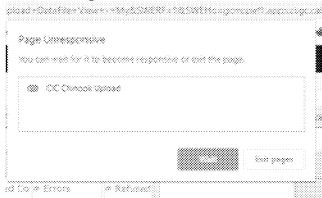
Issue

Workaround

The buffer wheel disappears and it looks like the Chinook session has crashed.

In GCMS, the buffer wheel automatically disappears after 60-90second. Unfortunately, this isn't something we could easily fix.

OR Chrome gives me this Page Unresponsive message:



So **trust it and let it run** – the Session Status will change to Complete – No Error or Complete – Error once it's done.

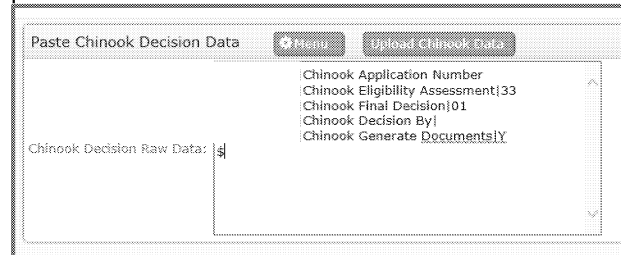
Do not click the Process button again as this will actually make it crash.

When I paste my information from Chinook into the Chinook Raw Data window, I see a \$ and then some other symbols:

To avoid errors in the Chinook Tab, ensure that there are no extra characters or spaces after you paste in the Chinook Data window:

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
```



Delete all extra characters and spaces after the \$.

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	

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	Additional Info – see GCMS
NZL Pending	
AUS pending	
USA/NZL/AUS pending	
USA/NZL pending	
USA/AUS pending	
NZL/AUS pending	

COMPLETE (COUNTRY)	COMPLETE
<i>OR</i>	
ALL COMPLETE	

(COUNTRY) NRT	ALL NRT
<i>OR</i>	
ALL NRT	

EXEMPT (COUNTRY)	ALL EXEMPT
<i>OR</i>	
ALL EXEMPT	

INCOMPLETE FINGERPRINT (COUNTRY)	INCOMPLETE
<i>OR</i>	
INCOMPLETE NOT STARTED	
<i>OR</i>	
ALL INCOMPLETE	

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

ANNEX B

Final Decision Logic - TRV

		Final Decision		
Activity/Field 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	Ppt Request Itr = Generate	Refusal Letter = Generate	No letter generated – cannot automate letters that have to be picked from the T:Drive
		Ppt Request Itr = Sent	Refusal Letter = Sent	
		Ppt Request Itr = 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

Final Decision Logic - SP

		Final Decision		
Activity/Field 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

Final Decision Logic – SP-EXT		Final Decision		
	Activity/Field 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
	Refusal Letter Details>Paragraph Type		Refusal Letters Details> Paragraph Type based on Chinook entry	
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	N/A	N/A
		Set Validity Date		
		Counterfoil = Generate		
		eTA = Authorized		
Permit	Finalize Application >Document Issuance>Type = Permit – SP	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 :		Set Study Permit to Authorized	N/A	Send withdrawal letter

Final Decision Logic - WP

		Final Decision		
Activity/Field 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
	Refusal Letter Details>Paragraph Type		Refusal Letters Details> Paragraph Type based on Chinook entry	
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	N/A	N/A
		Set Validity Date Counterfoil = Generate eTA = Authorized		
Permit	Finalize Application >Document Issuance>Type = Permit – WP	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
--	--	--	------------------------

Final Decision Logic – WP-EXT

		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
	Refusal Letter Details>Paragraph Type		Refusal Letters Details> Paragraph Type based on Chinook entry	
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	N/A	N/A
		Set Validity Date		
		Counterfoil = Generate		
Permit	Finalize Application >Document Issuance>Type = Permit – WP-EXT	eTA = Authorized		
		Set Validity Date	N/A	N/A
		User Remarks based on Chinook entry		
Things GCMS won't let us automate that you'll still have to do :		Conditions based on Chinook entry		
		If Received Via Other/VAC = set letter to Sent	If Received Via Other/VAC = set letter to Sent	Send withdrawal letter

--	--	--	--

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 Failed	No actions will be completed. Will return Error to Officer.	"Eligibility is Not Met" "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 Failed	No actions will be completed. Will return Error to Officer.	"Eligibility is Not Met" "Eligibility is Failed"



MODULE 3: Decision Maker Module

USER MANUAL v.3

Table of Contents

Table of Contents	2
Revision History	3
Contact.....	3
What is Module 3 - Decision Maker Module?	4
Set up and get started	4
GCMS	4
Hot Key	9
Function	9
Inputting & Reviewing Applications in Module 3.....	10
Finalizing Application in Chinook.....	16
Creating Action Lists.....	20
Using Action Lists with GCMS.....	21
2. Best Practice for Approvals/Withdrawals – GROUPS.....	21
Best Practices for Paper Applications	25

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

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

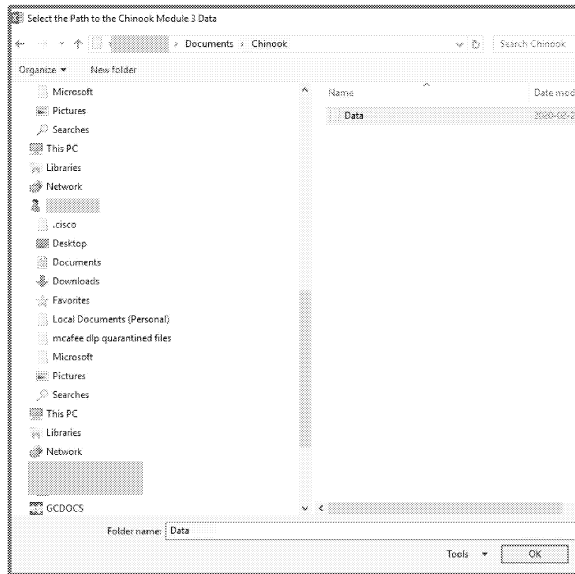
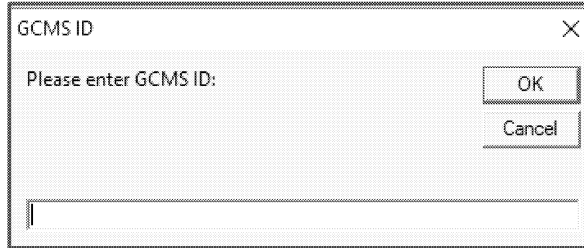
1. For best results, organize workstation so that you have one monitor in a landscape orientation (to be used with Chinook) and your other in Portrait (to be used for GCMS).

Set-up for Chinook Module 3


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

Data Path

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



Using the Settings button

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

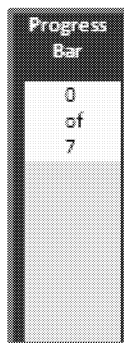
8. Basic Setup Tab :: User Info

Using the
Settings
button
(continued)

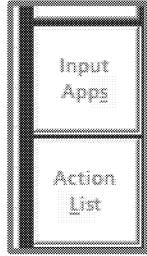
11. **Column Setup Tab:** Use the checkboxes to customize the Module 3 columns displayed. Unchecking a box will hide that column from view.
 - Ex. If your office does not conduct pre-assessment, hide this field to save space on your screen.

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.



See below for some examples:

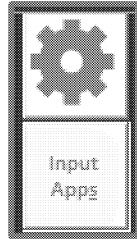
Hot Key	Function
Home/Debut	Will return your viewer back to Column F.
ALT+D	Open Display Popup
ALT+L	Launch Action List
ALT +S	Launch Input Apps Window

Inputting & Reviewing Applications in Module 3

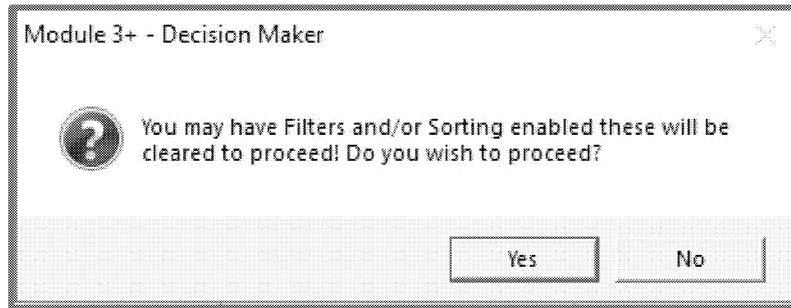
Inputting Apps

1. Input Applications

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

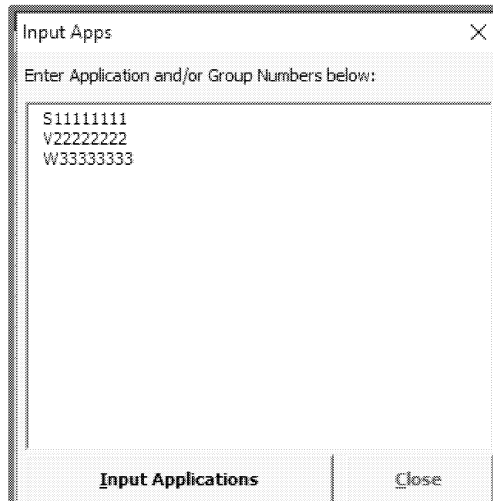


- A warning message will pop-up advising that any filters/sorting currently used on the Module 3 sheet will be cleared. Click *Yes* to proceed.



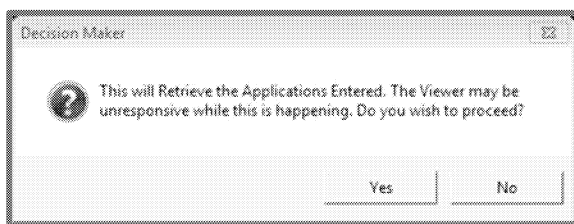
- Enter Application numbers and/or Group numbers in the Input Apps window when prompted. Click *Input Applications* when complete.

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

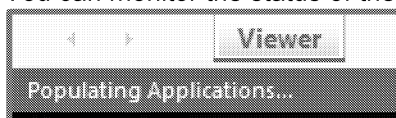


Inputting Apps (continued)

- 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.

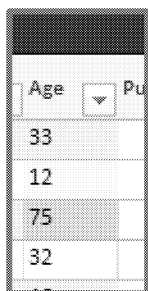


- You can monitor the status of the data upload in the bottom left-hand corner of the Excel screen.



Reviewing Applications

- 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.



Age	Pu
33	
12	
75	
32	

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.

Activity & Employer/School/Facility

2018/08 to 2019/12 - SELF EMPLOYED @ [REDACTED] LIMITED -

2010/09 to 2016/05 - Student / Étudiant @ [REDACTED]

2018/04 to ####/## - Business Owner (Car Rentals) @ [REDACTED]
[REDACTED] - Trinidad and Tobago [REDACTED]

2016/11 to ####/## - Operational Manager @ [REDACTED]
[REDACTED] - Trinidad and Tobago [REDACTED]

2013/01 to 2016/06 - Student / Étudiant @ [REDACTED]
[REDACTED] Nigeria (Ekpoma, Edo state, Nigeria) - [### - [REDACTED]

StatQs (positive answer)

TR 2014/06 : Have you ever been

TR 2014/06 : Have you ever been

TR 2014/06 : Have you ever been

TR 2014/06 : Have you ever been refused a visa or permit, denied entry or ordered to leave Canada or any other country?
Add Details: 2b: 2b)

- **Previous GCMS History:**

Reviewing Applications (continued)



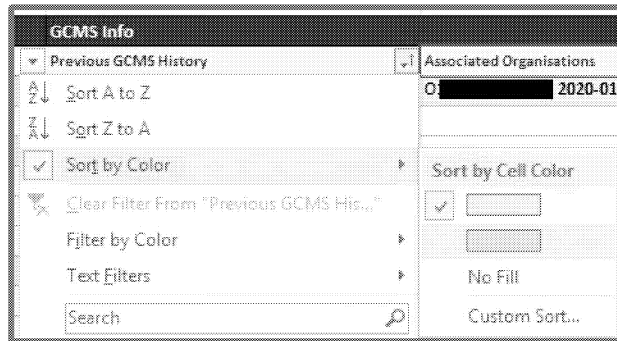
Sorting & Filtering

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.
 -

Sorting & Filtering (continued)

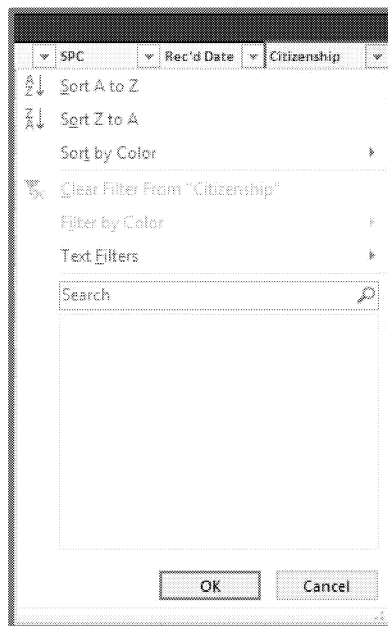


- **Multilayered Sort:** To combine different elements, click the down arrow and select "Sort by Color" (even if there are no colors) and then click "Custom Sort". This will provide options to run a multilayered sort first sorting by one column, and then another within that initial sort.

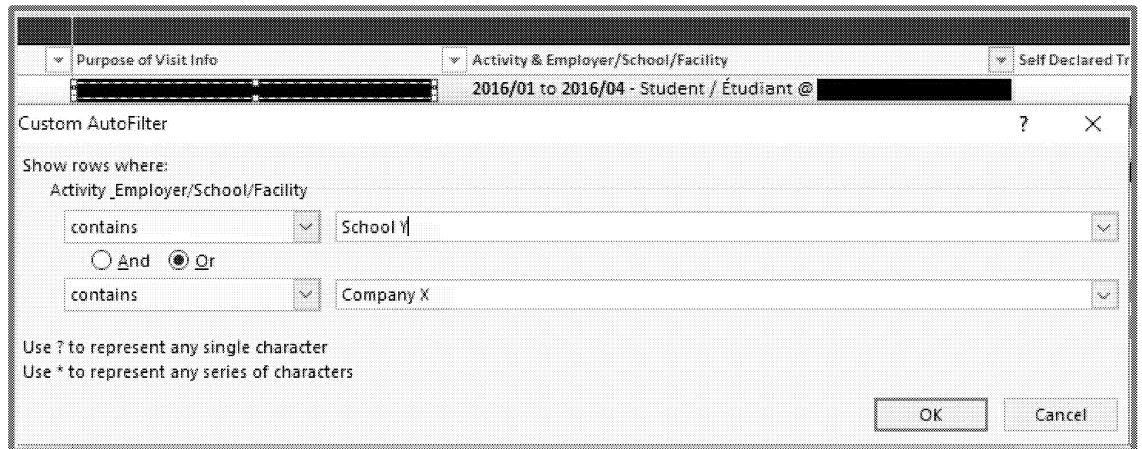
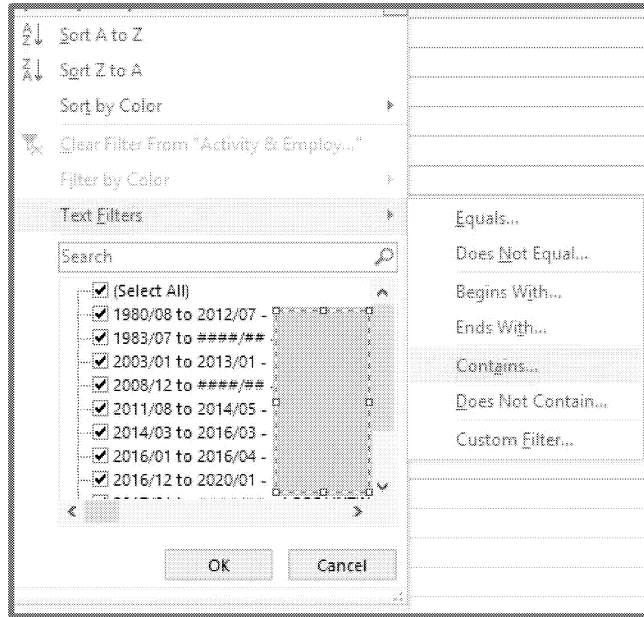
NOTE: Be careful when sorting and filtering that you don't accidentally split groups (by applying filters that do not apply to all members of that group).

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.



Sorting & Filtering Continued)



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.

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.

Officer Section		
Application #	Group #	Action
S3	2-S	Approval
V3		
W3	2-S	
W3		
V3		
V3		
V3		

Officer Section		
Application #	Group #	Action
S3	2-	Approval
V3		Approval
W	2-	Approval
W		Approval
V3		Approval
V3		Approval
V3		Approval

- 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*

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*

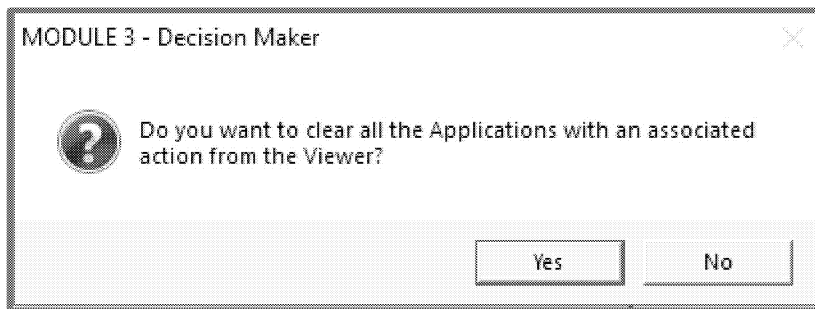
Using the
Action
Column
(continued)

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*

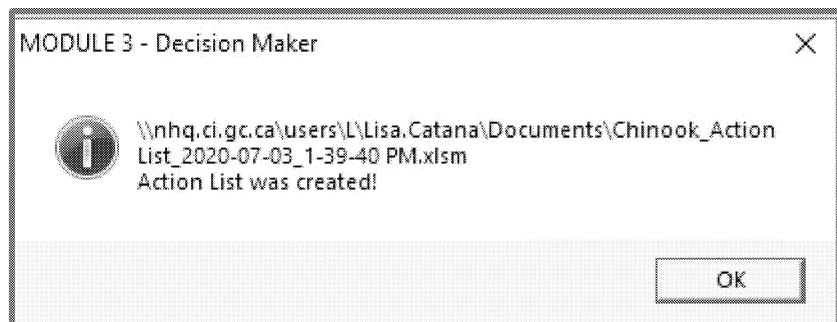
Creating Action Lists

Using the Action List Button

- 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
- 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.



- 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**



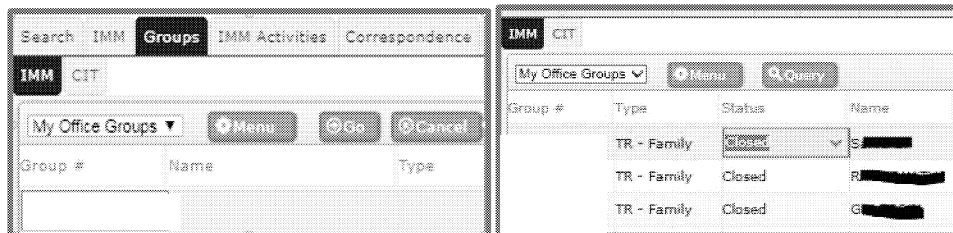
- A new worksheet will automatically open for the action lists. Each tab of the worksheet will represent a different action:



Using Action Lists with GCMS

Action List
Overview

Approval or
Withdrawal
Action Lists



Refusal
Action Lists

Other
Action Lists

Other
Action Lists
(continued)

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.

7/13/2020 11:29 AM
7/12/2020 1:13 PM
7/12/2020 1:14 PM
7/10/2020 1:50 PM
7/13/2020 12:49 PM
4/3/2020 4:23 AM
7/9/2020 2:48 PM
7/8/2020 1:51 PM
7/8/2020 9:04 AM
7/10/2020 12:55 PM

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.

Best Practices for Paper Applications

Processing
Paper
Applications
in Chinook