

Social Welfare

INFORMATION MANAGEMENT SYSTEM (SWIMS)

USER MANUAL
December 2025



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(SWIMS)**

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Primero



USAID
FROM THE AMERICAN PEOPLE

unicef
for every child

FOREWORD

The Government of Ghana, through the Ministry of Gender, Children and Social Protection (MoGCSP) in collaboration with development partners UNICEF and USAID embarked upon the journey to strengthen child protection information management by building the Social Welfare Information Management System (SWIMS) using a software called Primero. SWIMS has been developed to support the critical work of protecting children and individuals in need of care and protection, and ensuring their rights are upheld in our communities. SWIMS is a vital tool that helps the social service workforce including child protection professionals, social workers, and other stakeholders in our country to efficiently manage and respond to protection violations and cases of abuse, neglect, exploitation, and other forms of harm occurring within our country.

As we continue to work toward safeguarding the welfare of children and individuals at risk, it is essential that we use technology to strengthen our efforts and improve the coordination and effectiveness of our services. SWIMS provides a centralized platform for data management, case tracking, and reporting, which will allow us to make better-informed decisions, advocate for and allocate timely human and financial resources, strengthen the capacity of the national social service workforce, streamline processes, and ultimately improve outcomes for vulnerable children.

This manual is designed to guide users through the features and functions of SWIMS. Whether you are new to the system or are looking for specific instructions on how to use certain features, this guide will provide clear, step-by-step instructions to ensure that you can make the most of this powerful tool.

We encourage all users to familiarize themselves with the system, understand its capabilities, and use it responsibly and ethically. The information entered into SWIMS is sensitive and must be handled with the utmost care, in accordance with the best practices for child protection and privacy. We also emphasize the importance of continuous training and feedback to ensure the system remains a valuable resource in our collective efforts to protect children.

Together, we can create a safer, more secure environment for our children, and SWIMS is an important part of that vision. We thank you for your dedication and commitment to the safety and well-being of children and communities of our country.




Hon. Dr. Agnes Naa Momo Lartey
(Minister)
Ministry for Gender, Children & Social Protection

December 2025

DOCUMENT ACCEPTANCE AND RELEASE NOTICE

This is **version 2.0** of the **Social Welfare Information Management System - User Manual**, produced for the Ministry of Gender, Children and Social Protection with technical and financial support from UNICEF Ghana and USAID respectively. This manual is a living document, with updates to be made as and when new releases, features and functionalities are activated in SWIMS. For identification and amendments, this document contains a revision history, and each page contains a version number and page number. Changes will only be issued as a complete replacement document. This document is authorized for release once the signature has been appended by an authorized representative of the Ministry of Gender, Children and Social Protection.



ACCEPTED: _____

DATE: 30/12/2025

Dr. Afisah Zakariah
(Chief Director)
Ministry of Gender, Children and Social Protection

REVISION HISTORY

Date	Version	Description
Aug 2020	1.0	Base draft by UNICEF Primero Team
Oct 2025	2.0	Addition of RHC Registry section; updated visuals based on System Version 2.14.1 by UNICEF Ghana

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This milestone is the culmination of a profound and collaborative effort. We extend our deepest gratitude to the Honourable Minister and the leadership of the Ministry of Gender, Children and Social Protection and UNICEF for their unwavering support and partnership throughout this journey.

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Special recognition is due to the previous and current SWIMS Technical Team consisting of MoGCSP and UNICEF technical specialists whose exceptional dedication, expertise, and countless hours of work have been instrumental in bringing learnings from past training sessions to this user manual: Dr. Afisah Zakariah and Florence Ayisi-Quartey from MoGCSP; Felix Logah from the School of Social Work, DSW-HQ; Dr. Sylvester Kyei-Gyamfi and Steve Twumasi from RSIM, MoGCSP; Dr. Prince Boamah Abrah, Fred Sakyi Bofo and Georgina Mensah from DSW-HQ; Young Joo Lee, Lucia Soleti, Muhammad Rafiq Khan, Dr. Antoine Deliege and Won-Dan Choi from UNICEF Ghana; and Robert MacTavish from UNICEF Primero Team. This manual was made possible with financial support from USAID and UNICEF. The content does not necessarily reflect the views and positions of USAID, the Government of the United States of America or UNICEF.

Furthermore, we express our sincere appreciation to the Office of the Head of Local Government Service, the Departments of Social Welfare and Community Development, and all dedicated partners and stakeholders across the social service, child protection and family welfare ecosystem. Your collaboration is the foundation upon which stronger, safer communities are built.

This manual marks our vital commitment and continuing journey to equipping our frontline social service professionals with the standardized tools and knowledge necessary to safeguard the wellbeing of every child, family and community in Ghana.

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ACRONYMS

API	Application Programming Interface
CPIMS+	Child Protection Information Management System
CSV	Comma-separated values
DMTDP	District Medium Terms Development Plans
DOC	Department of Children
DSW-HQ	Department of Social Welfare - Headquarters
DSWCD	Department of Social Welfare and Community Development
DSWCDO	Department of Social Welfare and Community Development Officers
GNHR	Ghana National Household Registry
ISS	Integrated Social Services
JSON	JavaScript Object Notation
LEAP	Livelihood Empowerment Against Poverty
MDA	Ministries, Departments and Agencies
MMDA	Metropolitan, Municipal and District Assemblies
MOGCSP	Ministry of Gender, Children and Social Protection
NCM	National Case Manager
NDPC	National Development Planning Commission
NGO	Non-Governmental Organization
NHIS	National Health Insurance Scheme
NPO	National Protection Officer
NPO	Non-Profit Organization
NSA	National System Administrator
OHLGS	Office of the Head of the Local Government Service
PPMED	Policy, Planning, Monitoring and Evaluation Division
PWA	Progressive Web Application
RCC	Regional Coordinating Council
RHC	Residential Homes for Children
RSIM	Research, Statistics and Information Management
SER	Social Enquiry Report
SOP	Standard Operating Procedure
SWIMS	Social Welfare Information Management System
UNICEF	United Nations Children’s Fund
XLS	Excel spreadsheet

INTRODUCTION

Developing case management and information management systems and improving the delivery of social and child protection and other social services are national priority areas for the Government of Ghana as per the National Medium-Term Development Policy Framework 2018-2021¹ (Focus Areas 7 and 10). These areas have been identified to address ineffective inter-sectoral coordination of social services including social protection, child protection and family welfare, poor quality of social welfare services, and the lack of consistent data around provision of these services at the Metropolitan, Municipal and District Assembly (MMDA) level.

Further, the Child and Family Welfare Policy noted the lack of coordinated approach to data management as a challenge in 2015. It noted, “child and family welfare information management systems are weak, and there are no mechanisms for consistent, on-going information sharing and data analysis between agencies involved in child and family welfare.” The policy further “highlights the need for improving the overall child protection information management system for better data and evidence of impact of the expected system reform.”

While considering Ghana’s combined third to fifth periodic reports, the Committee on the Rights of the Child urged the Government of Ghana to “expeditiously improve its data collection system. The data should cover all areas of the Convention and should be disaggregated among others by age, sex, disability, geographic location, ethnic origin and socio-economic background, to facilitate analysis about all children, particularly those in vulnerable situations.”

Currently several management information systems (MIS) exist at district and community level that collect pertinent information about the welfare of children in Ghana. Such systems include the Community Health and Nutrition Information System, the Education Management Information System, the Livelihood Empowerment Against Poverty (LEAP) MIS and the Ghana National Household Registry (GNHR), among others. However, none of these systems talk to each other or enable reliable tracking of individual children and/or families as they access various services. This situation makes it very difficult for social welfare officers to make referrals for vulnerable children and families or follow up on access to services, a key component of a robust and effective social welfare system.

Since 2015, the Department of Children (DOC) and the Department of Social Welfare (DSW) and UNICEF have been working to put different pieces in place for a case management system including an information management system to facilitate the provision of social services by the Department of Social Welfare and Community Development (DSWCD) at the MMDA level and to streamline the referral and reporting on the provision of social services. Led by its Policy, Planning, Monitoring and Evaluation Division (PPMED) and the Research, Studies and Information Management (RSIM), the Ministry of Gender, Children and Social Protection (MoGCSP) led the development of a Social Welfare Information Management Systems (SWIMS). SWIMS adopted a software called “Primero” which was developed by UNICEF globally. Primero software has several default features, standard forms, access controls, geographical, naming conventions and reporting dashboards. UNICEF has supported MoGCSP to configure the software

¹ See Social Development - Focus Areas 7 and 10.

as per the needs in Ghana, run user acceptance tests, incorporate feedback into the software and adjust access control.

The system will help foster accountability, supporting the MoGCSP and the Department of Social Welfare, to monitor and report on the work of social welfare workers and help to generate evidence for programming and policy at national, regional and district levels. The system will also help the MMDAs, the Regional Coordinating Councils (RCCs), the Office of the Head of Local Government Service (OHLGS) and the National Development Planning Commission (NDPC) to keep track of the implementation against key result indicators related to social protection and child and family welfare issues included the District Medium Terms Development Plans (DMTDPs). The data generated by SWIMS will only be reliable and up to date if all DSWCD Officers (DSWCDO) manage their cases through the system. Being a tool developed by the Government of Ghana to improve the delivery of social services, it is mandatory for each DSWCDO to use SWIMS for managing cases.

Located at PPMED and RSIM of MoGCSP, the System Administrators will provide technical support to the Ministry to oversee the entire technical implementation of the SWIMS. This role has the ultimate responsibility for the maintenance of the SWIMS software, the data it carries, the case management work it enables and to ensure that the technology infrastructure runs smoothly and efficiently. The system administrators are in charge of the coordination of the progressive roll out of the system in 260 districts. The system administrators also regularly monitor the implementation, document good practices and lessons learned.

SWIMS functions as a Progressive Web Application (PWA) with support for offline usage. To meet operational challenges, it was designed to function both on- and off-line, with limited or no connectivity, and in multiple deployment configurations. It must be noted that offline usage as such is limited to certain features. A stable internet connection is therefore recommended for full functionality of the application, which can also be accessed via the web on devices such as tablets and phones.

SWIMS has a user-friendly interface and intuitive tools, facilitating the work of field personnel while decreasing security risks and duplication. In addition to exports in several formats, SWIMS has a highly secure application program interface (JSON API), which facilitates interoperability with other systems. SWIMS is flexible and adaptable to accommodate a broad range of protection concerns. The forms built into SWIMS are configured to the in-country forms currently being used and aligned to standard operating procedures currently in practice.² In child protection interventions, referrals and case transfers are critical to effective service provision. Sharing sensitive information is a part of good programming. Data exchanges between organizations should be governed by endorsed information sharing protocols adapted to local contexts.

SWIMS functions as a distributed database, meaning that implementing partners can retain ownership of data while contributing and sharing information on shared programmes. A strong emphasis has been placed on security and confidentiality, with intuitive workflows designed to simplify processes while promoting good practice. Role-based access and granular security ensures that only those who need to see data will have access to it. All system transactions are time stamped, password protected and encrypted.

² Refer to the Case Management Standard Operating Procedures for children in need of care and protection and its standardized forms. <https://www.mogcsp.gov.gh/department-of-social-welfare/>

SWIMS design is based on the “need to know” principle as it does not impose data sharing, but facilitates the process when consent is provided, and when it is deemed appropriate and safe by partners.³

Good information management practice emphasizes the importance of making data actionable. SWIMS has built-in customizable reports that can facilitate periodic reporting processes and be used to analyze data for programmatic insights. A document and photo repository allows end users to organize relevant resources in one convenient place.

The purpose of this user guide is to outline all features and functionality available in SWIMS for different user roles, notably the DSWCD Caseworker, DSWCD Case Manager and DSW Regional Case Manager. This user guide can also be referenced by the RHC Registry Manager, DSW National Case Manager, National Protection Officer (Statistics Only) and the National System Administrator at the national level. Additionally, all other district-level roles may also find this guide useful, such as DSW Institution Case Worker and Case Manager, DSW Institution Supervisor and Service Provider, and NPO Supervisor and Service Provider.

³ Refer to the Protocol for Inter-sectoral Data Protection and Information Sharing of the Inter-Sectoral Standard Operational Procedures for Child Protection and Family Welfare; p.131.: <https://www.unicef.org/ghana/reports/inter-sectoral-standard-operating-procedures-child-protection-and-family-welfare>

GETTING STARTED

SWIMS can only be accessed by registered users with approval from the Ministry of Gender, Children and Social Protection (MoGCSP). All SWIMS users must receive complete training on the Case Management Standard Operating Procedures for Children in Need of Care and Protection together with how to use SWIMS as a foundation. This is followed by a period of practice and assessment on **SWIMS Demo** (<https://demo-swims-mogcsp.primero.org/v2/login>).

SWIMS Demo is best described as a replica of the operational SWIMS system (a.k.a. SWIMS Production). SWIMS Demo is used for demonstration, testing and training purposes by new users and stakeholders. It allows individuals to explore the full functionality of SWIMS, without affecting users and live data of SWIMS Production. All data on SWIMS Demo is dummy data and does not reflect real cases. Access to SWIMS Demo requires login credentials generated by the National System Administrator.

Once deemed ready, new users will be granted login credentials for **SWIMS Production** (<https://swims.mogcsp.gov.gh>) by SWIMS National System Administrators. SWIMS Production refers to the live, operational system where approved users enter real cases and conduct case management. Once trained, users should use only SWIMS Production to enter real cases.

As a new user, your access to SWIMS features and functionality varies based on the type of work you perform, your location and level (e.g., national, regional or MMDA), and the agency with which you work. Together, these factors will determine your “User Role” viz. the set of systems permissions to be granted to you as a SWIMS user. As of October 2025, SWIMS contains 13 user roles with the following key permissions:

User Role	Admin Level	Is Manager?	Which cases can this user access?	Case record access	RHC Registry access
DSWCD Case Worker	MMDA	-	My cases	Create, edit	View
DSWCD Case Manager		✓	My Group’s cases	Create, edit	View
DSWCD Institution Case Worker		-	My cases	Create, edit	View
DSWCD Institution Case Manager		✓	My Group’s cases	Create, edit	View
DSWCD Institution Service Provider		-	My cases	View, edit	View
DSWCD Institution Supervisor		✓	My Group’s cases	Create, edit	View

User Role	Admin Level	Is Manager?	Which cases can this user access?	Case record access	RHC Registry access
NPO Service Provider	MMDA	-	My cases	Create, edit	View
NPO Supervisor		✓	My Group's cases	Create, edit	View
Regional Case Manager	Region	✓	My Group's cases	View	View
National Protection Officer (Statistics only)	National	-	No case access. Only statistics.	-	View
RHC Registry Manager		✓	No case access. Only statistics.	-	Create, edit
National Case Manager		✓	All cases	View	View
National System Administrator	National	-	No case access. Only statistics.	-	View

Existing roles and permissions in SWIMS are subject to change and new roles may be created by the SWIMS Technical Team as and when necessary. A detailed list of SWIMS user roles and permissions as of December 2025 can be found in **Annex A**.

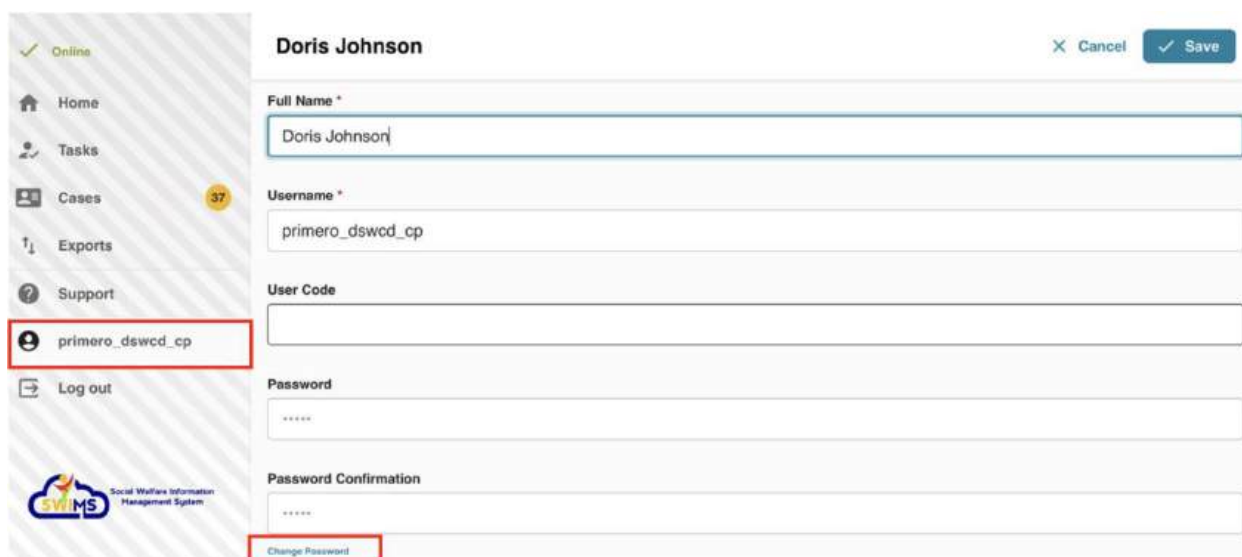
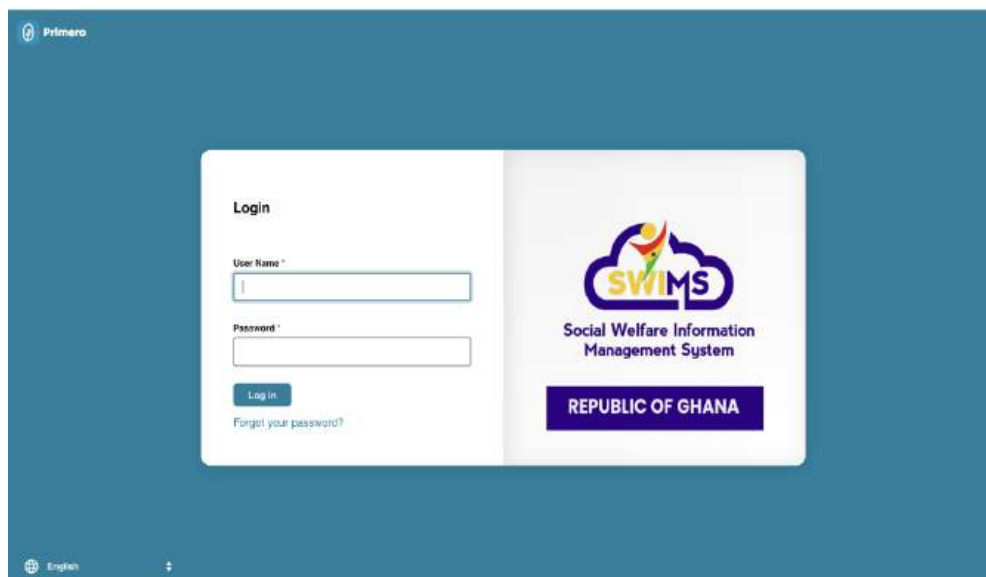
Logging In

SWIMS Production is available on the following URL: <https://swims.mogcsp.gov.gh>

When logging into SWIMS, you will see Username and Password fields. In the Username field, type in the unique username provided to you by the National System Administrator. Enter your password in the field below and click **LOG IN**. If you have forgotten your password, click on **Forgot your password?** to receive a password reset link on your registered email address. Alternatively, contact your National System Administrator to receive a temporary password.

My Account and Password Change

Upon first logging into SWIMS, all users must immediately use the My Account page to change their temporary password and verify and/or update their individual profile details.



My Account and Email Notifications

Using the **My Account** page, all users are required to provide a functional email address and check the **Receive email notifications?** box as shown below to ensure they receive essential case updates from SWIMS. Users may receive notification emails that either welcome them to the application, or alert them to changes to their cases. The following users can receive emails in the following circumstances:

- Managers and Supervisors - when case workers request approval for case plans, closures, etc.
- Case workers and service providers – when managers/supervisors respond to approval requests for case plans, closures, etc.
- Users who have received a case transfer, assignment or referral
- Users who have received a case transfer request

✓ Online

Home

Tasks


Cases 37

Exports

Support

primero_dswcd_cp

Log out



English

Doris Johnson

Email *

primero_dswcd_cp@primero.com

Position

Location *

GHANA::GREATER ACCRA REGION::ACCRA METROPOLITAN ASSEMBLY

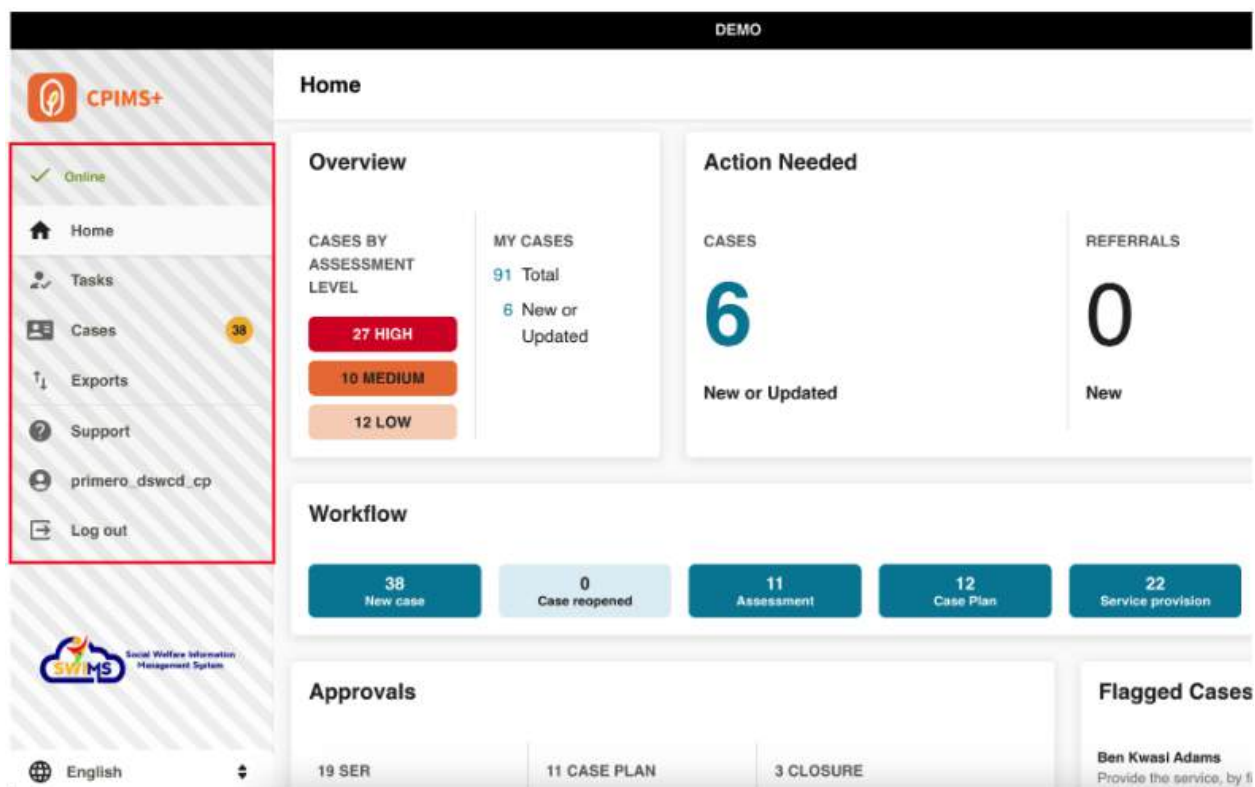
Receive email notifications?

- Approval Request (Managers)
- Approval Response (Case Workers)
- Assignments, Transfers, and Referrals
- Transfer Requests

NAVIGATING SWIMS

Navigation Menu

The Navigation Menu appears at the left side of your screen where you can quickly navigate to the different pages which are available to you on SWIMS. The type of information that appears in your Navigation Menu will depend on the type of work you do for your organization or your “User Role”. In the example below, the user has access to six different pages – Home, Tasks, Cases, Exports, Support and My Account. On larger devices such as a computer, the Navigation Menu will always be visible to the left of your screen, irrespective of what page you are on.



On smaller devices, such as tablets or phones, you will need to click or tap on the menu button appearing at the top left of your screen to show the Navigation Menu.

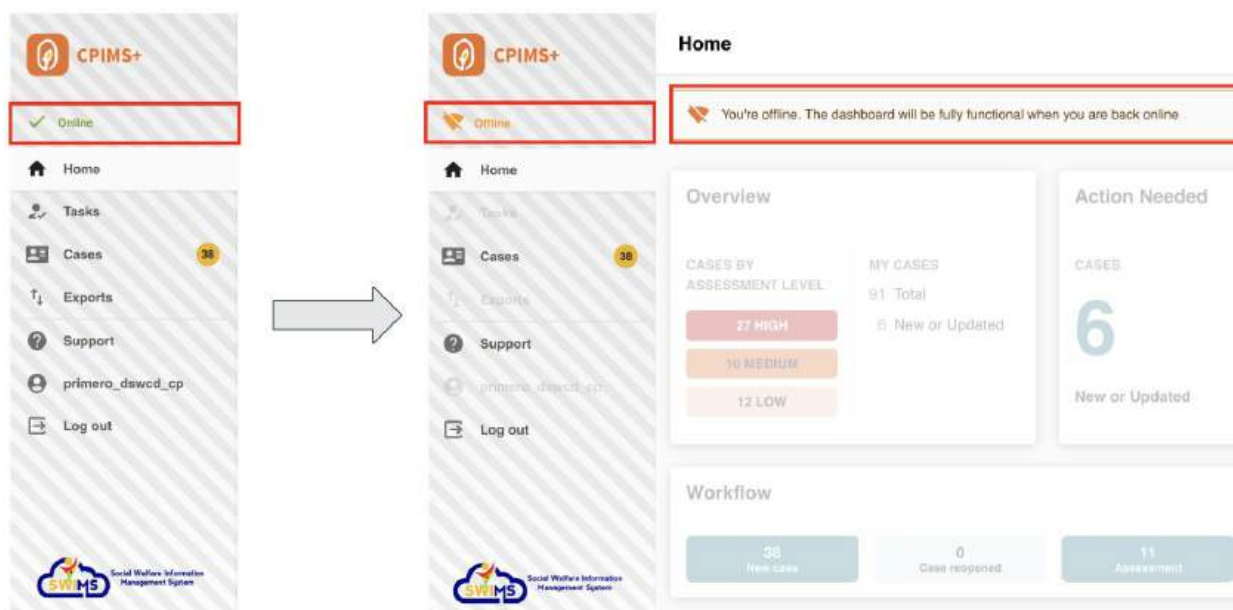
Online/Offline Mode

SWIMS is designed to function both online and offline to accommodate situations where users experience limited, interrupted or no internet connectivity. At the top of the Navigation Menu, an icon indicates whether you are working in online or offline mode, based on your internet connectivity. The figures below provide examples of both the Online and Offline icons that users will see.

Online Mode: When you have internet connection, you will see the “Online Mode” symbol at the top of the Navigation Menu. This means that Primero has full functionality.

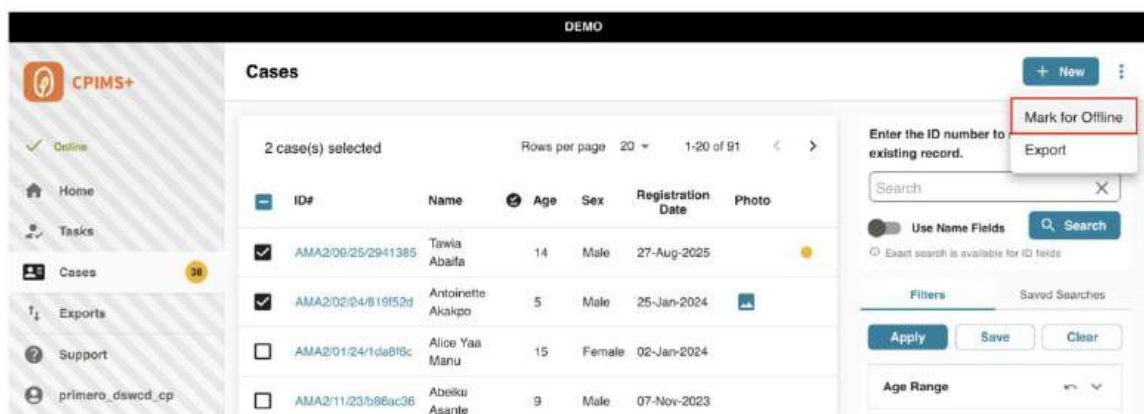


Offline Mode: If you lose your internet connection or choose to work offline, you will be in “Offline Mode,” as indicated in the images below.

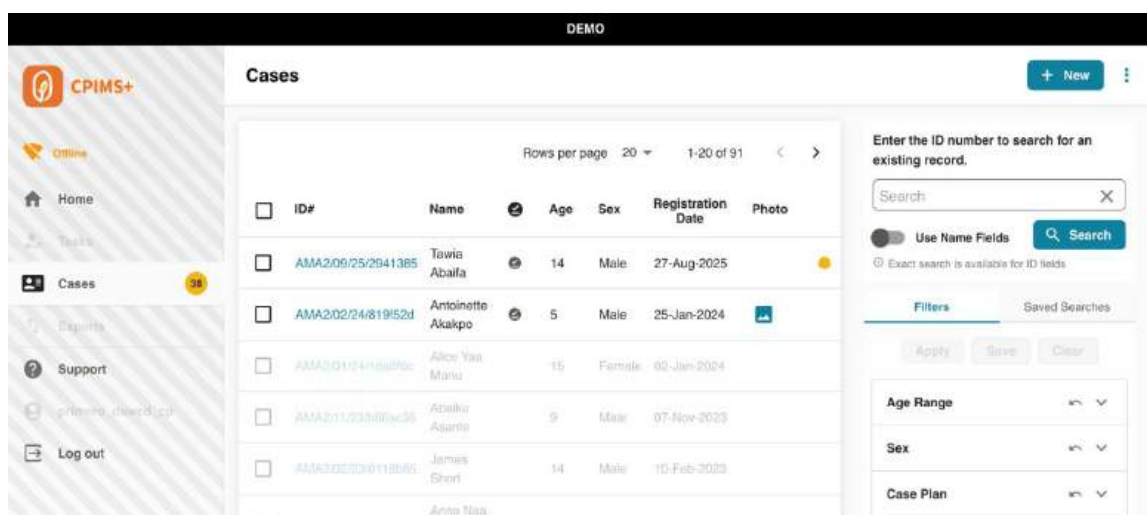


It must be noted that an internet connection is required to experience the full functionality of SWIMS. When you are in Offline Mode, you will have limited functionality, as follows:

- **Login:** You can login to SWIMS only when online. In order to use SWIMS offline, you must remain logged in even after losing internet connectivity.
- **Create cases:** You will be able to create and save new cases, but your changes will not be submitted until you are back online.
- **View/edit cases:** You can use the **Mark for offline** function to access and edit records offline on the device you are using. You can do this by selecting the cases you would like to work on while offline and select “Mark for offline” in the **Actions menu** on the top-right corner. Once you have marked cases for offline editing, they will be available while offline.



For example, in the image below, the cases you were working on before you lost connectivity (i.e., Tawia Abaifa and Antoinette Akakpo) are still accessible from the Case List. All the other cases are greyed out and inaccessible until you are back in Online Mode. This means that if you are planning to go into Offline Mode, you should “Mark for Offline” any cases you will want to edit or access.



- Only certain actions will be available in Offline Mode (such as requesting approvals or deleting uploads). Note that these actions will only get submitted to the system once you are back online. Some pages, such as Tasks and Exports, are unavailable in Offline Mode.

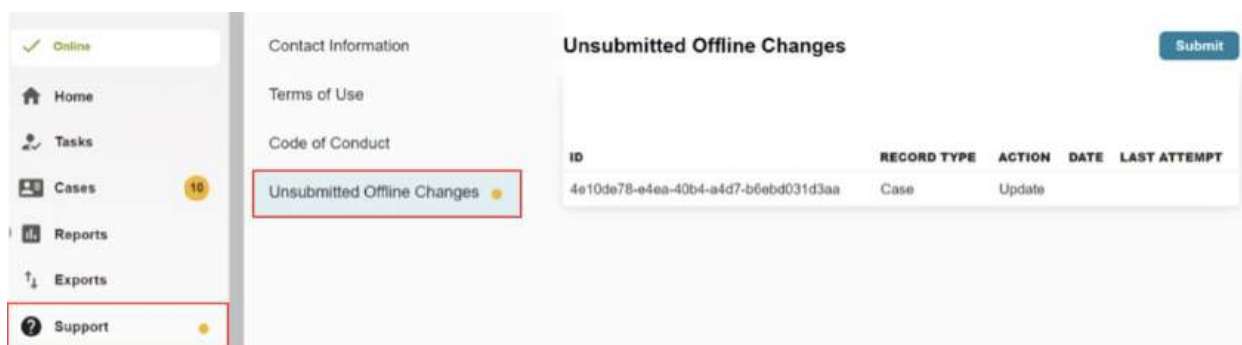
IMPORTANT: Note that if you choose to log out while in Offline Mode, you will not be able to log back in until you are online again. Additionally, if you log out, any changes you made while offline will be lost. In other words, any changes made in the offline mode will only be saved when you are back online. Thus, **do not LOG OUT** until you are back online.

NOTE: If you are using a VPN, or if your organization has provisioned your device with advanced security settings, you may not be able to use Offline Mode. Before attempting to use Primero in a low-connectivity setting, try using Primero at home or in your office, and switch on your device's “Airplane Mode”. If you do not see the "Offline" notification appear in Primero, then Offline Mode may not work on your device.

This means information you enter while you are offline will not be saved. If you are unable to use Offline Mode, please talk to your organization's ICT team about how to update your device's settings.

Unsubmitted Offline Changes

In the support page, there is a tab called "Unsubmitted Offline Changes" as shown below:



When users are offline, and if they go online and any cases fail to sync in the backend of the system, users can try to re-submit any of the unsynced records here by clicking "**Submit**". When the user clicks on submit, SWIMS attempts to submit the changes again. This is useful for those users who have intermittent internet access.

Home - Dashboards

The Dashboard or **HOME** page is where you will land upon logging into SWIMS. On this page, you can quickly find an overview of all the case records and/or related information that is accessible to you through SWIMS. The type of information that appears on your dashboard will depend on the type of work you do for your organization or in other words, your User Role. For instance, Caseworkers, Case Managers, and National System Administrators will each see different dashboards which are tailored to the needs of their day-to-day work. A few notes about dashboards:

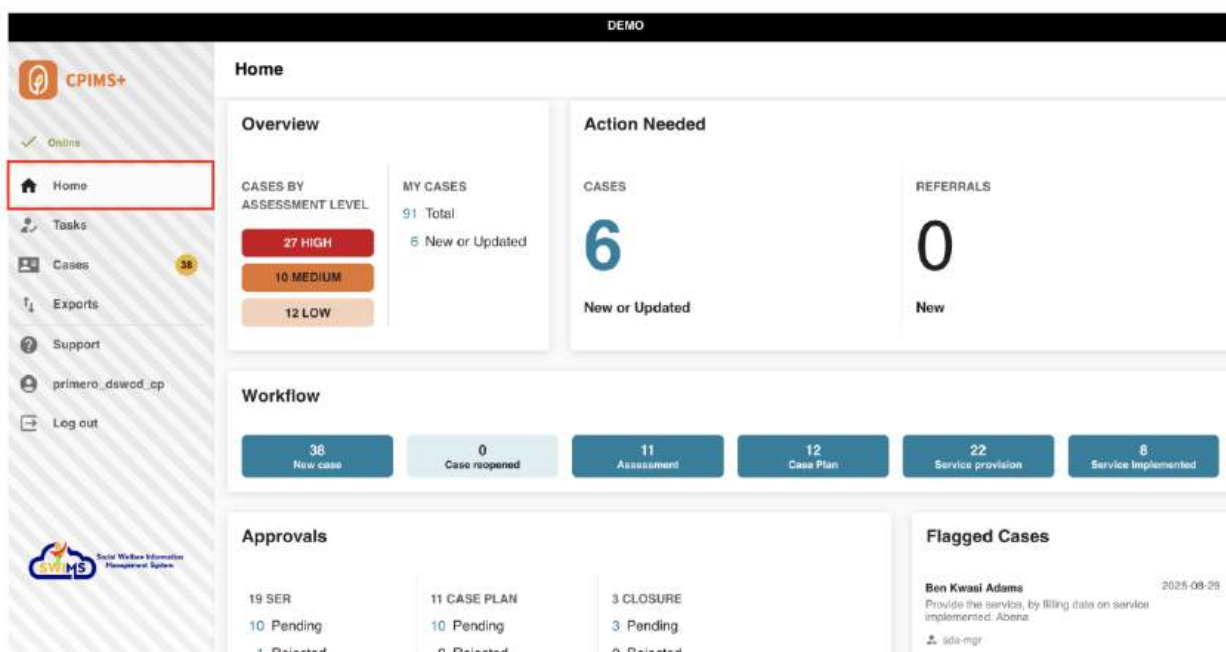
- You can always get back to the dashboard by clicking on the **HOME** button in the Navigation Menu.
- Clicking on any number on your dashboard will take you to the list of the records which that number represents.
- In general, numbers on the dashboard represent case records and/or related information to which you have access. For example:
 - If you are a DSWCD caseworker, you have access to only your own cases. Therefore, the numbers on your dashboard will reflect only those cases which you manage directly, or which have been referred to you. The figure above is an example of the number you will see on your dashboard as a DSWCD case worker.
 - If you are a DSWCD case manager and have access to all the cases managed by users in your team (also known as your “user group”). The numbers on your dashboard will reflect only these cases.
 - If you are a DSW Regional Case Manager, your dashboard will reflect all case records in the system for your region only.

- Remember that dashboard numbers tend to represent open case records only (unless the dashboard number explicitly mentions closed records).
- Dashboard numbers also exclude disabled⁴ records.

The next section provides a brief overview of individual components of dashboards that different User Roles will see when they first log in to SWIMS.

Caseworker Dashboards

The figure below shows the dashboard you will see in most Case Worker roles (e.g., DSWCD caseworker) when you first login to SWIMS.



- **Cases by Assessment Level** show how many of your cases are at each "Risk Level"⁵. If a case has not been assigned a risk level, then it will not appear in this section.
- **My Cases** includes two indicators:
 - "Total" - this is the total number of cases owned by you.
 - "New and Updated" – this refers to cases which (1) a supervisor has just assigned it to you; or (2) another user in the system has added information to the case since the last time you saw it. This number will decrease if you view the case, make a change and save the case.

⁴ Disabling a case is equivalent to deleting a case in the sense that it will no longer be visible for the case worker but will remain in SWIMS for recording purposes.

⁵ To know how to assess the risk level of different protection concerns, please refer to the Inter-Sectoral SOP for child protection and family welfare: <https://www.unicef.org/ghana/reports/inter-sectoral-standard-operating-procedures-child-protection-and-family-welfare>

- **Action Needed** includes two indicators:
 - "New and Updated" is the same as the indicator mentioned above.
 - "Referrals" shows the number of cases that have been referred to you.
- **Workflow** tells you how many of your cases are at each stage of the case management workflow: New, Assessment, Case Plan, Service Provision, Service Implemented and Closed. Read more about the workflow stages in the *Workflow Status Bar* section below.
- **Approvals** tells you how many of your approval requests are pending, or have been approved, or rejected by your case manager. As can be seen in the figure below, each type of approval appears with its own column.
- **Flagged Cases** - This displays cases that you have flagged as a case worker (or case manager). We will review "Flags" in a later section.
- **Referrals** includes two indicators:
 - "Shared with Me" shows the total number of cases that have been referred to you, including the number of new cases that have been referred to you.
 - "Shared with Others" shows the total number of your cases which have been referred by you to another SWIMS user.

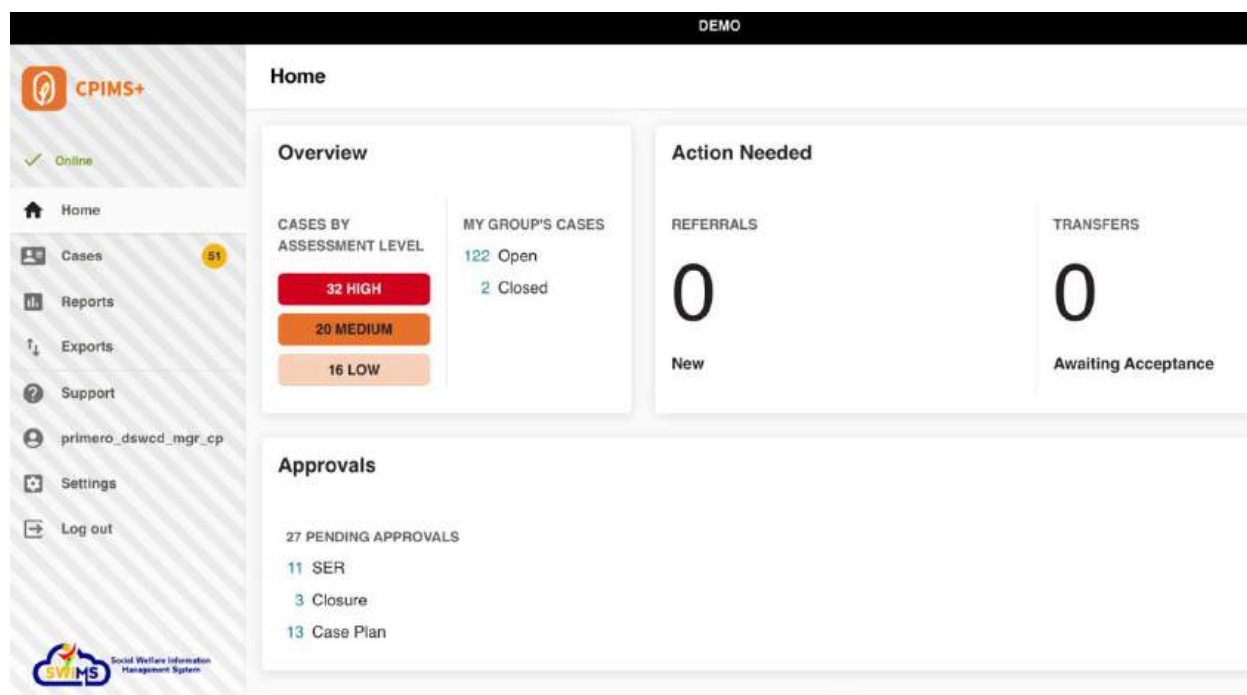
We will review referrals in a later section.

- **Transfers** include cases whose ownership has been transferred to another user by you. This shows transfers of your cases that are pending acceptance by other users, and transfers that have been rejected by other users. We will review transfers in a later section.

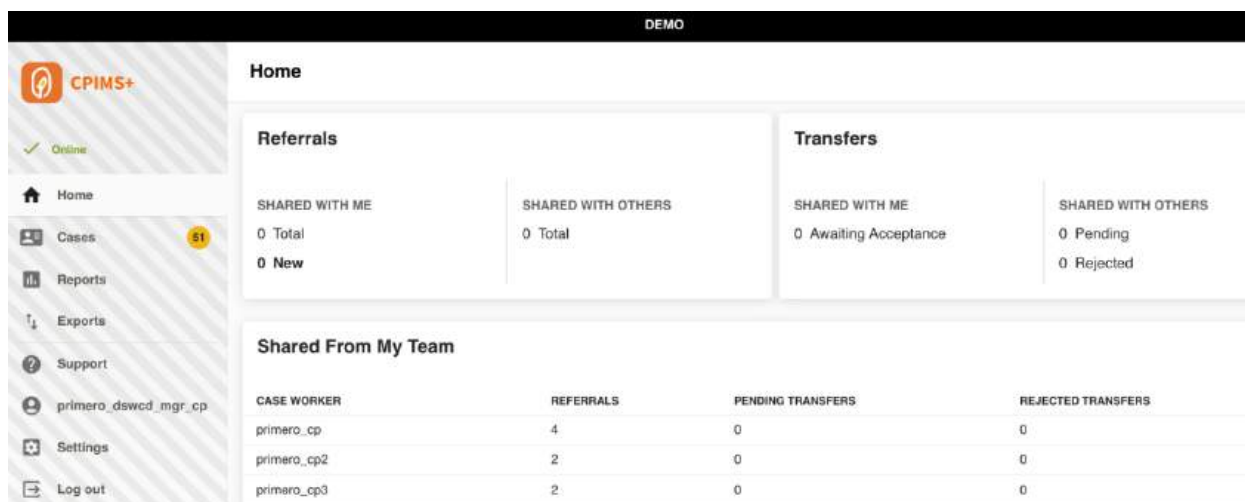
Case Manager Dashboards

The figure below shows the dashboard you will see as a Manager when you first login to SWIMS. Please note that as a National Case Manager, your dashboard will contain the same elements, except the numbers will pertain to cases managed by all SWIMS users in Ghana. Similarly, as a Regional Case Manager, your dashboard will contain cases managed by all SWIMS users in your region, and cases in your MMDA as a DSWCD Case Manager.

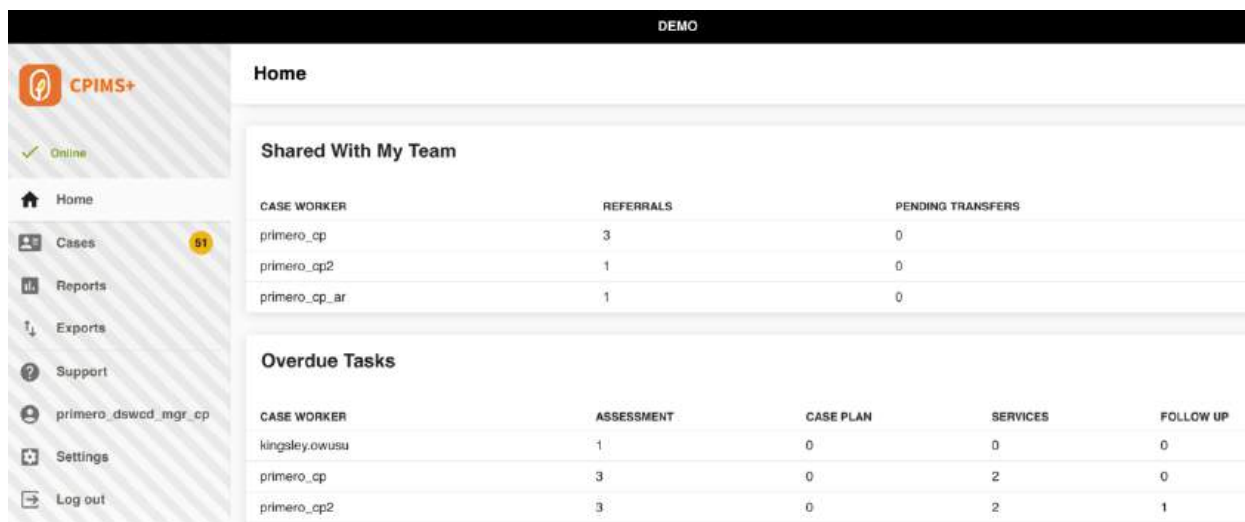
- **Cases by Assessment Level** shows how many cases managed by your team (also known as "User Group") are at each "Risk Level".
- **My Group's Cases** shows the total number of open and closed cases managed by all caseworkers in your team.
- **Action Needed** includes two indicators:
 - "New and Updated" is the same as the indicator mentioned above.
 - "Referrals" shows the number of cases referred to your group.



- **Approvals** show how many approval requests from your team are pending for different case forms.
- **Referrals** includes two indicators:
 - “Shared with Me” shows the total number of cases that have been referred to your team, including the number of new cases that have been referred.
 - “Shared with Others” shows the total number of your cases which have been referred by your team to another SWIMS user.
- **Transfers** include cases whose ownership has been transferred to another user by your team. This shows transfers of your team’s cases that are pending acceptance by other users, and transfers that have been rejected by other users.
- **Shared from My Team** shows how many of the cases managed by caseworkers in your team have been transferred or referred to other users.



- **Shared with My Team** is similar to the "Shared with Me" section, except that it shows how many of the cases other users have referred or transferred to caseworkers in your team.
- **Overdue Tasks** shows how many cases managed by your team have upcoming or overdue tasks. As can be seen in the figure above, this information is available for each caseworker and categorized by four types of tasks - Assessment, Case Plan, Services, and Follow Up.



- **Workflow - Team Cases** shows how many cases are at each stage of the case management workflow for each caseworker in your team.
- **Protection Concerns** shows the number of cases with each type of protection concern, broken down by:
 - "All Cases" - This includes both open and closed cases.
 - "Open Cases" - This includes only cases which are still open.
 - "New (This Week)" - Open cases registered 0-7 days ago.
 - "Closed (This Week)" - Cases which were closed 0-7 days ago.

Workflow - Teams cases

	NEW CASE	CASE REOPENED	ASSESSMENT	CASE PLAN	SERVICE PROVISION	SERVICE IMPLEMENTED	CASE CLOSED
primero_cp3	1	0	0	1	0	0	0
primero_cp_ar	0	0	0	0	0	0	0
primero_dswcd_cp	37	0	11	11	24	8	2
primero_dswcd_mgr_cp	1	0	0	0	1	0	0
primero_mgr_national	0	0	0	0	1	0	0
social_worker1	0	1	0	1	0	1	0
social_worker2	1	0	0	0	0	0	0

Protection Concerns

PROTECTION CONCERNS	ALL CASES	OPEN CASES	NEW (THIS WEEK)	CLOSED (THIS WEEK)
street_child	2	2	0	0
Child Sexual Abuse	4	4	0	0
statelessness	1	1	0	0

National Protection Officer and National System Administrator Dashboard

The figure below shows the dashboard you will see as a National Protection Officer when you first login to SWIMS. Please note that as a National System Administrator, your dashboard will contain the same elements.

Cases

REGION	OPEN CASES	NEW (LAST WEEK)	NEW (THIS WEEK)	CLOSED (LAST WEEK)	CLOSED (THIS WEEK)
BONO EAST REGION	106	0	0	0	0
OTI REGION	42	9	0	0	0
WESTERN REGION	92	12	2	0	0
NORTHERN REGION	67	0	0	0	0
CENTRAL REGION	383	0	0	0	0
SAVANNAH REGION	20	0	0	0	0
GREATER ACCRA REGION	613	21	21	0	0

Protection Concerns

PROTECTION CONCERNS	ALL CASES	OPEN CASES	NEW (THIS WEEK)	CLOSED (THIS WEEK)
Persons with HIV/AIDS and other serious illnesses	4	4	0	0
street_child	2	2	0	0
Child Sexual Abuse	166	163	9	0
statelessness	1	1	0	0

- **Cases (by location)** shows the number of cases registered in each region of Ghana. For each region, the table also shows:
 - "Open Cases" - Total number of open cases registered in this location.
 - "New (Last Week)" - Cases registered in this location 7-14 days ago.
 - "New (This Week)" - Cases registered in this location 0-7 days ago.
 - "Closed (Last Week)" - Cases registered in this location which were closed 7-14 days ago.
 - "Closed (This Week)" - Cases registered in this location which were closed 0-7 days ago.

- **Protection Concerns** shows the number of cases registered with each type of protection concern in Ghana. Each protection concern is broken down by:
 - "All Cases" - This includes both open and closed cases.
 - "Open Cases" - This includes only cases which are still open.
 - "New (This Week)" - Open cases registered 0-7 days ago.
 - "Closed (This Week)" - Cases which were closed 0-7 days ago.

Tasks

This page is typically available to Case Worker roles. Click on "Tasks" in the Navigation Menu to arrive at the **TASKS** page. Here, you will see pending Tasks for all cases managed by you. This includes upcoming and overdue tasks. For each Task, the list shows:

- Case ID
- Name of the Case
- Priority Level (also called "Risk Level")
- Type of Action
- Due Date
- Status (either "Overdue" or "Almost due")

ID#	Name	Priority Level	Type of Action	Due Date	Status
AMA2/12/22/e1e00e0	Gloria Brian Brobbey	MEDIUM	Service - Shelter Service	05-Dec-2024	🚨
AMA2/04/24/73a5b74	Kweku Adom Asslifi	HIGH	Service - Other Service	16-Aug-2024	🚨
AMA2/11/23/b86ac36	Abeiku Asante	HIGH	Service - Foster Care	10-Apr-2024	🚨
AMA2/04/24/73a5b74	Kweku Adom Asslifi	HIGH	Service - Residential Care	09-Apr-2024	🚨
AMA2/02/24/9513cff	Antoinette Akakpo	HIGH	Service - Police/Other Service	22-Mar-2024	🚨

SWIMS automatically generates Tasks for four types of actions – **assessments, case plan, services and follow up** – based on information you fill out in the Case forms. Each type of Task action is linked to a date field in a specific case form. As soon as a user enters a date value into one of these fields, SWIMS generates a Task with that due date. To find out how the due date is set for a Task, hover over the due date for any Task on this page. In the example below, we can see that a Shelter Service is due for a client named Gloria Brian Brobbey, based on the date entered in the “Implementation Timeframe” field on the “Nested Services” form.

ID#	Name	Priority Level	Type of Action	Due Date	Status
AMA2/12/22/e1e00e0	Gloria Brian Brobbey	MEDIUM	Service - Shelter Service	05-Dec-2024	🚨
AMA2/04/24/73a5b74	Kweku Adom Asslifi	HIGH	Service - Other Service		🚨
AMA2/11/23/b86ac36	Abeiku Asante	HIGH	Service - Foster Care	10-Apr-2024	🚨
AMA2/04/24/73a5b74	Kweku Adom Asslifi	HIGH	Service - Residential Care	09-Apr-2024	🚨

Note: A tooltip is visible over the '05-Dec-2024' due date, stating: "Implementation Timeframe" field on "Nested Services" form.

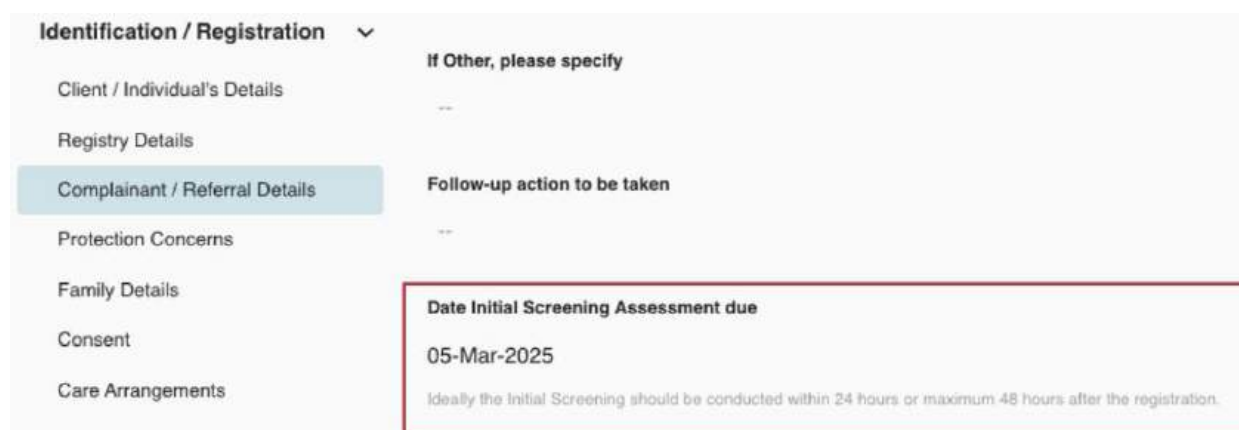
Each type of Task action also has a date field in the Case forms which can be used to mark the Task as "complete". Once a user enters a date value into this field, the Task is marked as "complete" and disappears from the Tasks list.

To complete a Task, click on that Task in the list. You will arrive at the case and form which corresponds to that Task. This form will contain the necessary field to complete this task. Click on **EDIT** and remember to look out for any **help text** i.e. assistive text in the case form to help you identify this field. Once you fill out this field, the Task will be completed and will disappear from the Tasks list.

Below is a list of the fields used for each type of Task action in the SWIMS configuration. Note that only record owners can see tasks for their cases. You will not see the tasks if you are supporting a case owned by another user (such as cases worked on through referral).

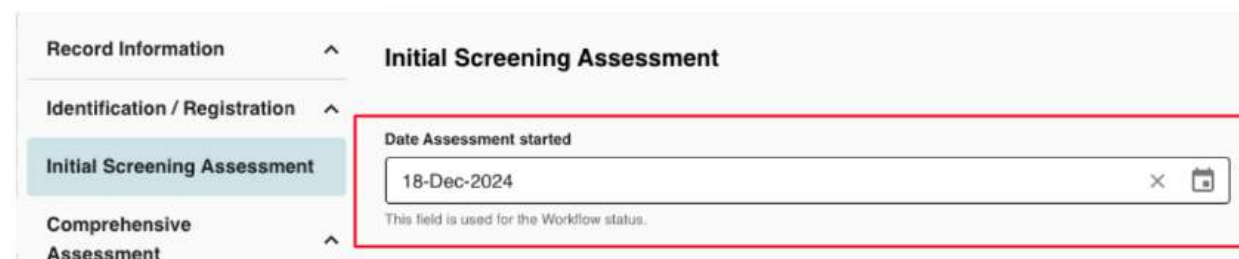
Assessment Task

- The due date for the Assessment task is set by the “Date Initial Screening Assessment Due” field on the Complainant / Referral Details form. Please note that ideally the Initial Screening should be conducted within 24 hours or maximum 48 hours after the registration.



The screenshot shows a sidebar menu on the left with the following items: Identification / Registration (expanded), Client / Individual's Details, Registry Details, Complainant / Referral Details (selected), Protection Concerns, Family Details, Consent, and Care Arrangements. The main content area is titled 'If Other, please specify' and contains a section 'Follow-up action to be taken'. A red box highlights the 'Date Initial Screening Assessment due' field with the value '05-Mar-2025'. Below this field, the help text reads: 'Ideally the Initial Screening should be conducted within 24 hours or maximum 48 hours after the registration.'

- To mark an Assessment as complete, use the “Date Assessment Started” field in the Initial Screening Assessment form. It is marked by the following help text – “This field is used for the Workflow status”.



The screenshot shows a sidebar menu on the left with the following items: Record Information, Identification / Registration, Initial Screening Assessment (selected), Comprehensive Assessment, and Assessment. The main content area is titled 'Initial Screening Assessment' and contains a field 'Date Assessment started' with the value '18-Dec-2024'. Below this field, the help text reads: 'This field is used for the Workflow status.'

Case Plan Task

- The due date for the Case Plan task is set by the “Date Case Plan Due” field on the Comprehensive Assessment form.

Record Information ^

Identification / Registration ^

Initial Screening Assessment

Comprehensive Assessment v

Comprehensive Assessment

Health and Physical Development

Comprehensive Assessment

Date Comprehensive Assessment Started
10-Jul-2025
dd-mmm-yyyy

Date Case Plan Due
23-Jul-2025
dd-mmm-yyyy

- To mark a Case Plan as complete, use the “Date Case Plan Initiated” field in the Case Plan form. It is marked by the following help text – “This field is used for the Workflow Status”.

Comprehensive Assessment ^

Case Plan Developed and Participants Involved

Social Enquiry Report

Case Plan

Reunification Details ^

Date Case Plan Initiated
--
This field is used for the Workflow status

Services Task

- The due date for Service tasks is set by the “Service Due Date” field that is available on the respective Services sub-form (we will review the different services sub-forms in a later section). This field is marked by the following help text – “Enter the Service Due Date; this is used in the dashboard and Tasks page to indicate if services are overdue”. Note that each Service sub-form entry will generate its own Task.

Case ID: AMA2/02/24/8

✓ New case ✓ Assessment

SERVICES x

Type of Service
Health/Medical Service

Created on
09-Jul-2025 21:48
dd-mmm-yyyy hh:mm

Service Due Date
11-Jul-2025

Enter the Service Due Date; this is used in the dashboard and Tasks page to indicate if services are overdue.

- To mark a Service task as complete, use the “Service Implemented On” field. This can be found in the same Services sub-form.

The screenshot shows a sidebar menu on the left with options: Services / Follow Up, Activities, Services, Follow Up, Case Conference Details, and Closure. The main content area has a 'Notes' field with the text 'Referral for urgent medical attention - FGM case'. Below that is a 'Service implemented' dropdown menu set to 'Implemented'. The 'Service Implemented On' field is highlighted with a red border and contains the date and time '31-Jul-2025 20:00' with a calendar icon and the format 'dd-mmm-yyyy hh:mm' below it.

Follow Up Task

- The due date for Follow Up tasks is set by the "Follow up needed by" field that is available on the respective Follow Up sub-form (we will review the different Follow up sub-forms in a later section). Note that each Follow Up sub-form entry will generate its own Task.

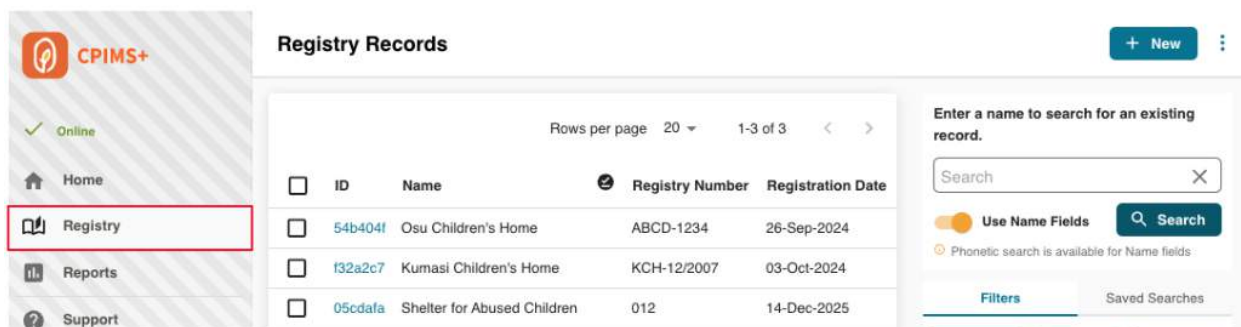
The screenshot shows a sidebar menu on the left with options: Reunification Details, Services / Follow Up, Activities, Services, and Follow Up. The main content area has a 'Type of service' dropdown set to 'Child Protection Service'. The 'Follow up needed by' field is highlighted with a red border and contains the date '22-Jul-2024' with the format 'dd-mmm-yyyy' below it. Below this is the 'Follow up date' field.

- To mark a Follow up task as complete, use the "Follow Up Date" field. This can be found on the same Follow Up sub-form.

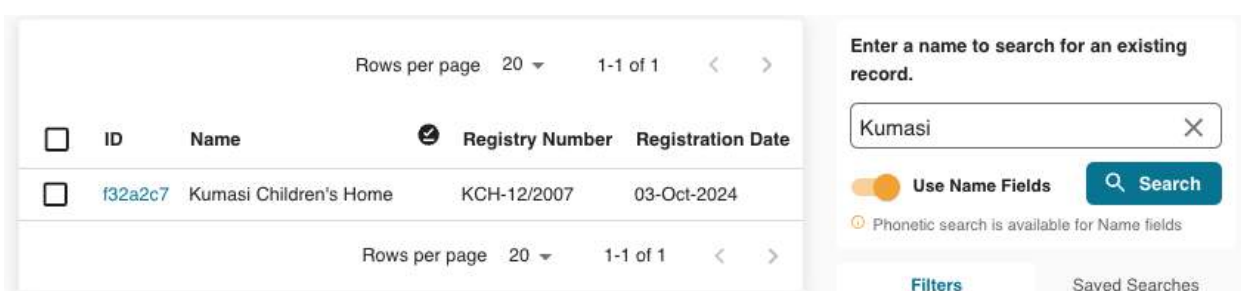
The screenshot shows a sidebar menu on the left with options: New case, As, Services / Follow Up, Activities, Services, and Follow Up. The main content area has a date field containing '22-Jul-2024' with the format 'dd-mmm-yyyy' below it. The 'Follow up date' field is highlighted with a red border and contains the date '31-Jul-2024' with the format 'dd-mmm-yyyy' below it.

Registry

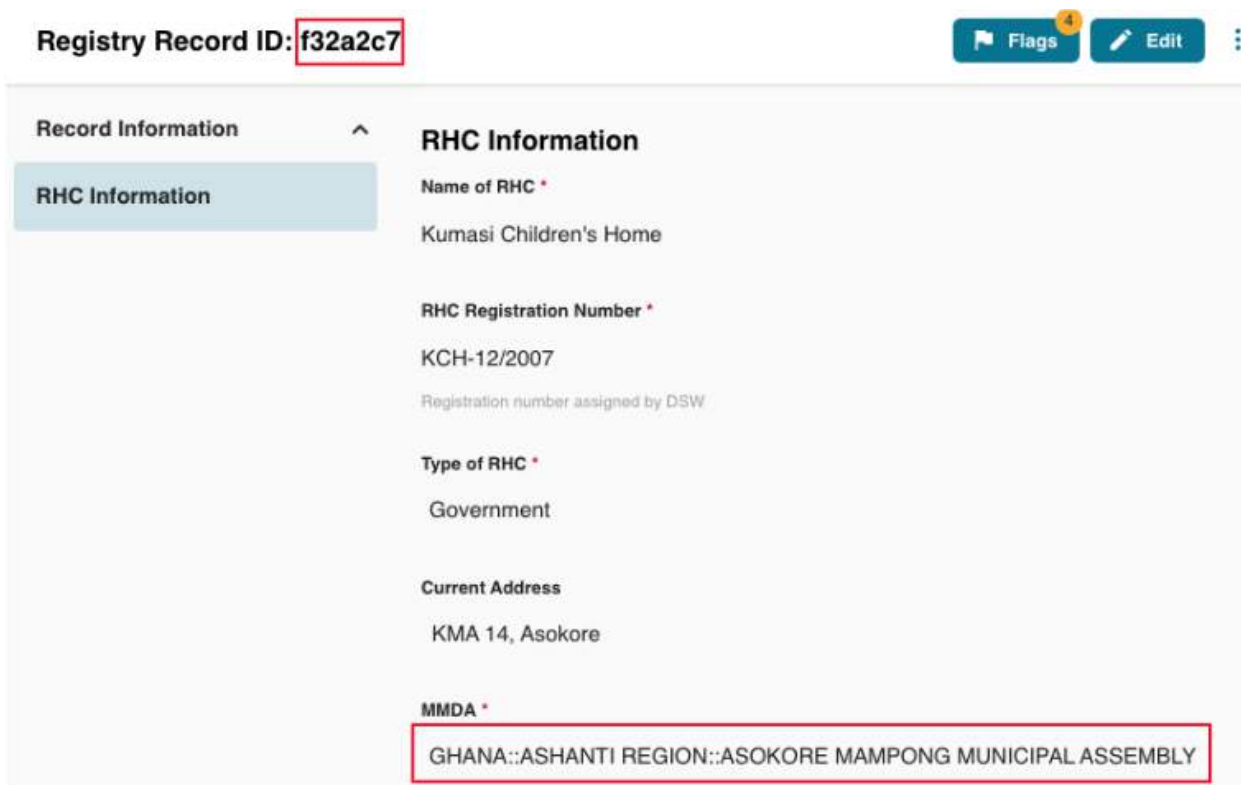
The registry feature is a type of complex lookup where users are able to search for a specific option which has multiple attributes linked to it. In the Navigation Menu, below the Tasks page, you may view the **Registry** record list. This feature was configured for Ghana in 2025 to maintain a list of all Residential Homes for Children (RHC) in Ghana.



The registry tool allows users to search for a specific RHC in the Registry, and view detailed information about the entity. Using the **Registry** page, the Government of Ghana can update and maintain a Registry i.e., a list of RHCs in Ghana.

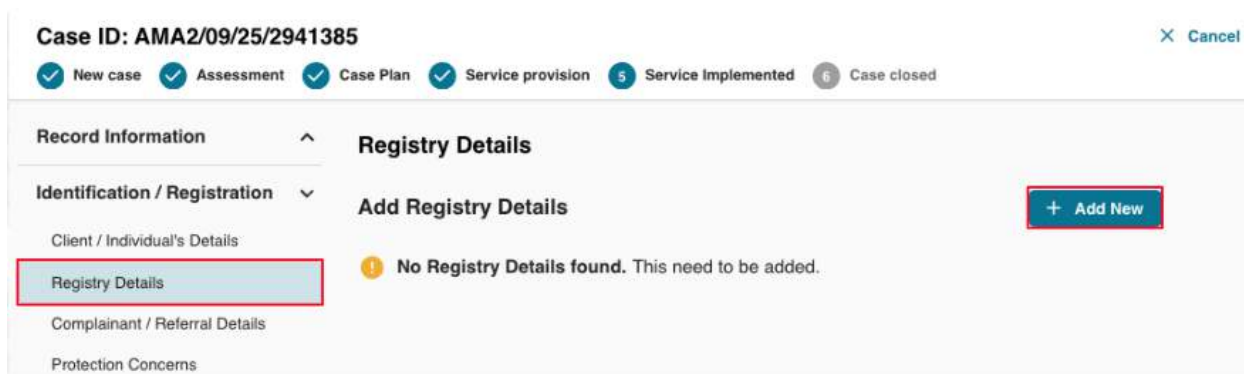


Each RHC has its own ID number. For example, “Kumasi Children’s Home” is in Asokore Mampong Municipal Assembly, Ashanti Region, Ghana and has an ID number f32a2c7⁶. Only RHC Registry Managers can add or update RHC records using the Registry forms.

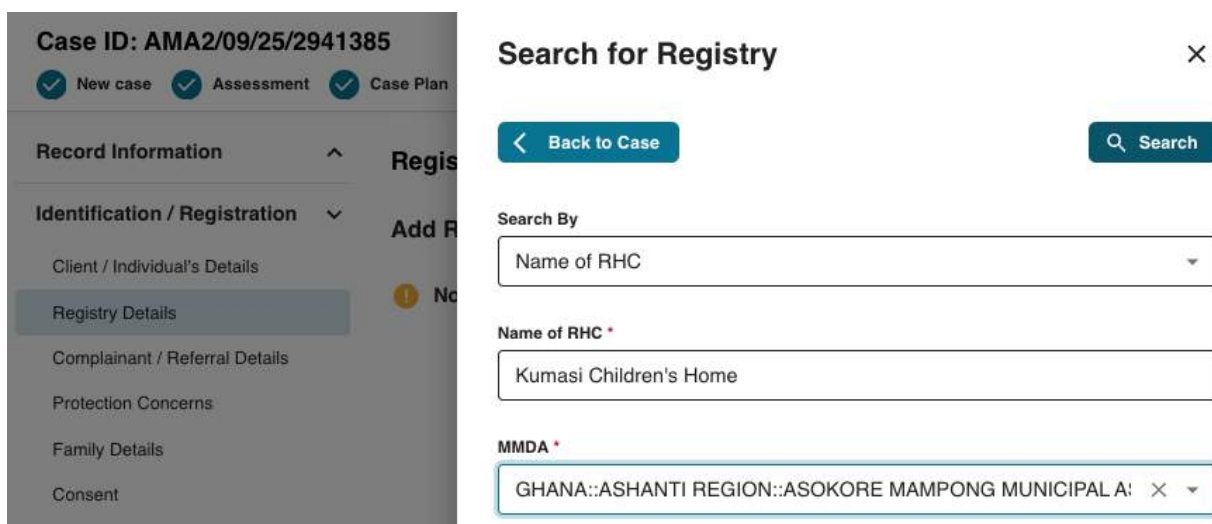


⁶ NB: All data and images shown in this manual are fictional, as entered in SWIMS Demo.

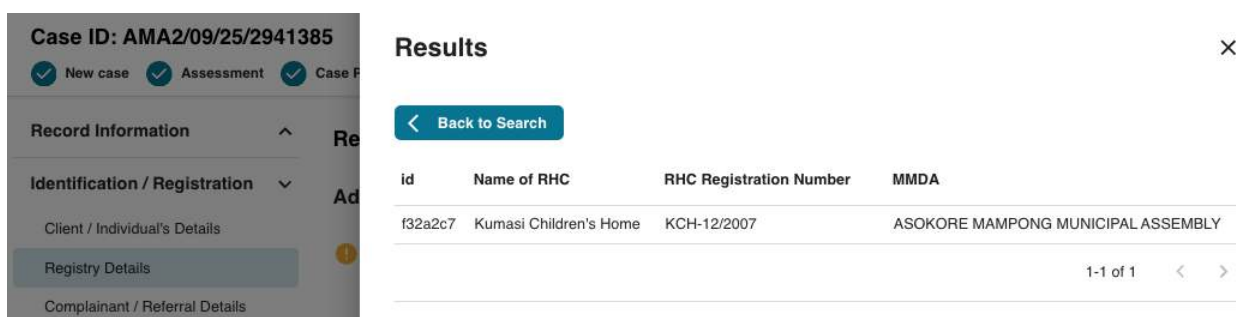
It also allows selected users to link registry records together with case records (refer to **Annex A** for more information on user permissions). In order to link an RHC record to a case record, you will find the Registry Details sub-form.



Select “Add New” and a slider will appear where you can search for the RHC you would like to add:



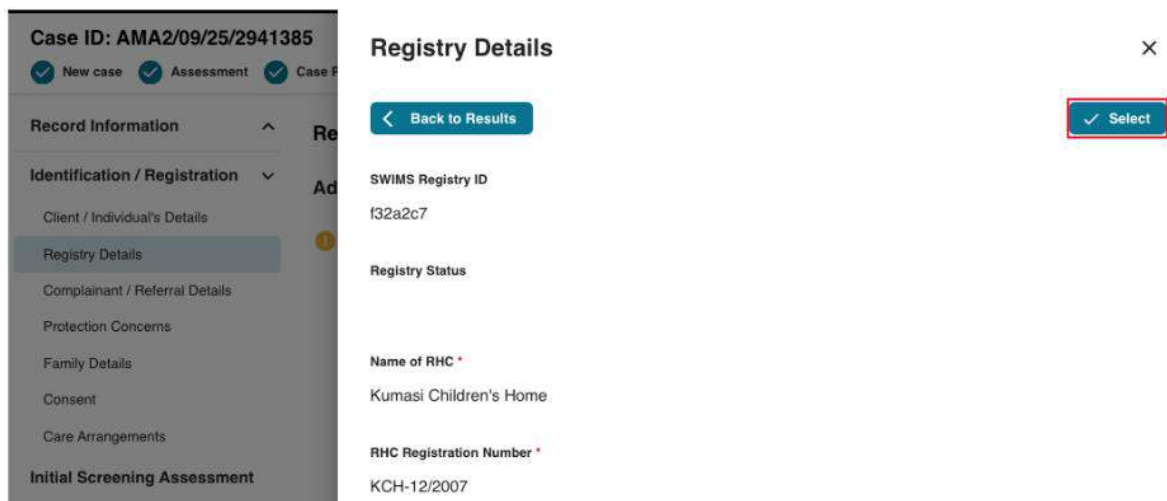
You will be prompted to select the variable you want to search by. You will then fill your search query. MMDA will also appear as a field and you can search by location. The search will return results linked to the names entered:



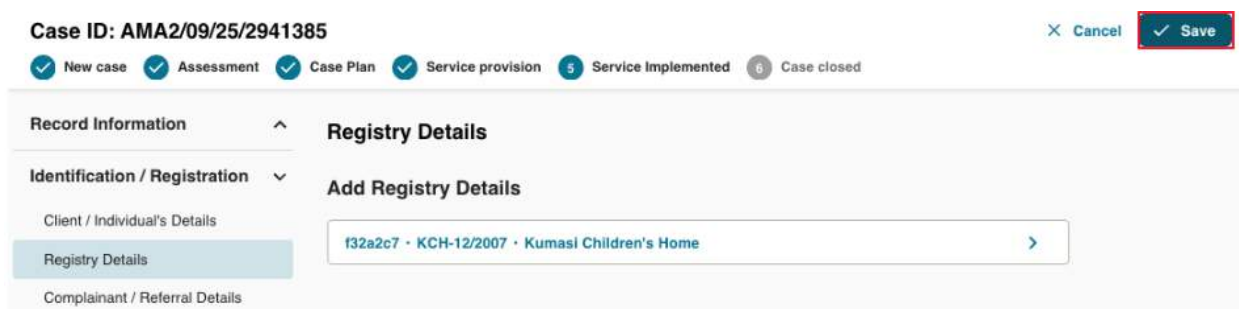
Unlike the search function on the Cases page, users must enter the exact name and location to find a matching RHC Registry record. For example, if searching by ‘Name of RHC’, users must enter ‘Kumasi Children’s Home’ and the correct MMDA for the RHC record to show. The user cannot enter ‘Kumasi’ or ‘Children’s Home’ or ‘Home’ in the Name of RHC field, or

enter 'GHANA::ASHANTI REGION' in the MMDA field. In other words, the Registry search functions do not use phonetic matching to generate the closest possible search results.

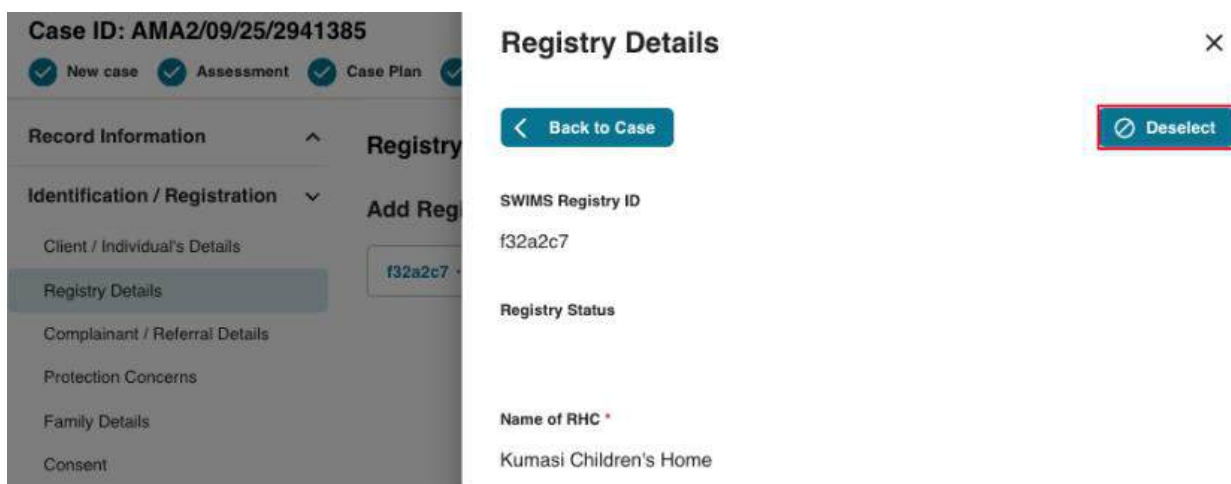
When you click search, you should see some results appear. Click the one you want. In this case, if the user selects “Kumasi Children’s Home” they will be able to see additional details about this RHC. Click “Select” if this is the option you would like to select.



Once selected, the case is now linked to this RHC.



If you want to deselect the provider and start over, click on the RHC record in the case form, then click the “Deselect” button.



The registry feature is configurable to store any amount of information. This feature can be useful for national registries, family case management, alternative care providers, non-SWIMS service providers and non-service provider organizations. As of December 2025, the Registry feature is not linked to reports or exports.

Cases

In the Navigation Menu, below the Tasks page, you may view the **Cases** record list⁷. This page contains a list of all cases owned by you as a caseworker or managed by your User Group as a case manager. This page is used to search for, view, edit or create new cases. Note that National System Administrators and National Protection Officers (Statistics Only) will not have access to the Case List. For more information on how record lists work, please see the Navigating Record Lists section.

Exports

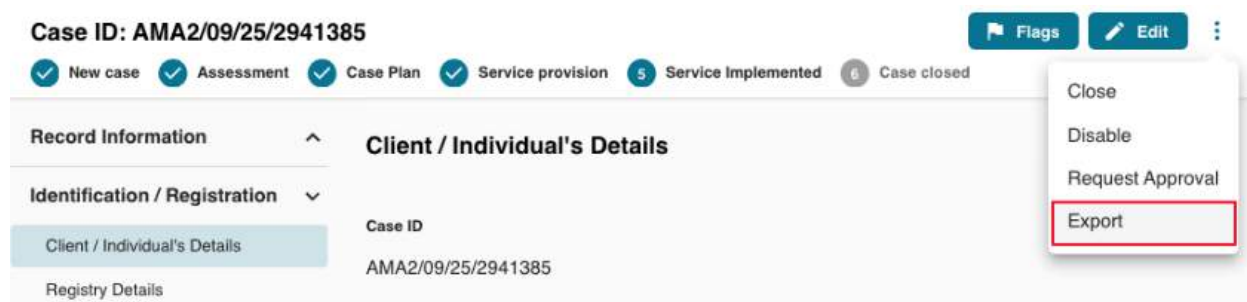
SWIMS allows users to export information about records in a number of formats. Users can export information from the View Record or Record List pages. In order to print information, you must use the export option which will download to your device. Only selected user roles have access to this feature (refer to **Annex A** for more information).

Format	Description	Fields Included
Excel	Exports to a standard .xls file. Each form gets its own tab in the file.	All fields to which the user's role has access.
CSV	Exports to a standard .csv file.	All fields to which the user's role has access.
PDF	PDF file which displays data as it appears in SWIMS. Not available from the Exports list view and does not support encryption.	Fields on all forms specified by the user, to which the user's role has access.
Custom	Excel file containing all the fields specified by the user.	All fields specified by the user, to which the user's role has access.

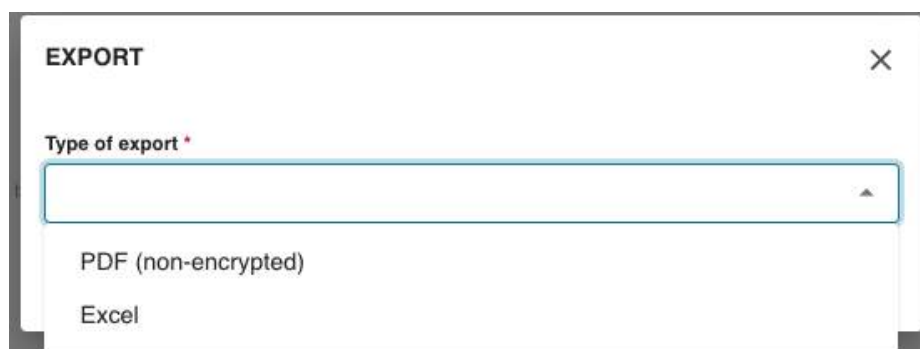
Excel Exports

To export data from a case record, first open the case record and then use the Actions menu on the top right corner to click **EXPORT**.

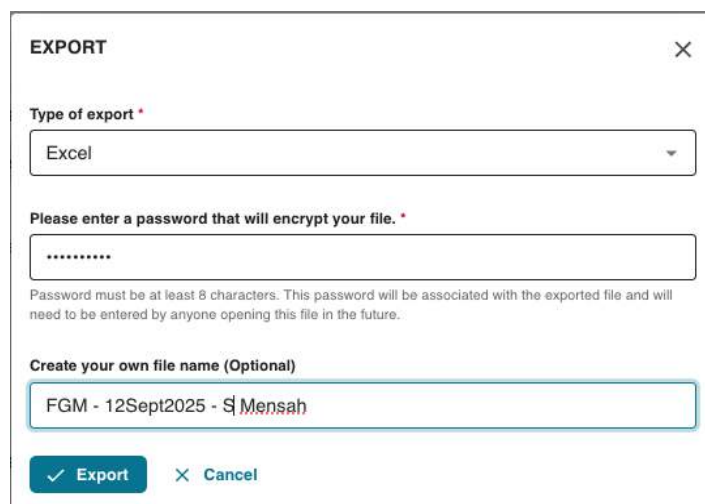
⁷ Primero offers four main types of records: **Cases**, **Incidents**, **Tracing Requests** and **Registry**. In the Navigation Menu, below the Tasks link are the links to the List pages for each type of record. These are the **Case List**, the **Incident List**, the **Tracing Request List** and the **Registry**. Depending on the work you do for your organization, you may only have access to one or two of these pages. For instance, in most Child Protection configurations such as SWIMS, caseworkers only deal with Cases, and so only have access to the Case List. For this reason, we usually use the Case List as an example when discussing record list functionality.



A modal will appear. You will see a dropdown labelled "Type of export." Click into this dropdown and select an export format.

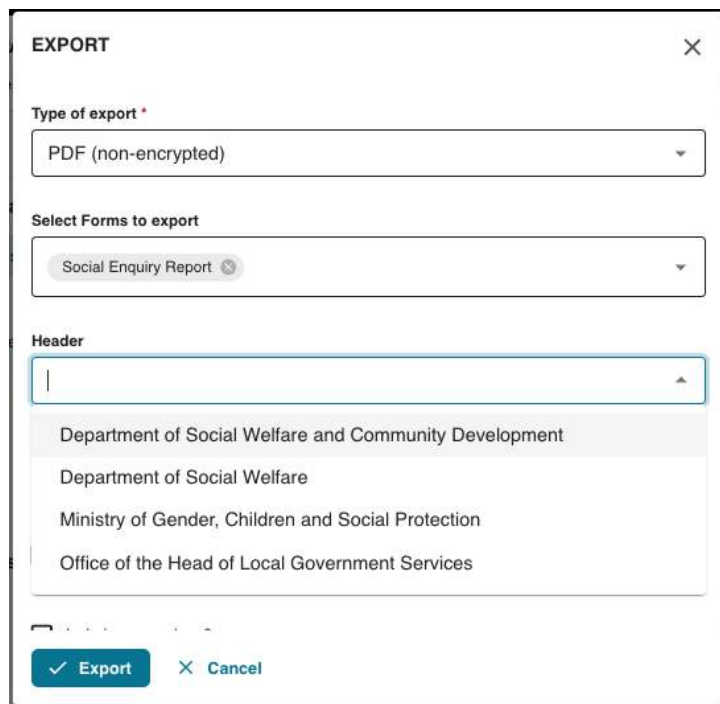


Depending on the format you choose, you may then be able to select forms and fields to export, specify a file name, and choose a password to encrypt your export file.



PDF Exports

If you choose a PDF export, you can also add in a header, logo or signature to appear on the PDF. Your National System Administrators can change the type of headers that you see and these headers will appear at the top of the PDF export:



For instance, if the **Department of Social Welfare and Community Development** is selected it will appear at the top of the PDF. You can create a title of the PDF which will appear under the header:

Case ID: 819f52d

Printed: 18-Dec-2025



Department of Social Welfare and Community Development
Accra Metropolitan Assembly

Social Enquiry Report

Approved by Manager	<input type="checkbox"/> Yes
---------------------	------------------------------

You can make a custom header, in this case ‘Accra Metropolitan Assembly’, by entering the text of the header you want to appear at the top of the PDF:



There two formats for the Custom export are:

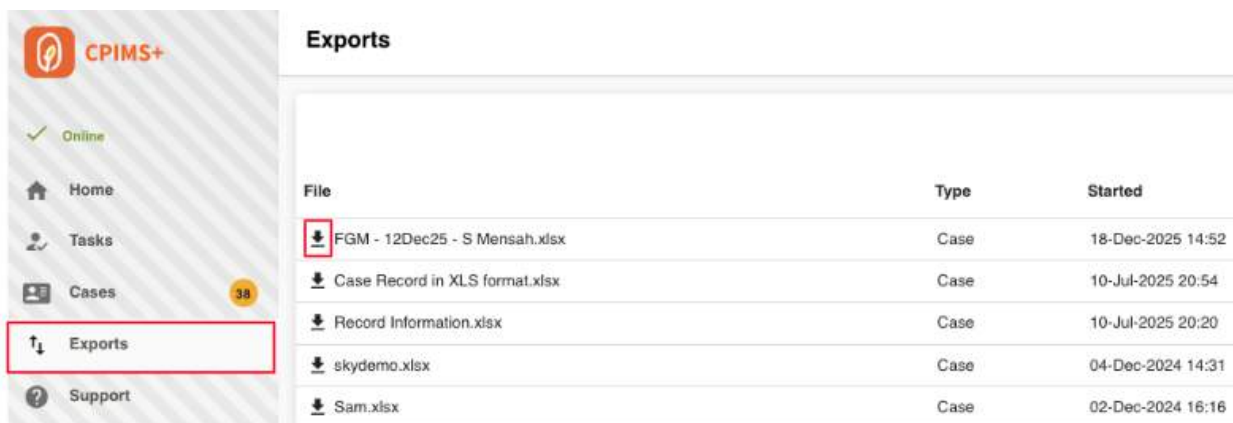
- Form - The user selects a list of forms or a list of fields to include in the export. Primero exports an Excel file with a tab for each form included in the export.
- Field - The user selects a list of fields to include in the export. Primero exports an Excel file with one tab, which includes all exported fields.

If you select "Form" as your format, a checkbox appears with the label "Would you like to choose individual fields for a form?"

- If you leave this unchecked, you will choose a list of forms you would like to include in the export file. All fields on these forms will be included.
- If you check this box, you will choose a list of individual fields to include in the export file. In the Excel file Primero exports, the fields you choose will be organized by form, so that each form gets its own tab.

Downloading Exports

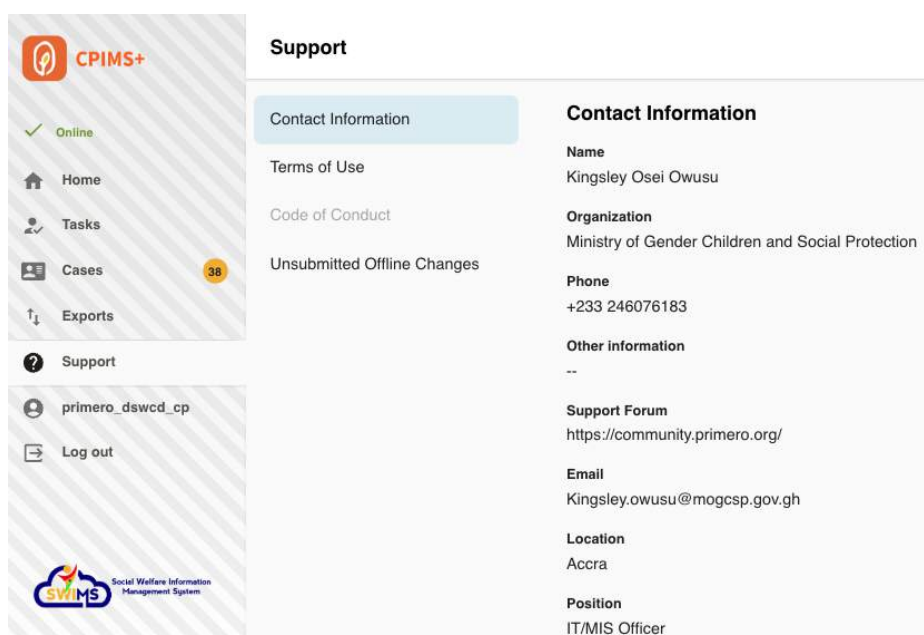
To create the export file, click **EXPORT**. To access an export file, click on the **Exports** page in the Navigation Menu. Here you will see a list of all of the exports you have created. When SWIMS is still loading an export, you will see a "loading circle" spinning next to it. If an export is ready to download, you will see a "download" icon next to it. Click on an export in the list to download the file.



NOTE: PDF exports do not appear on the Exports page. Instead, these download automatically once you submit your export.

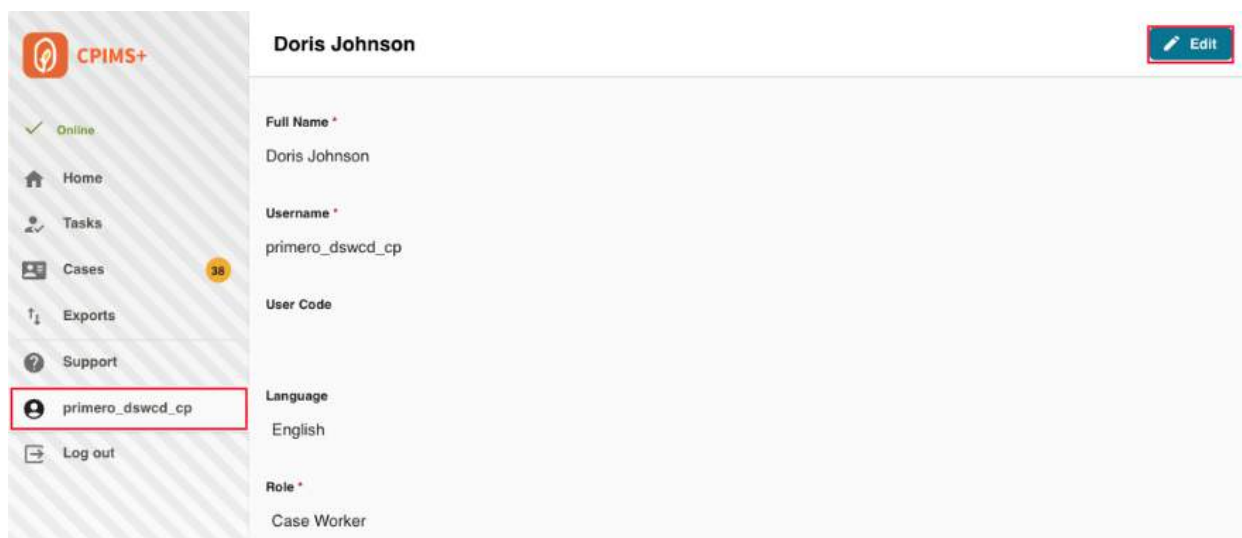
Support

In the Navigation Menu, below the Exports link, you should see the **Support** link. Clicking on this will bring you to a page with **Contact Information** for your system administrator.



My Account and Password Change

In the Navigation Menu, below the Support link, you will see a link with your username. This is the **My Account** page. Here, you can view and update details about your user account. Click the **EDIT** button at the top right of the page to update your user account or to change your password.



Use the **My Account** page to update the following:

- **Full Name:** This is the name that managers and administrators will see when they view your account, and cases that are owned/managed by you.
- **Password:** This must contain at least eight characters and include both letters and numbers.
 - To update your password, click **EDIT** followed by the "Change Password" link. This step is mandatory in order to update any temporary passwords provided by the National System Administrator.
 - If you forget your password, contact the National System Administrator to receive a temporary password. To view contact details of your National System Administrator, see the **Support** page.
- **Language:** English is the default language in which you will see SWIMS.
- **Phone:** This allows other SWIMS users, such as case managers or the National System Administrator with access to view your profile, to contact you.
- **Email:** This will be used for any email notifications pertaining to acceptance or rejection of case transfers. All users are required to have a functional email address and to enable email notifications in order to ensure they receive email notifications from SWIMS. If available, users are recommended to use their corporate email address.
- **Services:** This field contains a list of any services you will be providing through SWIMS. It will determine whether and when you appear as a potential recipient for case referrals and transfers.
- **Position:** This is your official title within your organization.
- **Current Location:** This refers to the location where you are officially based (e.g. the MMDA or region where you are working). It will determine whether and when you appear as a potential recipient for case referrals and transfers.
- **Receive email notifications:** All SWIMS users must select this option, to ensure email notifications are received from SWIMS, including the following:
 - Cases assigned, transferred, or referred to you.
 - Requests from other users for you to transfer one of your cases to them.
 - Manager approvals and requests for manager approval.

Doris Johnson ✕ Cancel **✓ Save**

Full Name *

Username *

Click the **SAVE** button once you are finished making changes.

Notification Emails

Users may receive notification emails that either welcome them to the application, or alert them to changes to their cases. The following users will receive emails in the following circumstances:

- Case Managers whose case workers have requested approval for case plans, closures, etc.
- Case workers whose case managers have responded to approval requests for case plans, closures, etc.
- Users who have received a case transfer
- Users who have received a case assignment
- Users who have received a case referral

Welcome emails will look something like the below message. If the new user clicks the "SWIMS" link in the message, they will be sent to the system login screen. Once again, users will only receive welcome emails if the system has been configured to send them, and if the user in question has been set up to receive them.



Settings

This page and all sub-pages within it are visible to selected users only, typically Manager-level roles (refer to Annex A for more information). This page contains information on existing SWIMS users, roles, user groups and agencies. Note that this page is only for informational purposes, and is a useful resource for caseworkers to search for SWIMS users for referral and transfer-related actions.

The screenshot shows the 'Users' management interface. On the left, a sidebar contains menu items: Users, Roles, User Groups, and Agencies. The main area displays a table of users with the following data:

<input type="checkbox"/>	Full Name	Username	Position	Agency
<input type="checkbox"/>	Jack Miszencin	jack.miszencin		DSWCD
<input type="checkbox"/>	Freda Faah	freda.faah		OHLGS
<input type="checkbox"/>	Pavel Nabutovsky	pavel.nabutovsky.test		UNICEF
<input type="checkbox"/>	DSW National Case Manager	primero_mgr_national		DSWCD
<input type="checkbox"/>	DSW Regional Case Manager	primero_mgr_regional		DSWCD
<input type="checkbox"/>	National Protection Officer (Statistics Only)	primero_mogcsp_npo		MoGCSP
<input type="checkbox"/>	DSWCD Manager	primero_dswcd_mgr_cp		DSWCD

On the right side, there is a search bar with the text 'Search by user's full name or username'. Below it are buttons for 'Search', 'Apply', and 'Clear'. There are also filter sections for 'Enabled / Disabled' (with 'Enabled' selected), 'Agency', 'User Group', and 'By Date'.

Audit Logs

To access this feature, click the Settings link in the Navigation Menu. Once you are in Settings, click "Audit Logs" in the Settings Navigation Menu. Only selected user roles have access to this feature (refer to **Annex A** for more information).

The screenshot shows the 'Audit Logs' page. The left sidebar has 'Settings' highlighted, with a red arrow pointing to the 'Audit Logs' sub-menu item. The main area displays a table of audit log entries with the following data:

Time	Performed By	Action	DESCRIPTION	Record Owner
18-Dec-2025 02:29	primero_mgr_national	Listing Records	Listing Records User	primero_mgr_national
18-Dec-2025 02:29	primero_mgr_national	Listing Records	Listing Records Dashboard	primero_mgr_national
18-Dec-2025 02:29	primero_mgr_national	Listing Records	Listing Records Dashboard	primero_mgr_national
18-Dec-2025 02:29	primero_mgr_national	List	List User group	primero_mgr_national

On the right side, there is a filter menu with buttons for 'Apply' and 'Clear'. The filter options are: Time, Performed By, Action, and Record Type.

The Audit Logs page shows you a list of all actions which users have committed in the system. Each row represents a different action, including the username of the user, the type of action, the type (and sometimes the ID) of the record on which the action was performed, and the date and time of the action. Using the filters menu to the right of the list, you can limit which audit log entries are displayed. You can filter by date and time or username. To apply a set of filters, click "Apply," and to clear out all filters, click "Clear."

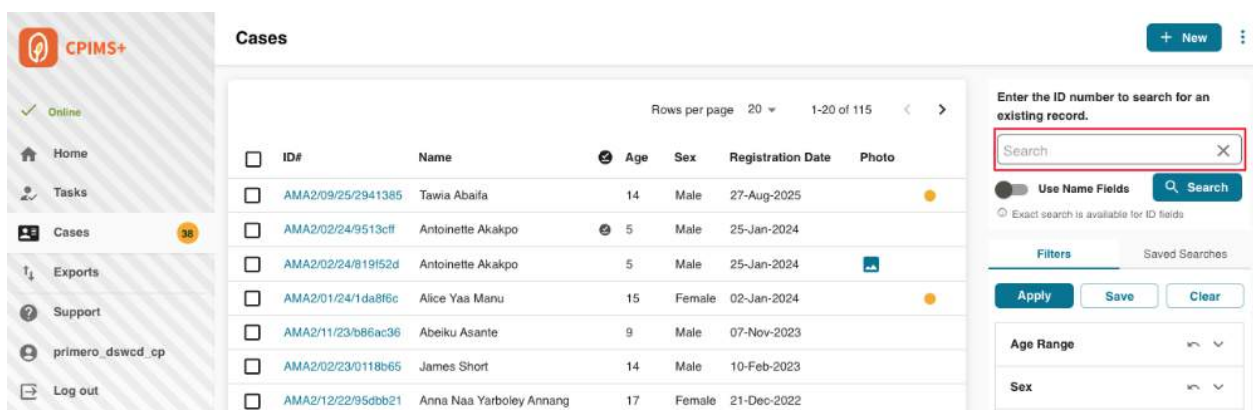
NOTE: The Audit Logs do not contain identifiable information from records. For instance, an audit log entry might tell you that the user "john-case-worker" edited a case with the ID "abcd123" at 10:15 on October 1, 2020. However, it will not tell you what specific information was added to the case.

NAVIGATING RECORD LISTS

As mentioned earlier, Primero offers three types of records: Cases, Incidents, and Tracing Requests. In most Child Protection configurations such as SWIMS, caseworkers only deal with Cases, and so only have access to the Case List. For this reason, in this section, we use the Case List as an example when discussing record list functionality.

Searching for Cases

In keeping with general standard operating procedures and best practice for case management, there should be one case per client / child. As a caseworker, you must therefore confirm that a client does not have a pre-existing case, before you create a new case. This can be done by searching existing case records belonging to your client using the search bar at the top right of the **Cases** page in your Navigation Menu.



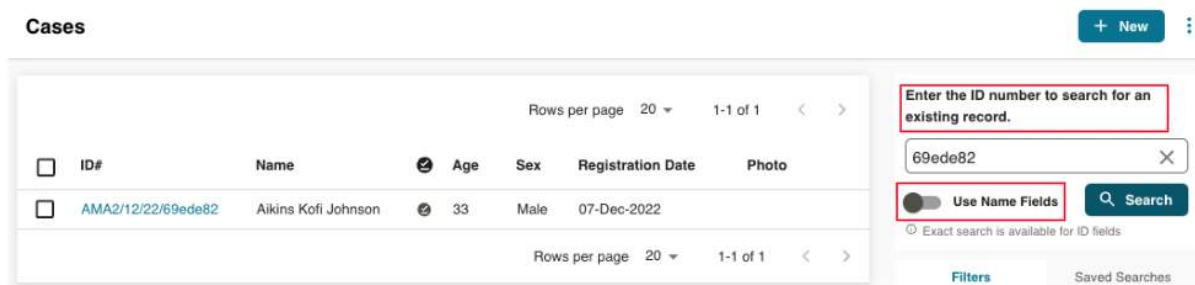
The screenshot displays the CPIMS+ interface. On the left is a navigation menu with options like Home, Tasks, Cases (38), Exports, Support, and Log out. The main area shows a table of cases with columns for ID#, Name, Age, Sex, and Registration Date. On the right, a search sidebar is visible with a search bar, a 'Use Name Fields' toggle, and filter options for Age Range and Sex.

ID#	Name	Age	Sex	Registration Date	Photo
AMA2/09/25/2941385	Tawia Abaifa	14	Male	27-Aug-2025	
AMA2/02/24/9513c1f	Antoinette Akakpo	5	Male	25-Jan-2024	
AMA2/02/24/819f52d	Antoinette Akakpo	5	Male	25-Jan-2024	
AMA2/01/24/1da8f6c	Alice Yaa Manu	15	Female	02-Jan-2024	
AMA2/11/23/b86ac36	Abeiku Asante	9	Male	07-Nov-2023	
AMA2/02/23/0118b65	James Short	14	Male	10-Feb-2023	
AMA2/12/22/95d8b21	Anna Naa Yarboley Annang	17	Female	21-Dec-2022	

Enter your client’s name/nickname, Case ID or national/other ID number in the search bar to arrive at any pre-existing case records⁸ pertaining to them. You must pre-define what criteria you are using to perform a search using the toggle below the Search Bar. If you de-activate the ‘Use Name Field’ toggle, SWIMS will compare your query against the following fields:

- “Case ID” (both long and short ID)
- “National ID Number” or “Number of Other ID Document”

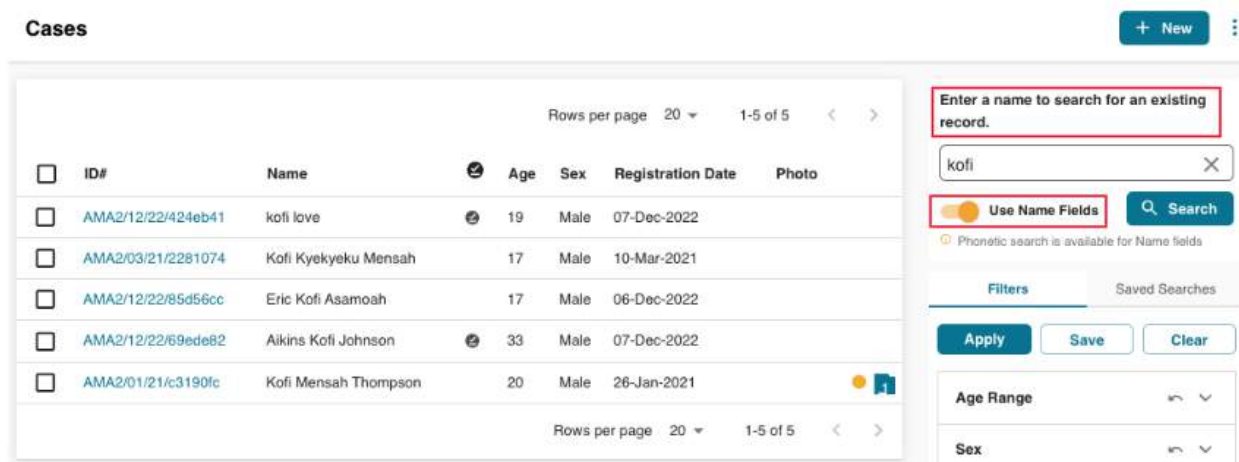
⁸ As of 2025, SWIMS is configured to use Case records only. However, Incident and Tracing Request records may also be added by the National System Administrator in the future. In the event of such additions to SWIMS, users may note that when searching for records of **Incidents**, the following fields will be compared against search queries - "Long ID," "Incident Code," "Account of Incident," "Survivor Code", and "Incident ID IR." For records of **Tracing Requests**, the following fields will be compared during search - "Long ID," "Inquirer ID," "Name of inquirer," and "Nickname of inquirer."



If you activate the ‘Use Name Field’ toggle, then SWIMS will compare your query against the following fields:

- “Name”
- “Other Name / Nickname”

In other words, you can use any of the above information available to search for a client’s case record. By default, search includes both open and closed cases.



Primerio's search uses phonetic matching to include results which have the same sound as your search term. For instance, if you search for 'John,' the result 'Jon Doe' will appear, even though the first name 'Jon' is not spelled with an 'h' like in your search term. While this method gives the user flexibility if they do not know exactly how to spell a name, it does come with limitations. For instance, if you search for 'Kofy Mensah,' and a child's full name is 'Kofi Kyekyeku Mensah,' it will not appear in your search results. This is because Primerio is searching for a name which contains the words / sounds you typed, in order. Basically, when Primerio compares 'Kofy Mensah' to 'Kofi Kyekyeku Mensah,' it first determines that the sound 'Kofy' matches the sound 'Kofi,' but then decides that the sound 'Mensah' does not match the sound 'Kyekyeku,' and so excludes this individual from the search results. While this may seem limiting, it prevents Primerio's search from including irrelevant results. So, if you search using a full name, and the Case you are seeking does not appear, try searching for the first, middle, and/or last name instead.

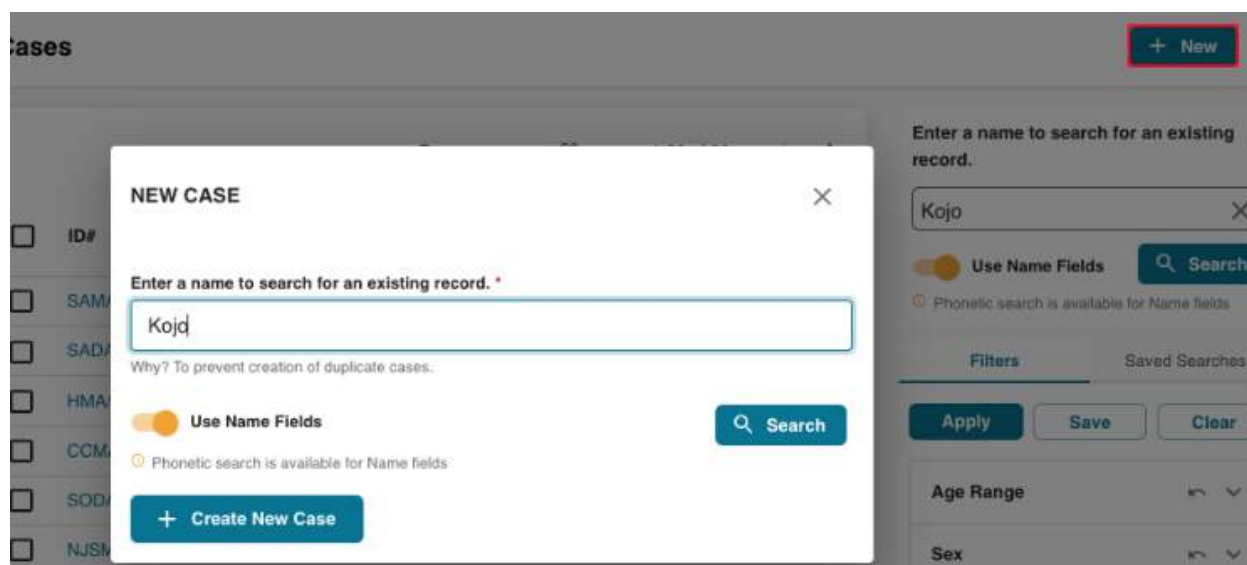
If a case worker searches “Kofi” OR “Mensah”, the case list will return names such as “Kofi Love” or “Kofi Mensah Thompson”.

If you are searching “Akiel Pilgrim”, the results will also include names with similar letters (a, i, l, k, r) such as “Adarius Balkaran”.

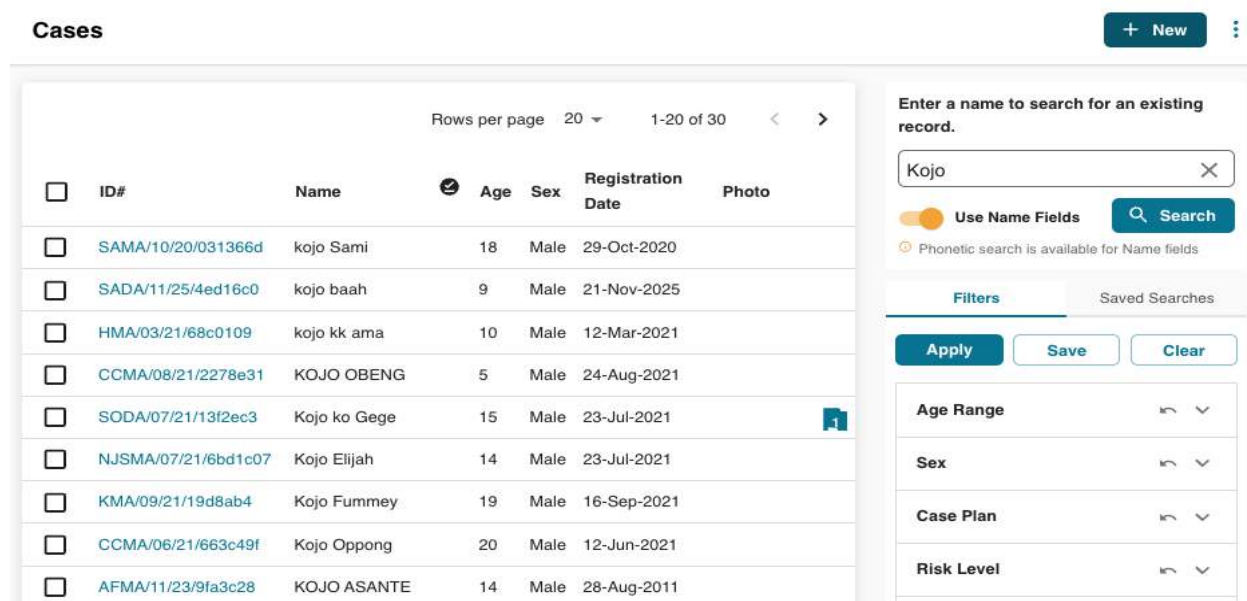
Note that you can search and filter the case list at the same time. For example, you can search for cases with the name "Smith" while filtering for only Male Cases with a Risk Level of "High". For more details on filtering, refer to the section below on “Filtering”.

Searching for Cases Managed by Other Users

Caseworkers and case managers have the ability to search for and view limited information about cases managed by other users. Users with this ability can perform a search through **NEW CASE** on the top-right corner, and arrive at the Search modal.



When they arrive at the Search Results page, they may see Cases for which they have full access (for example, a case they manage or own) as well as Cases for which they *do not* have full access (for example, a case managed or owned by another user at another organization or district). Remember to select ‘Use Name Fields’ when performing a search.



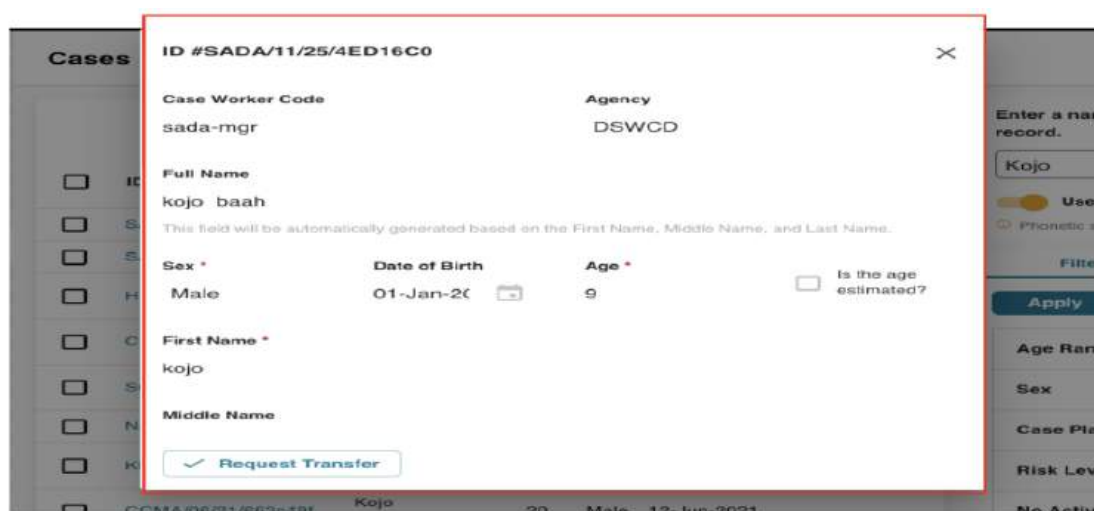
When you click on a Case in the Search Results page:

- If you have full access to this case, you will arrive at the View Case page.
- If you *do not* have full access to this case, the **View Details** modal appears.

View Details Modal

The **View Details** modal displays a small set of fields about a Case. This allows you to view limited information about a Case managed by another user, without compromising the data confidentiality of the Case. As mentioned previously, caseworkers should not create a case if the client/child already has a case recorded in the system!

You can see a button labelled **Request Transfer** at the bottom of this modal. For more information on this action, please see the “Transfers” sub-section under the Action Menu section.



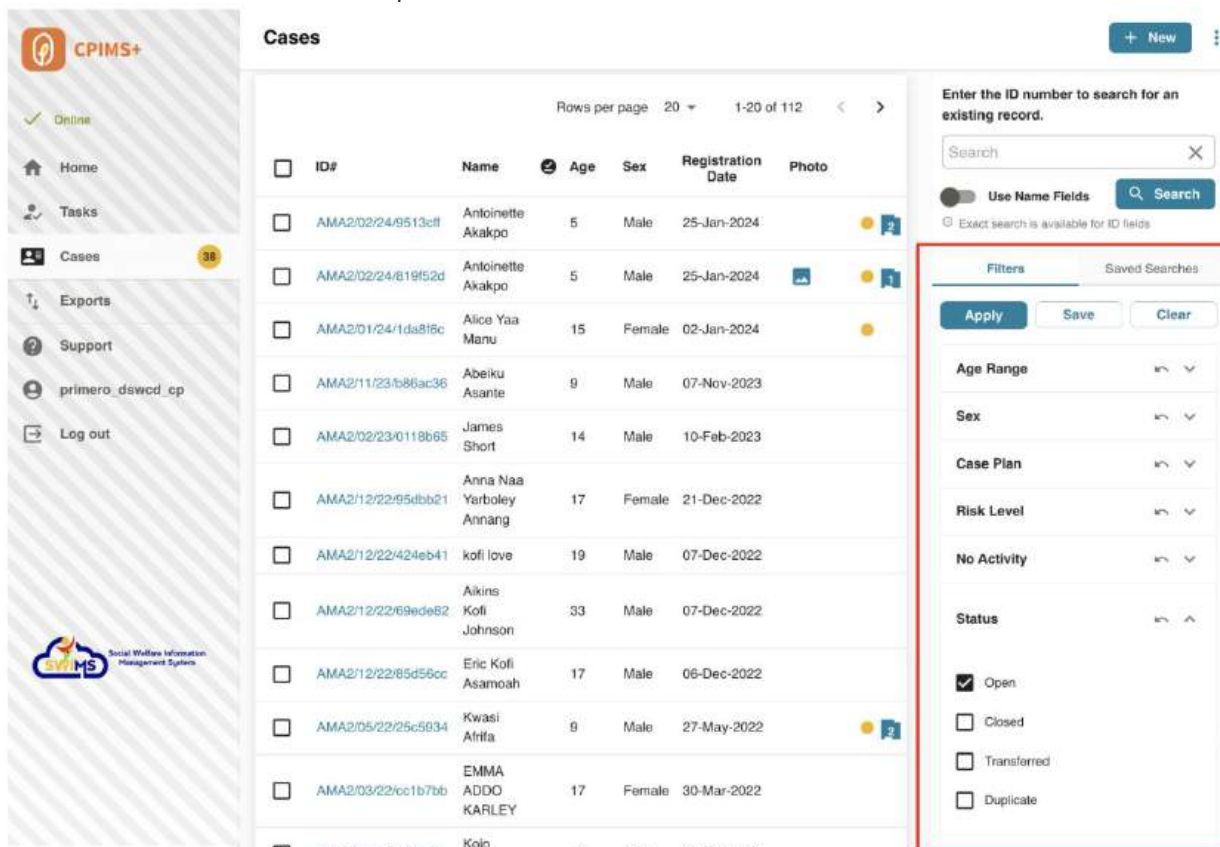
NOTE: As SWIMS allows users to upload photos for a Case, you may also be able to see the Case's photo in this modal as and where available.

Filtering

Filtering is an efficient way to find a single record or set of records that need your immediate attention. Filtering allows you to search for a case with a particular feature.

On the right side of **Cases** page, you will see the **Filters** Panel on the right of the page. As an example, to search for all cases of women, you will filter by **Sex**. For cases of a certain age group, you can use the **Age Range** filter option. SWIMS thus allows users to search for cases using a number of filters including risk level, case status, no activity, etc. The most commonly used filters are always visible at the top of the Filters Panel. To expose additional filters, click

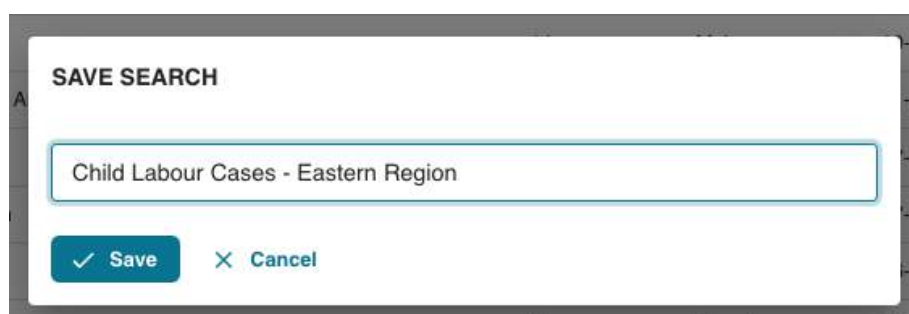
the "More" button below the panel. To hide these, click "Less".



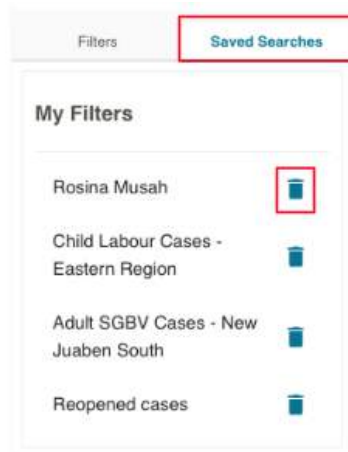
Once you have selected one or more filters, click the **Apply** button at the top of the Filters panel to update your list results. Note that by default, the **Cases** page and search results will only show those cases which are open. You can choose to show closed using the **Status** filters.

Similarly, the Cases page and search results will show Enabled cases by default. You can choose to view Disabled cases using the **Enabled / Disabled** filter as well. As SWIMS does not allow users to delete cases that have been accidentally created, users can choose to disable the cases instead. In other words, disabling a case is equivalent to deleting a case. It will no longer be visible to the case worker in the Cases List but remains in SWIMS for recording purposes. Note that “disabling” a case is different from “closure” which is done in the final stage of case management. Only “enabled” cases can be considered open, and further transferred or closed. For more information on this action, please see the “Disable” sub-section under the Action Menu section.

To clear the filters you have selected, click the **Clear** button at the top of the Filters Panel. You can also save a set of filters for later use by clicking the **Save** button at the top of the Filters Panel. This opens the modal pictured below.

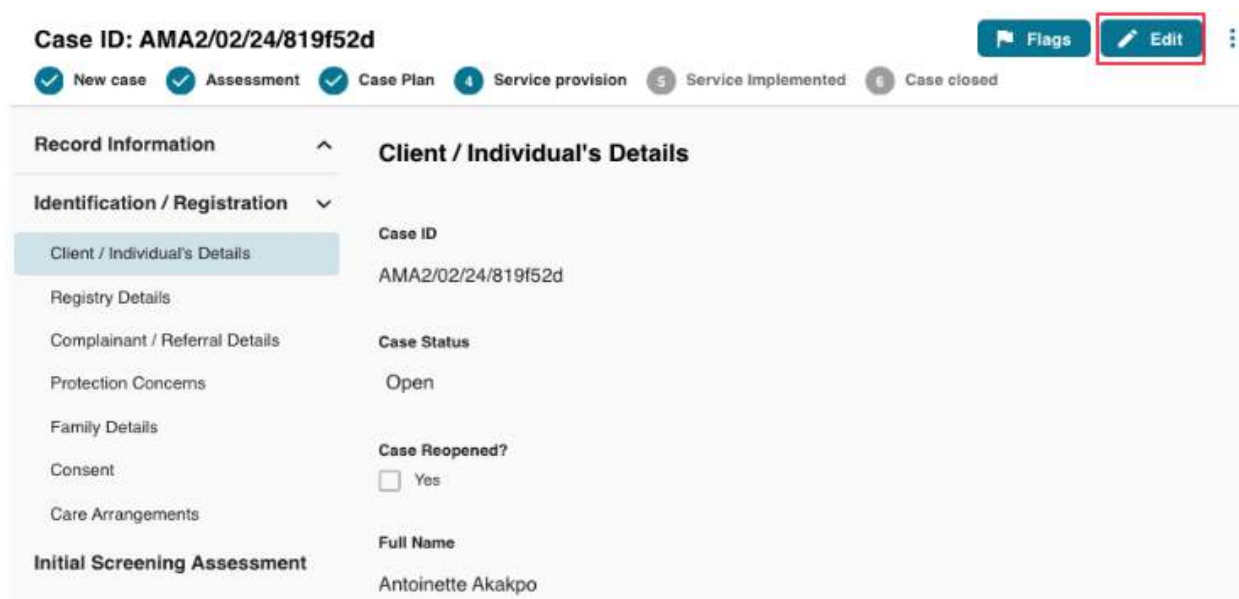


Enter a name for your recent search with the filters used, and click **Save**. Once the search has finished saving, you can access this anytime by clicking on the **Saved Searches** tab at the top of the filters panel. Here, you can find all searches with filters that you have saved earlier. Click on any saved search to apply the filters it contains. To delete a saved search, you can click on the trash can button next to it.



Viewing and Editing a Record

In the Case List, you can click on any Case to see more details. You will arrive at the View Case page as pictured below. On this page, you can only *view* information about the case; you cannot *edit* it. In order to edit information about the case, click the **EDIT** button with the pencil icon at the top right of the page.



You should now be able to update information in the case. Once you have made changes, click the **SAVE** button on the top right corner. Remember, if you do not click on the **SAVE** button, your changes will be lost.

Case ID: AMA2/02/24/819f52d Cancel Save

1 New case 2 Assessment 3 Case Plan 4 Service provision 5 Service Implemented 6 Case closed

Record Information **Comprehensive Assessment**

Identification / Registration

Initial Screening Assessment

Comprehensive Assessment

Comprehensive Assessment

Health and Physical Development

Psycho-social Development

Educational and Life Skills Development

Integration into the Family

Date Comprehensive Assessment Started: 10-Jul-2025

Date Case Plan Due: 23-Jul-2025

Add Person(s) consulted/contributed to this assessment + Add

Grace

For more information on this, please see the “Creating, Viewing, or Editing a Case” sub-section under the Navigating Case Forms section. Note that your permissions will determine your ability to view and edit cases. As a DSWCD caseworker on SWIMS, you can only view and edit your own cases while as a DSWCD case manager, you can view and edit all cases owned by your team. As a Regional or National case manager, you can only view case records, not edit. National System Administrators and National Protection Officers do not have the permission to view or edit case records.

Workflow Status Bar

While viewing or editing any Case record, users can see the **Workflow Status Bar** on the top of the screen. This depicts which stage a case has reached based on the case management workflow based on Ghana’s Case Management SOPs for children in need of care and protection⁹. Each stage of the workflow is set by certain fields or actions performed by caseworkers and DSWCD case managers as follows:

- **New** – This status is set by default when a case is first created.

Case ID: AMA2/12/22/95dbb21 Flags Edit

1 New case 2 Assessment 3 Case Plan 4 Service provision 5 Service Implemented 6 Case closed

Record Information **Client / Individual's Details**

Identification / Registration

Client / Individual's Details

Registry Details

Complainant / Referral Details

Protection Concerns

Case ID: AMA2/12/22/95dbb21

Case Status: Open

- **Assessment** - This status is set when you enter a date in the "Date Assessment started" field on the Initial Screening Assessment form.

⁹ Available here: <https://www.mogcsp.gov.gh/department-of-social-welfare/>

Case ID: AMA2/05/22/25c5934 Flags ²

New case
 Assessment
 Case Plan
 Service provision
 Service implemented
 Case closed

Record Information ^ **Initial Screening Assessment**

Identification / Registration ^

Initial Screening Assessment

Comprehensive Assessment ^

Date Assessment started

29-May-2022

This field is used for the Workflow status.

- **Case Plan** - This status is set when you enter a date in the "Date Case Plan Initiated" field on the Case Plan form.

Case ID: AMA2/07/21/ecf84ca Flags

New case
 Assessment
 Case Plan
 Service provision
 Service implemented
 Case closed

Assessment ^ **Case Plan Developed and Participants Involved**

Social Enquiry Report

Case Plan

Reunification Details ^

Date Case Plan Initiated

17-Dec-2019

This field is used for the Workflow status.

- **Service Provision** – This status is set when you add an entry to the Services sub-form.

Case ID: AMA2/07/21/dc5973d Cancel Save

New case
 Assessment
 Case Plan
 Service provision
 Service implemented
 Case closed

Services / Follow Up v **Services**

Activities

Services

Follow Up

Case Conference Details

Add Services + Add

Service provision >

- **Service Implemented** – This status is set when all services entries for a case are marked as complete using the “Service Implemented On” field in the services sub-form.

- Closed** - This status is set when you perform the **CLOSE** action on a Case. For more information on this action, please see the “Close” sub-section under the Action Menu section.

- Reopened** - This status is set when you perform the **REOPEN** action on a Case. Note that this action is only available for closed cases. For more information on this action, please see the “Reopen” sub-section under the Action Menu section.

For cases that have been reopened, the Workflow Status Bar is automatically set to the beginning with the "Reopen" status appearing where the "New" status normally appeared. This indicates that the case management workflow has started from the beginning as depicted below.

Case ID: AMA2/02/23/0118b65

1 Case reopened 2 Assessment 3 Case Plan 4 Service provision 5 Service Implemented 6 Case closed

Record Information ^

Identification / Registration v

Client / Individual's Details

Registry Details

Complainant / Referral Details

Protection Concerns

Family Details

Consent

Care Arrangements

Client / Individual's Details

Case ID
AMA2/02/23/0118b65

Case Status
Open

Case Reopened?
 Yes

NAVIGATING CASE FORMS

When you are viewing, creating, or editing a record in SWIMS, you can move between Forms using the **Form Navigation Menu**, which appears on the left side of the screen. Forms in SWIMS have been customized from the Case Management SOPs for Children in Need of Care and Protection.¹⁰

Case ID: AMA2/02/23/0118b65

1 Case reopened 2 Assessment 3 Case Plan 4 Service provision 5 Service Imp

Record Information ^

Client / Individual's Details

Case ID
AMA2/02/23/0118b65

Case Status
Open

Case Reopened?
 Yes

Full Name
James Short
This field will be automatically generated based on the First Name.

Other Name / Nickname

Date of Registration or Interview
10-Feb-2023

Form Navigation Menu:

- Online
- Home
- Tasks
- Cases 38
- Exports
- Support
- primero_dswcd_cp
- Log out

English

You will notice that some Forms appear under a collapsible header. This is called a **Form Group**. In the image below, "Identification / Registration" is a Form Group, which contains several forms namely "Referral Details", "Individual Details", "Care Arrangements", "Family Details", "Protection Concerns" and "Consent". When you click on a Form Group, the Form Group opens, and you arrive at the first Form in the group. Click on any other Form in the group to view that Form. To collapse an open Form Group, click on it again.

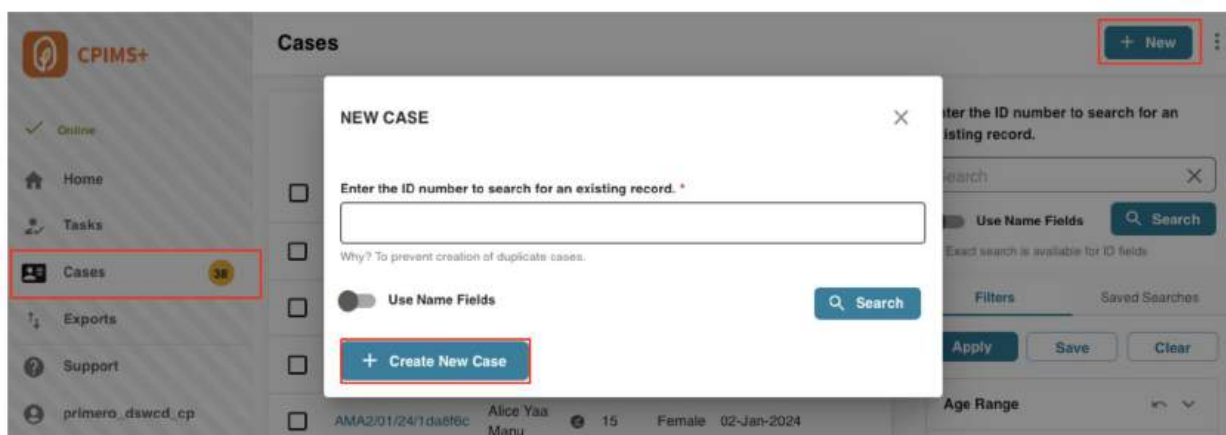
¹⁰ Available here: <https://www.mogcsp.gov.gh/department-of-social-welfare/>

Creating, Viewing, or Editing a Case

In SWIMS, MMDA-level caseworkers, case managers, supervisors and service providers can create, view and edit cases. Regional and National case managers can only view cases, while National Protection Officers and National System Administrators do not have permission to create, view or edit cases.

Creating a Case

To create a new case, you must first go to the **Cases** page. From the Case List, click on the **+NEW** button at the top of the screen. You will see a modal like the one pictured below.



Before creating a new case, you must first run a search to check whether a record already exists for the client you are registering. You cannot create a new case if the client/child has already a case record in SWIMS. To search for an existing record:

- You can type the individual's name or ID into the search bar and then click the **SEARCH** button at the bottom right of the modal. If there is a match in the system, you will be taken to a search results page, which may include Cases managed by other users. For more information on how to search, see the “Searching for Cases” sub-section above under the Navigating Records Lists section.
- If you find a match in the system, as a caseworker or case manager, you may request a transfer of the case or alternatively refer your client to the user managing the record. For more information on how to transfer and refer cases, see the “Assignments, Transfers and Referrals” sub-section in the Action Menu section.

- If your search does not yield any match, as a caseworker or DSWCD case manager, you will be taken to a blank case form and asked to create a new case through a prompt appearing at the bottom of your screen. Once you have reached the new case page, you can navigate to different case forms as described in the “Navigating Case Forms” section.

Editing a Case

To edit a case, enter the case record and click the **EDIT** button on the top right of the screen. The page will then allow you to edit information across the case forms. In general, case forms on SWIMS contain several different field types which you can edit. These are as follows:

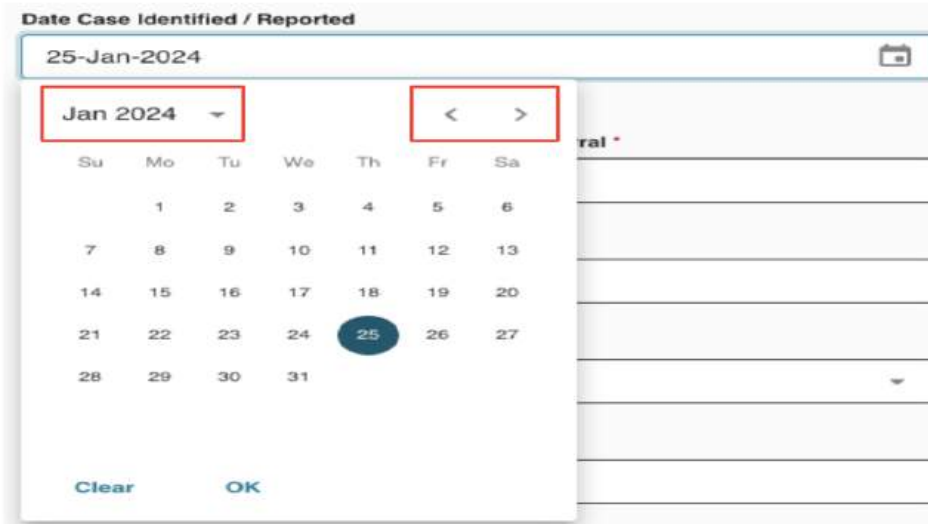
- **Text Field** – To enter data in a text field, click on it and type normally using your keypad or keyboard.

- **Text Area** - Similar to a Text Field, this type of field expands as you type, allowing you to enter more information.

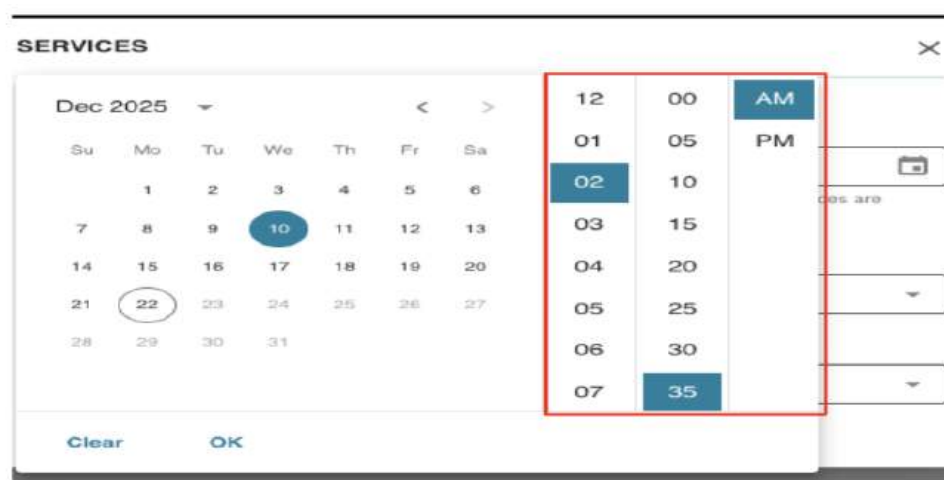
- **Tick Box** - Select the tick box if the statement in its label is true.

- **Date Field** – Click on this field to open a calendar where you can directly select the day, month, and year. Note that the calendar is set to today’s date by default.

- To choose a different calendar month, click on the side arrows < > to navigate forwards or backwards.
- To choose a different year, click on the year at the top left of the calendar. This will open a menu. Scroll to find the appropriate year and select it.
- Once you have set the right month and year, select a date from the calendar.
- Click **OK** to set your selected date. By clicking **CLEAR**, the calendar will return to today's date. Click **CANCEL** if you do not want to edit this field.



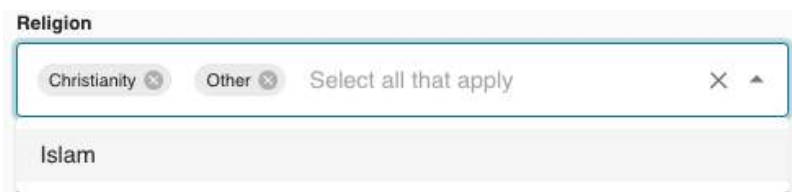
- **Date-Time Field** - Similar to the **Date Field**, this allows you to set a time along with a date. Note that the time field is set to the time on your device by default.
 - To choose a different time, click on time figures on the right. Use the three columns to select the hour, minute and AM/PM.
 - Click **OK** once done.



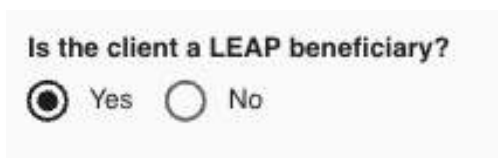
- **Select Dropdown** - Select an option from the dropdown menu. You can also try typing a word into the (Select...) field to narrow down the menu or find a specific option faster.



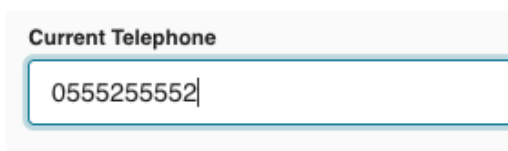
- **Multi-Select Dropdown** - Similar to Select Dropdown, this field allows you to select more than one option from the dropdown menu.



- **Radio Button** - Similar to the Tick Box, click on the correct answer.




- **Numeric Field** - Type a number into the field. Any non-numeric characters (such as text) will return an error.



Required Fields

A form may contain required fields i.e. fields that are compulsory to fill. Required fields can be identified by the red star (*) next to the field name.



You will receive an error if you try to save a Case without filling the required fields. A red error message, such as the one below, will appear on the corresponding forms in the Form Navigation Menu to help you identify and complete the required fields.

New Case X Cancel

Record Information ^

Identification / Registration ● v

Client / Individual's Details ●

Registry Details

Complainant / Referral Details ●

Protection Concerns ●

Family Details

Consent You cannot edit this

Care Arrangements

Initial Screening Assessment

Comprehensive Assessment ^

Social Enquiry Report

Case Plan

Reunification Details ^

Services / Follow Up ^

Client / Individual's Details

● You need to address 7 fields on this form

Case ID

Case Status

Open v

Case Reopened?

Yes

Full Name

This field will be automatically generated based on the First Name, Middle Name, and Last Name.

First Name *

● You need to address 15 fields on 3 forms x

Record Information ^

Identification / Registration ● v

Client / Individual's Details ●

Registry Details

Complainant / Referral Details ●

Protection Concerns ●

Family Details

Consent

Care Arrangements

Client / Individual's Details

● You need to address 7 fields on this form ^

- Surname is required
- Sex is required
- Age is required
- Nationality is required
- Current Address is required
- Current Location is required
- Does the client have an active NHS card? is required

If you enter a field incorrectly, the system will return a similar series of error messages and alerts when you try to save the case. In the example below, a negative age was entered and the Date of Birth provided occurred in the future. This will result in error messages continually showing, until the mistakes have been resolved. If an error message shows despite entering correct information, please log out and log in again. If the message continues to show, kindly contact the National System Administrator.

Age *

-3

Age must be between 0 and 130

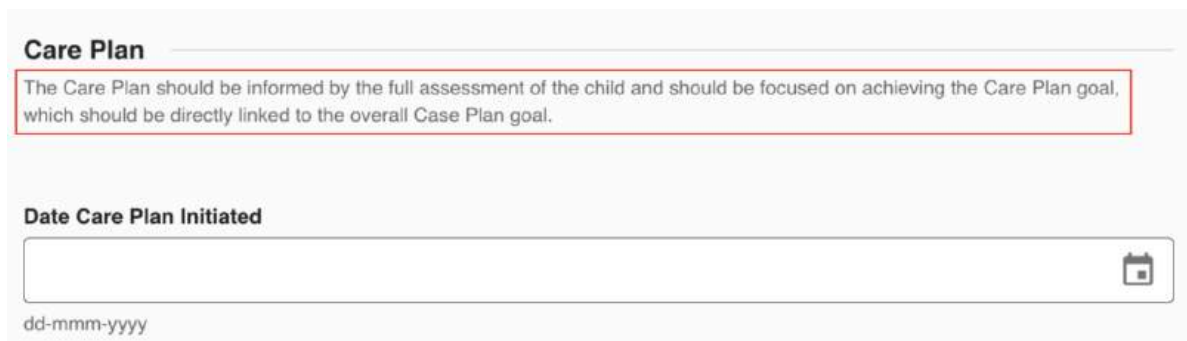
Date of Birth

01-Jan-2028

Cannot be in future.

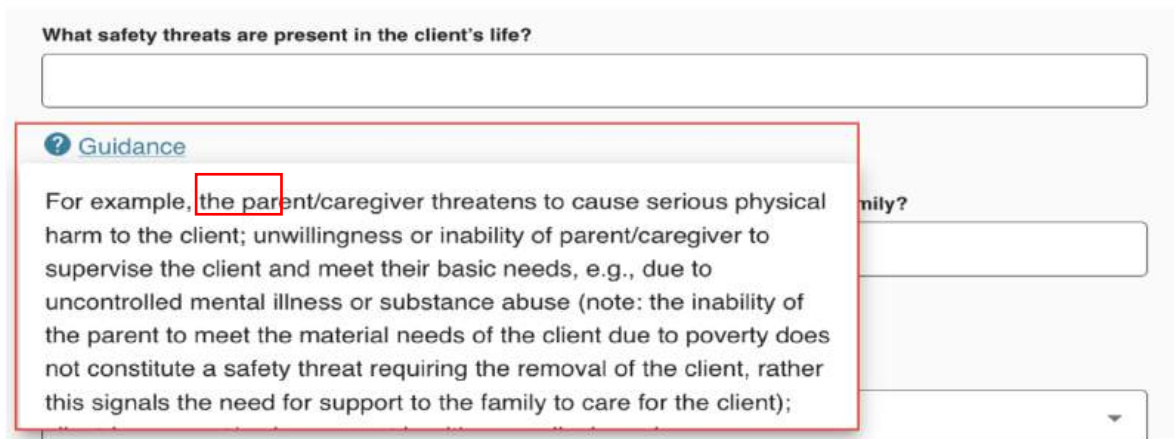
Guidance and Help Text

In SWIMS, several forms contain fields with **Help Text**, which is grey assistive text under a field to help you determine what the field is used for.



The screenshot shows a form titled "Care Plan". Below the title, there is a red-bordered box containing the following text: "The Care Plan should be informed by the full assessment of the child and should be focused on achieving the Care Plan goal, which should be directly linked to the overall Case Plan goal." Below this, there is a field labeled "Date Care Plan Initiated" with a calendar icon on the right. Below the field, the text "dd-mmm-yyyy" is displayed.

Some fields may contain **Guidance**, which is a more detailed summary of the field. Guidance texts are usually derived from the Case Management SOPs for Children in need of care and protection¹¹. Click on the blue **Guidance** word to view detailed Guidance text for the field above.



The screenshot shows a form with a field titled "What safety threats are present in the client's life?". Below the field, there is a red-bordered box containing the following text: "For example, the parent/caregiver threatens to cause serious physical harm to the client; unwillingness or inability of parent/caregiver to supervise the client and meet their basic needs, e.g., due to uncontrolled mental illness or substance abuse (note: the inability of the parent to meet the material needs of the client due to poverty does not constitute a safety threat requiring the removal of the client, rather this signals the need for support to the family to care for the client);". The word "Guidance" is highlighted in blue with a question mark icon to its left.

Navigating Subforms

Some Forms contain information that is entered multiple times. For example, when a case must provide the Name, Age, Date of Birth for multiple family members of a client in their case record using the 'Family Details' subform. Another example is when a single client receives multiple services resulting in the same nature of information being filled out several times using the 'Services' or 'Follow Up' subforms. In situations like this, SWIMS organizes information in **Subforms**. To add or update a subform, start by clicking on **EDIT** on the top right corner of the form.

Adding Subforms

When you click into a Form that contains a subform, you will see an **ADD** button. Click this to add a **Subform** entry.

¹¹ Available here: <https://www.mogcsp.gov.gh/department-of-social-welfare/>

Family Details

Notes about Family

Add Family Details + Add

! No Family Details found. They need to be added.

A subform modal will appear where you can enter information about the family member.

New Case

- Record Information
- Identification / Registration
 - Client / Individual's Details
 - Registry Details
 - Complainant / Referral Details
 - Protection Concerns
 - Family Details**
 - Consent
 - Care Arrangements
- Initial Screening Assessment

Family Details ×

< Add and Return X Cancel

Name

How are they related to the individual?

(Select...)

Is this person the caregiver?

Yes

Sex

(Select...)

For example, in the Family Details form, you can add a subform with information about your client's sibling. You can then add another subform with information about your client's caregiver. In this manner, you can add multiple subforms – one for each member of the client's family. All of these subforms will be available under the Family Details form. When you are done filling in information, click **ADD AND RETURN** at the top of the subform modal. Note that if you click **CANCEL** instead, you will lose any new changes. Remember to **SAVE** your changes after completing all subform entries.

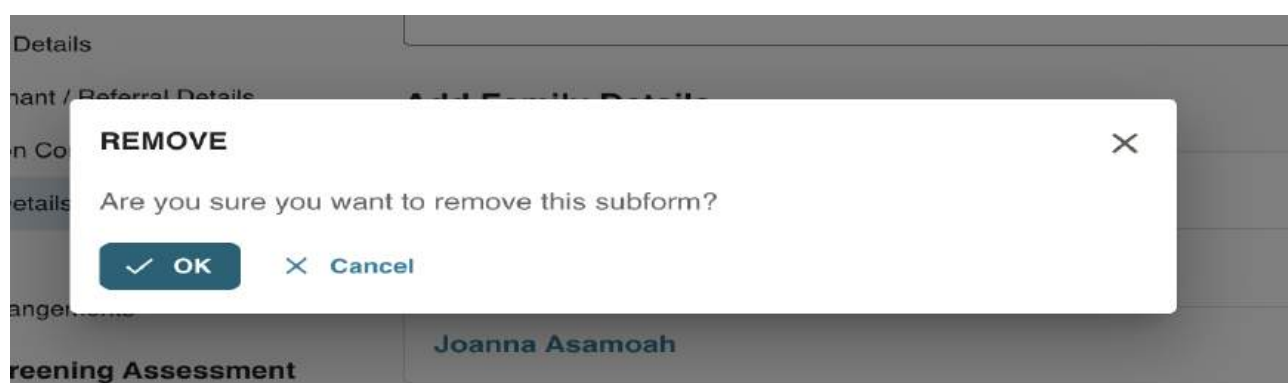
Updating Subforms

If multiple subforms are added in this way, they will be listed in collapsed form. Each subform can be reopened by clicking on the right-side arrows. Once you are finished with your edits, click **UPDATE AND RETURN** at the bottom of the subform and **SAVE**.



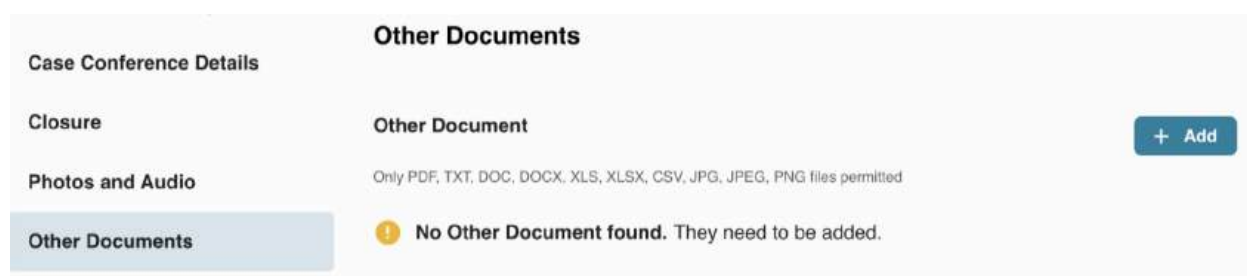
Removing Subforms

To remove a subform, click on the trashcan icon on the collapsed subform. A modal will appear asking you to confirm your decision.



Other Documents

To upload PDF, TXT, DOC, DOCX, XLS, XLSX or CSV files, go to the “Other Documents” form. The maximum size of an upload is 10MB. You can upload up to 100 documents in 1 case record. Note: This limit applies only when using the Primero X hosted service.



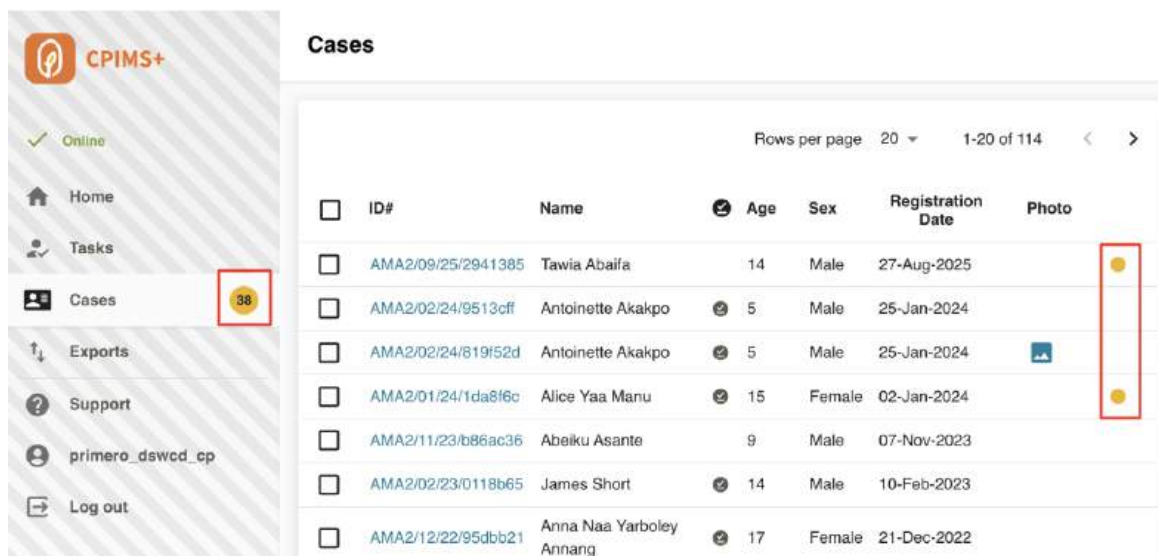
Alerts

Alerts help you keep track of updates to a Case record. Alerts are represented by small gold dots or message banners. Alerts can appear against different case records or against individual forms within a case.

Case-level alerts

- On the Navigation Menu, an alert next to the Cases link tells you the total number of cases with alerts. In other words, the gold dot in the picture below depicts the number of case records, owned by you as a caseworker or within your team as a case manager, that have updates.

- In the Case Records List, a small gold dot appears next to each Case with one or more alerts, as can be seen below



Form-level alerts

- When you click into a case, an alert in the Form Navigation Menu indicates the form which has updated information from another user.
- When you click into the form, you can see a message banner alert that informs you of the reason for the alert.

Case ID: AMA2/09/25/2941385

New case
 Assessment
 Case Plan
 Service provision
 5 Service Implemented
 6 Case closed

Initial Screening Assessment

Comprehensive Assessment ^

Social Enquiry Report

Case Plan ●

Reunification Details ^

Services / Follow Up ^

Case Plan

● Approval is pending for Case Plan

Approval Type

Case Plan

Approved by Manager

Yes

Alerts appear in any of the following situations:

- As a caseworker, when you request approval for Assessment, Case Plan, and/or Closure. Alerts will appear on the corresponding form(s) pending approval. Once the form is approved or rejected by your case manager, the alert goes away. As a case manager, alerts appear for all cases and respective forms therein with pending approval.

- When a new referral is made to you.
- When a new transfer is made to you.
- As a caseworker, when your case manager adds a **Note** to your case. Once you view the note, edit and save your Case, the alert goes away.
- As a caseworker, when another SWIMS user directly edits a Services sub-form on your case. Once you edit and save your Case, the alert goes away.

Alerts and email notifications can be enabled for when updates are made by a service provider or when a case is updated by another user sharing the same case. This can be configured by your National System Administrator in coordination with the Primero Team.

Note, services can be added to the user's profile as well as to the agency. If a service is added to the agency, all users will also by default provide those services. If a service is added to the user profile, and then a service is removed, by default they will not also have the services added to their agency.

Flagging

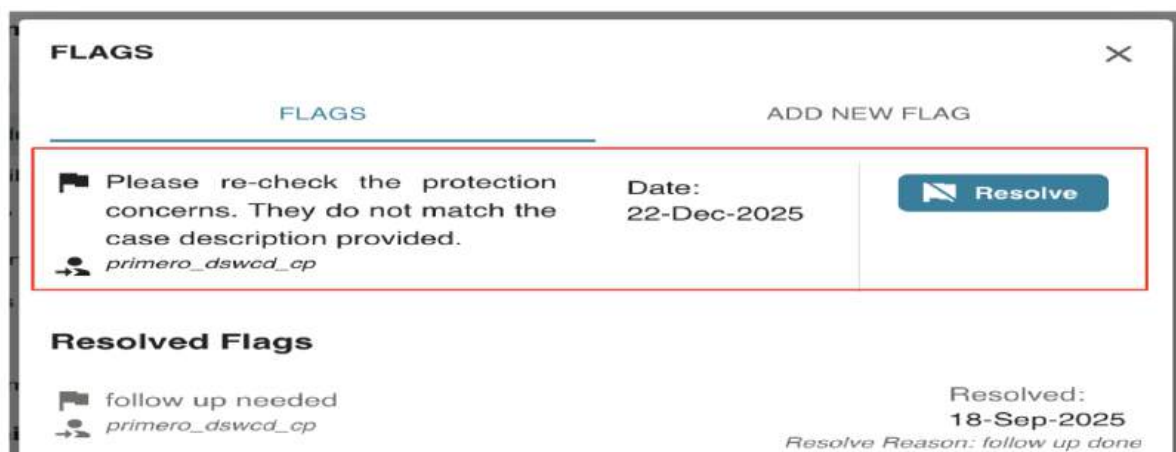
The **Flags** button allows a caseworker or case manager to leave a message or a "Flag" on a record. Usually, this is a reminder to other users that they need to perform an action. For example, a case manager may add a "flag" to remind a case worker to perform an assessment or a caseworker may add a "flag" to remind their case manager to approve a Case Plan. The **Flags** button can be accessed at the top right corner of any individual case record. This button is available only to case workers and case managers (at all levels).

The screenshot shows a case record interface for Case ID: AMA2/09/25/2941385. At the top right, there are two buttons: 'Flags' (highlighted with a red box) and 'Edit'. Below the buttons is a progress bar with six steps: 'New case', 'Assessment', 'Case Plan', 'Service provision', 'Service Implemented' (marked with a '5'), and 'Case closed' (marked with a '6'). The main content area is divided into two columns. The left column has a 'Record Information' header and a list of sections: 'Identification / Registration' (expanded), 'Client / Individual's Details' (selected), 'Registry Details', 'Complainant / Referral Details', and 'Protection Concerns'. The right column has a 'Client / Individual's Details' header and displays 'Case ID: AMA2/09/25/2941385' and 'Case Status: Open'.

When you click the Flags button, a modal such as the one below will appear with two tabs: "Flags" and "Add New Flag". The "Flags" tab will open by default. On this tab, you will see a list of all previous flags added to this case record. To add a new flag, click on the "Add New Flag" tab. Here, you can enter a reason for your flag, as well as a flag date.



Once you click **Save**, you will arrive back on the "Flags" tab. Here, you will see the flag you just saved. This “Flag” will now be visible to all users that have full access to this case record.



In the Case List, any case records with active flags will appear with a flag icon displaying the number of active flags on that record. Caseworkers and case managers may also use the Search Filter to generate a list of flagged cases only.

Cases

Rows per page 20 1-20 of 114 < >

<input type="checkbox"/>	ID#	Name		Age	Sex	Registration Date	Photo	
<input type="checkbox"/>	AMA2/09/25/2941385	Tawia Abaifa		14	Male	27-Aug-2025		
<input type="checkbox"/>	AMA2/02/24/9513cff	Antoinette Akakpo		5	Male	25-Jan-2024		
<input type="checkbox"/>	AMA2/02/24/819f52d	Antoinette Akakpo		5	Male	25-Jan-2024		
<input type="checkbox"/>	AMA2/01/24/1da8f6c	Alice Yaa Manu		15	Female	02-Jan-2024		

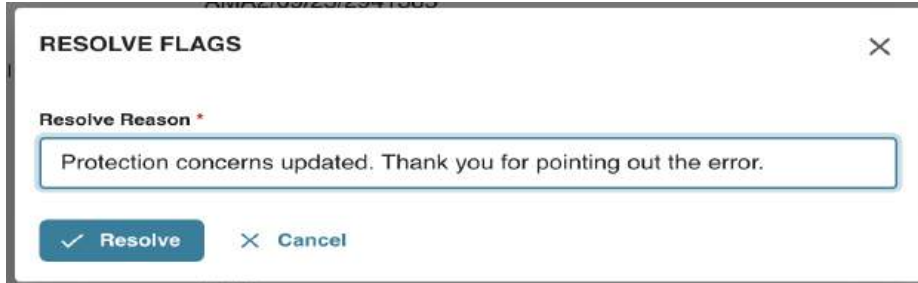
When viewing a case record with active flags, the **Flags** button on the top right corner will display a small gold circle indicating the number of active flags.



Once a flag is no longer relevant (for example, when your case manager has read the flag and approved your Case Plan as requested), you can resolve the flag. To do this, start by clicking the **Flags** button on the top right corner of the case record. Go to the “Flags” tab and click the **Resolve** button next to the flag you would like to resolve. Note that only some users have the permission to Resolve Flags (refer to **Annex A** for more information).



A modal will now appear where you can enter your reason for resolving the flag. Note that only the user who originally created a flag can resolve it.



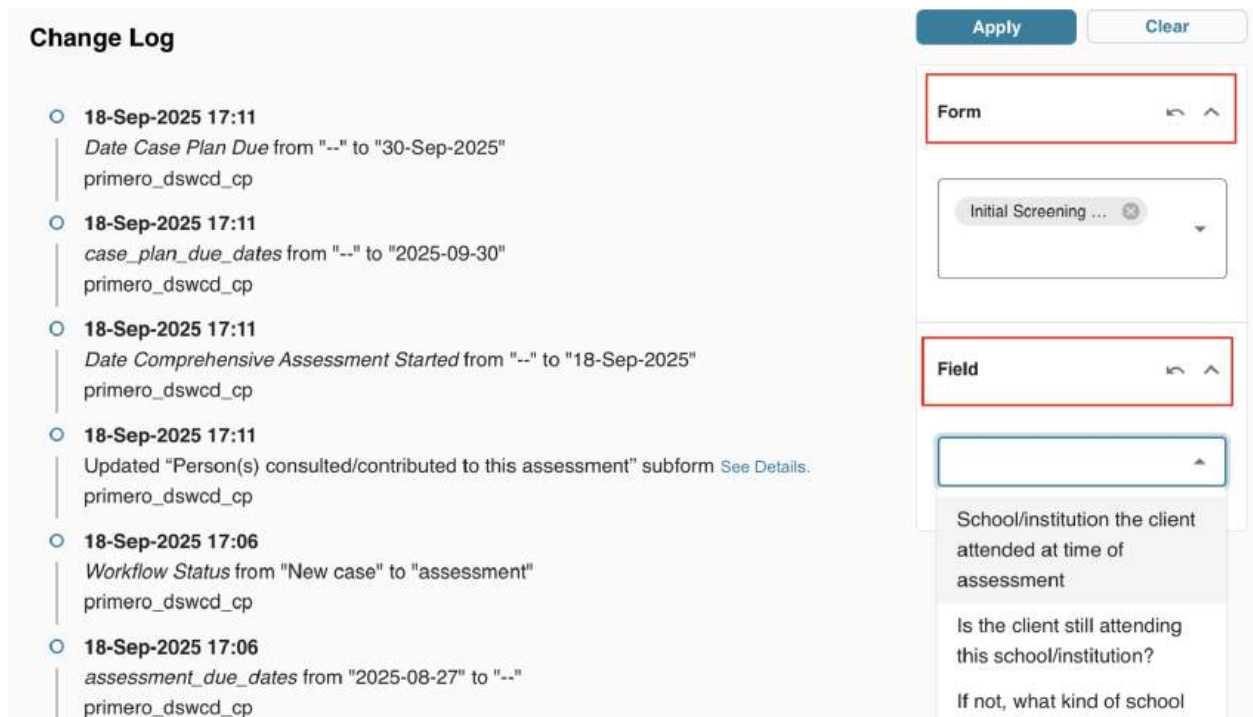
Once the flag is resolved:

- It will appear under the "Resolved Flags" header in the "Flags" tab of the Flags modal, as can be seen in the figure below.
- It will no longer be included in the count of active flags which appears in the record list and on the "Flags" button.



Change Log

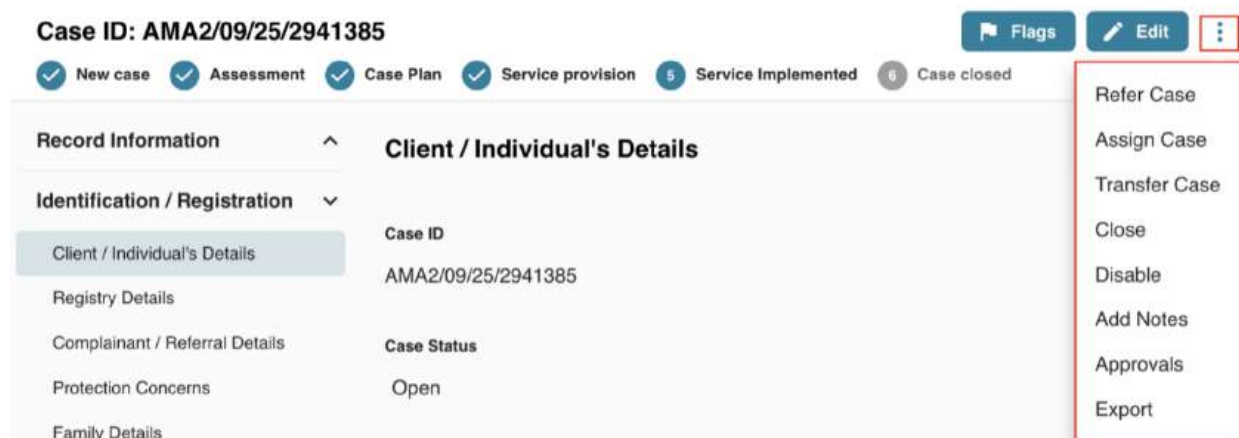
Some user roles may see a page under Record Information called the “Change Log” (refer to **Annex A** for the latest information on user roles and permissions). This page tracks all changes made to that Case, as well as the name of the user who made those changes. Changes can include simple field editing, updated subforms, and other actions such as approvals or transfers. To see a list of changes to a case record, start by selecting the specific form and/or field on the right side.



ACTIONS MENU

The **Actions Menu** allows a user to carry out a variety of actions with respect to a case record. To view this menu, click on the small button with three dots at the right of the **EDIT** button on the View Case page. The actions available to you will depend on your user role and permissions. The figure below shows all actions available to a DSWCD case manager as of December 2025. Based on individual permissions, SWIMS users will have access to any of the following actions:

- Refer Case
- Assign Case
- Transfer Case
- Close / Reopen
 - Note: This action will appear as "Close" if the Case is open, and "Reopen" if the Case is closed.
- Disable / Enable
 - Note: This action will appear as "Disable" if the Case is enabled, and "Enable" if the Case is disabled.
- Add Notes
- Approvals
- Export

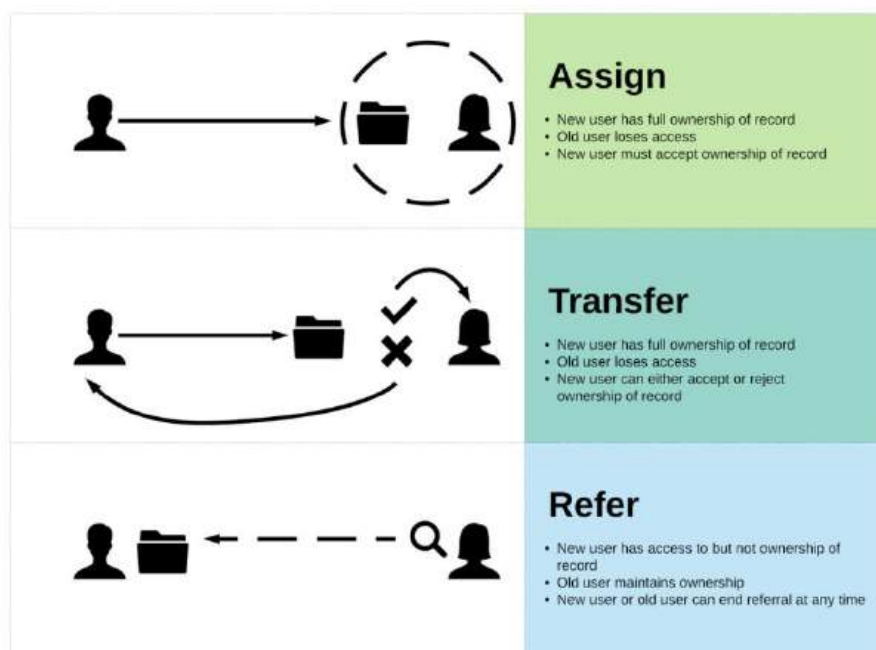


NOTE: When using these actions, you must follow the Case management SOPs for Children in need of care and protection¹². SWIMS does not replace normal day-to-day communications (e.g. Email, Text, WhatsApp) between the people and organizations that perform social welfare case work.

Assignments, Transfers, and Referrals

There are three very important actions which allow you give another user access to your case: *Assign*, *Transfer*, and *Refer*.

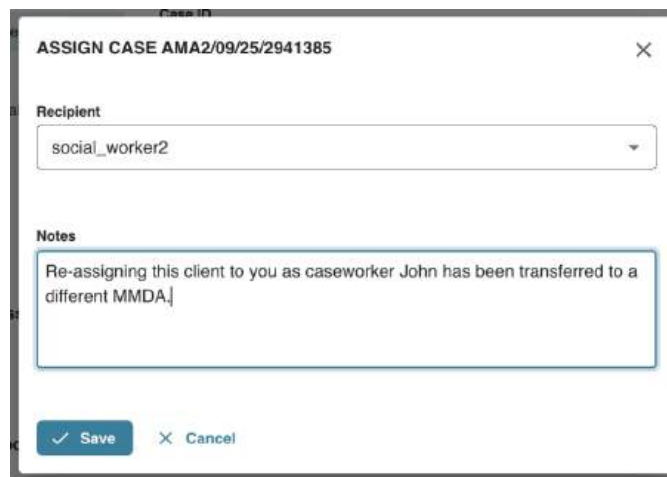
¹² Available here: <https://www.mogcsp.gov.gh/department-of-social-welfare/>



Assignments

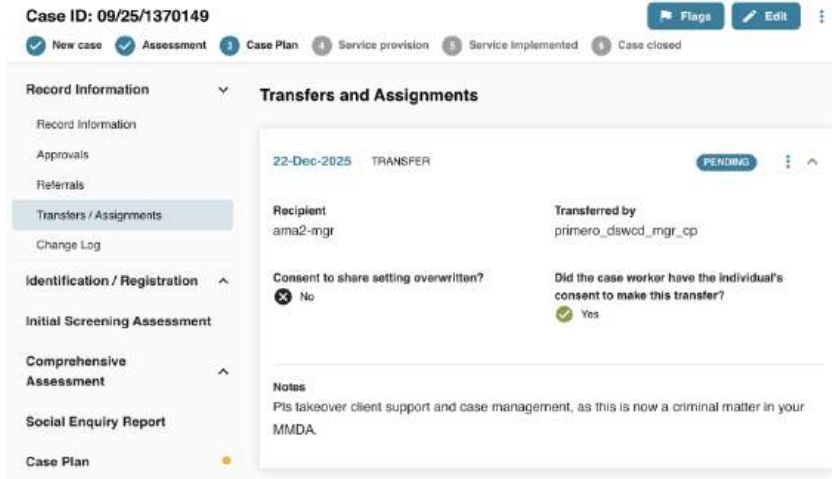
MMDA-level case manager roles can typically assign a case to a different SWIMS user. If you select the **Assign Case** action from the Actions Menu, a modal will appear that allows you to select from existing users. Assigning the case will change the case record owner to the selected user.

The new owner will have full access to the case record, and the previous case worker will lose their access.



Transfers

Managers can also transfer a case record to a different user. Unlike case assignments, however, transfers give the recipient the opportunity to accept or reject the transfer. If the recipient rejects the transfer, the case record will stay with its original owner. If the recipient accepts the transfer, they will now have full ownership over the case record, and the original owner will no longer have access.



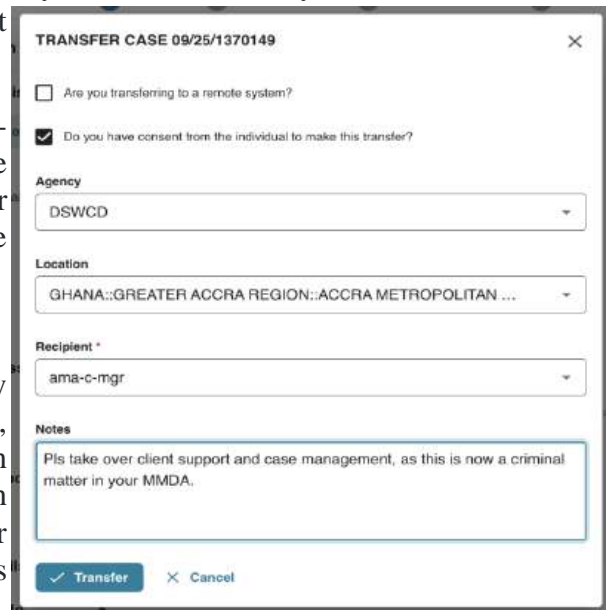
When you select the **Transfer Case** action from the Action Menu, a modal will appear as per the figure to the right. To transfer a case, SWIMS users must obtain consent of the client. Where this is unavailable, a case manager may use the Consent Override function. You may also be asked if you are transferring to a remote system (i.e. someone who does not use SWIMS).

To select the recipient that you are transferring to, first select the agency and location associated with the recipient. Once you have selected an agency and location for your transfer, the "Recipient" field will only display users who are part of that agency and based in that location.

If the desired recipient does not appear in the drop-down menu, it means that the recipient does not have permission to receive case transfers on SWIMS or that the intended recipient does not belong to the Agency or Location selected.

Accepting or Rejecting Transfers

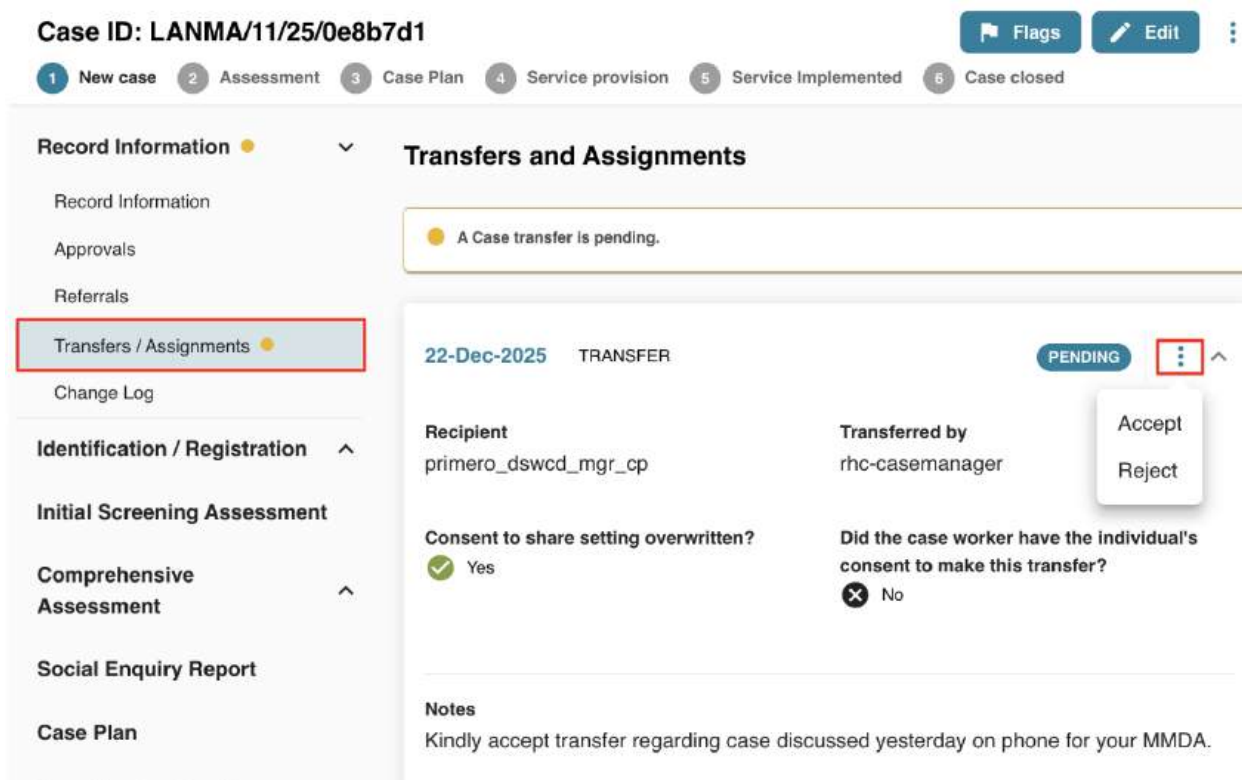
SWIMS caseworkers and case managers typically have the ability to receive case transfers. Remember, you will always receive an email notification whenever any case is transferred to you. Information on cases transferred to you is also visible on your dashboard under "Shared with Me - Transfers Awaiting Acceptance".



Home

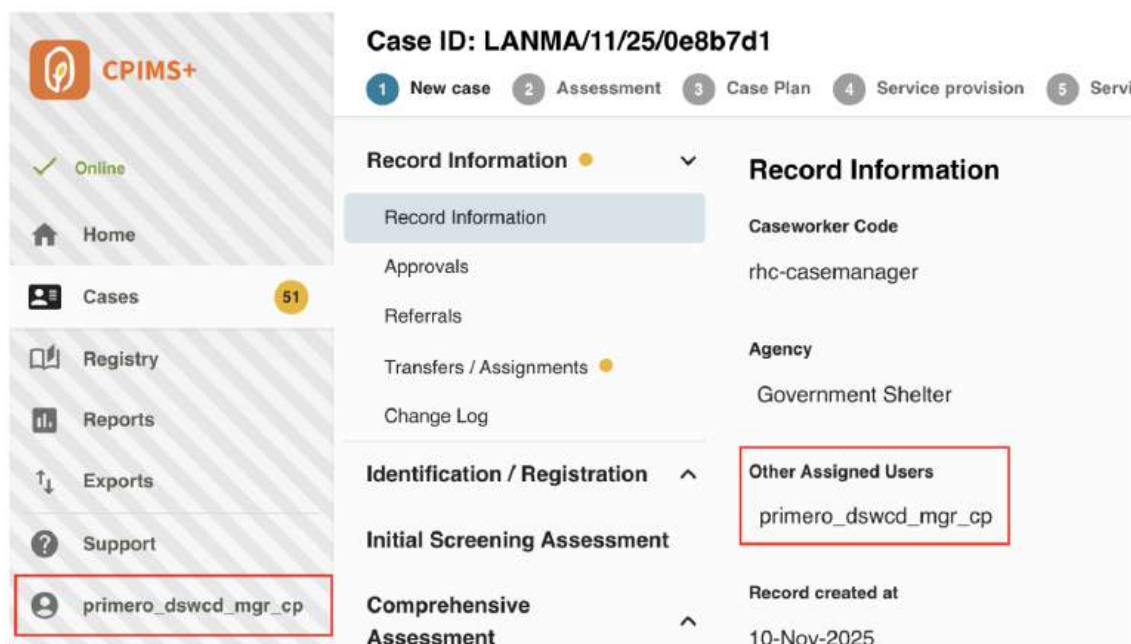


When you enter the case that has been transferred to you, go to the **Record Information** form group and click on the **Transfers / Assignments** form. You will see that the status is ‘Pending’. To accept or reject the case transfer, use the menu button with three dots on the far right.

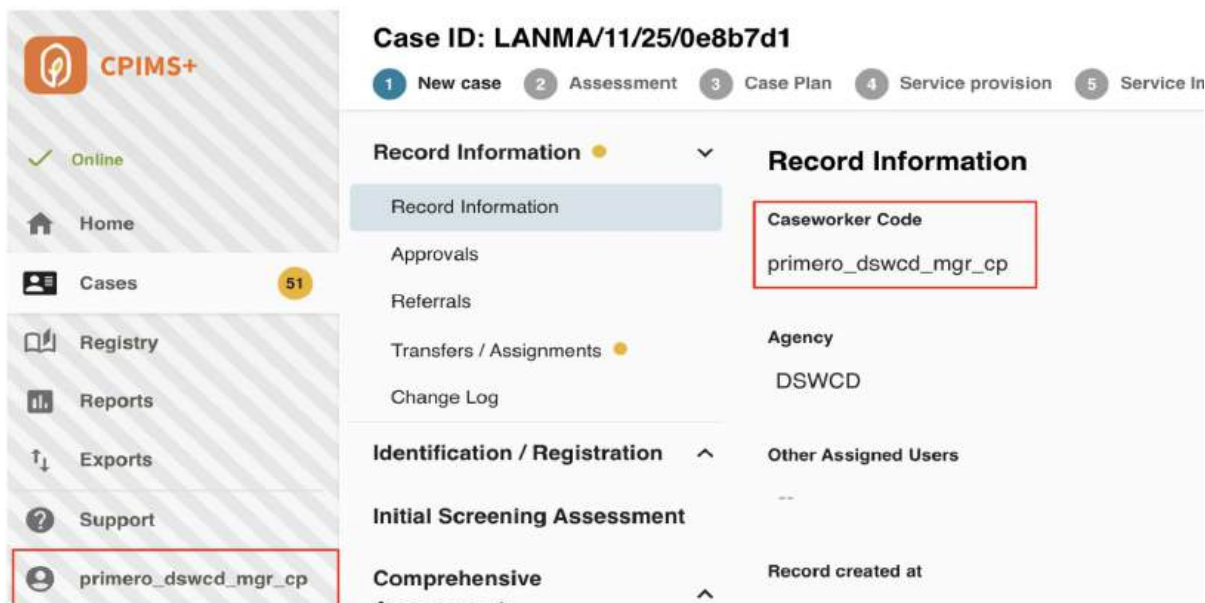


If you click to accept the case, the status will change to accepted, and you will become the case owner, rather than an “Other Assigned User”. The record information is updated with this change (see example below from user account ‘primero_dswcd_mgr_cp’).

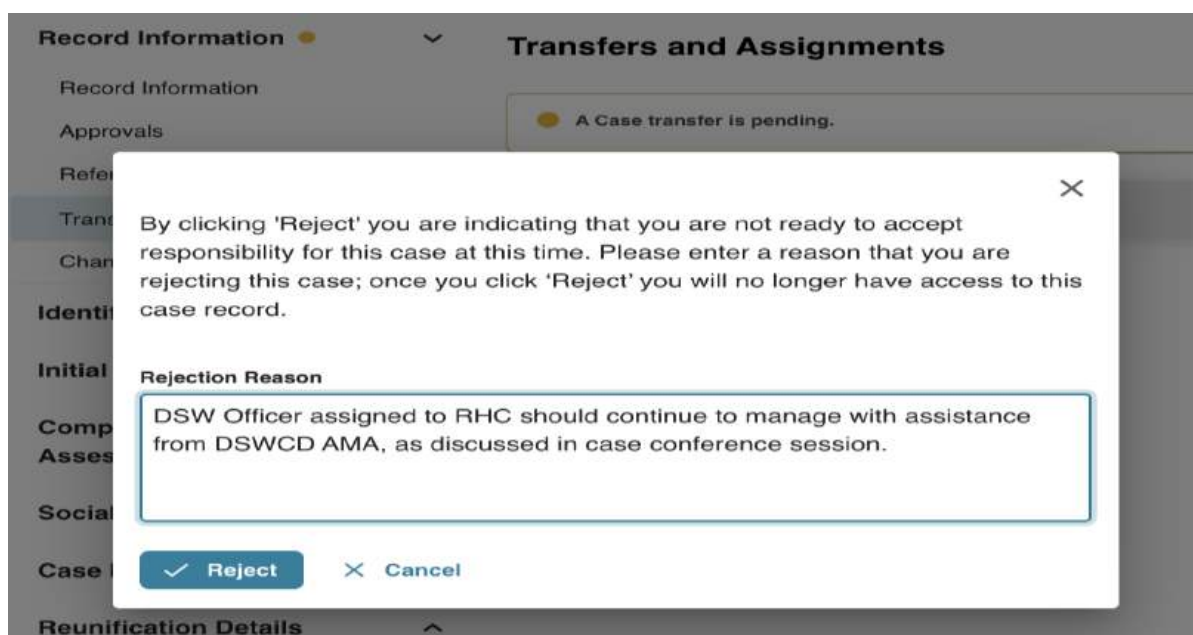
Before accepting the transfer:



After accepting the transfer:



If you click Reject, a modal opens with a text box for entering the Rejection Reason. The rejection reason then appears in the **Transfers / Assignments** form for the Case and the transfer status is changed to 'Rejected.' Once a case has been rejected by you, you will lose access to the case record.



Requesting a Case Transfer

If you find a case owned by another user and require full access to it, you can ask the record owner to transfer the record to you. In SWIMS, this is known as a *Transfer Request*. Your ability to perform a *Transfer Request* will depend on the permissions you have as a SWIMS user. To request a transfer, first search for a case using your client’s name or national ID number using the steps listed under the section ‘Searching for Cases Managed by Others’.

When you identify the case in the search results that is not owned by you, clicking on the case will open the *View Details* modal as can be seen in the figure below.

ID #KEEAMA/02/21/A10DB19

Case Worker Code
keeama-mgr

Agency
DSWCD

Full Name
abena yaa sam
This field will be automatically generated based on the First Name, Middle Name, and Last Name.

Sex * Female **Date of Birth** 01-Jan-2001 **Age *** 16 **Is the age estimated?**

First Name *
abena yaa

At the bottom left of the *View Details* modal, you will see a button marked **Request Transfer**. Click it, and the following modal will appear.

ID #KEEAMA/02/21/A10DB19

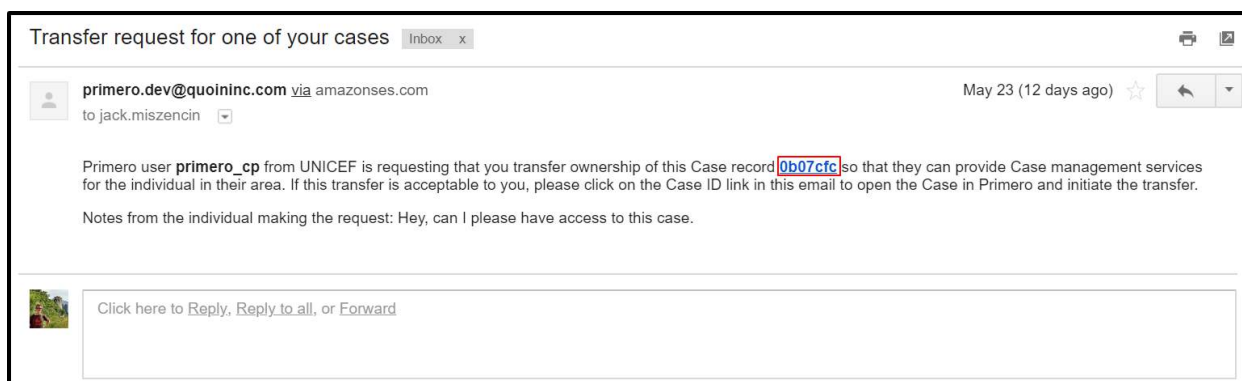
Case Worker Code
keeama-mgr

Agency
--

Notes *
Client shifted to AMA and has approach DSWCD AMA for assistance.

Here, you will see information on the case record owner and a text box where you can enter a note to the owner of the case. Click **Send Request** to submit.

Once you have sent the transfer request, the Case's record owner will receive a notification. In case the owner's user account is configured with an email address and the ability to receive email notifications, they will receive an email notification telling them about your request for the case transfer. If there is no email address configured, they can also accept or reject a transfer request in SWIMS directly.

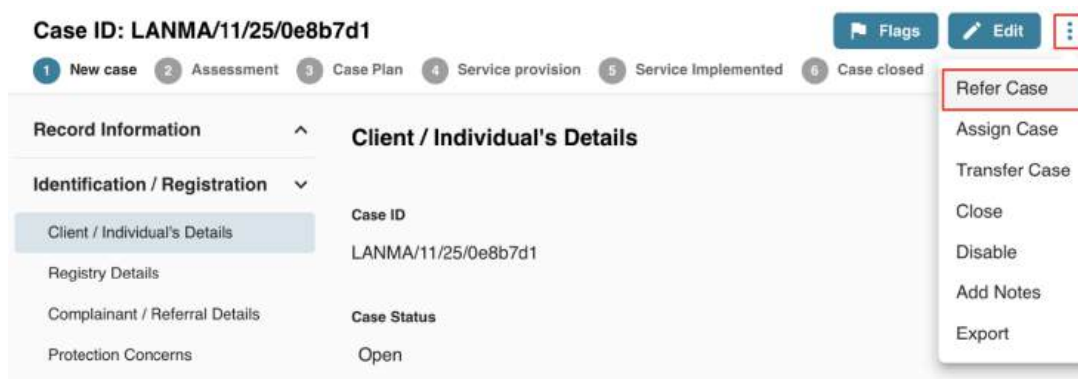


If the Case record owner clicks on the link in the email, they will arrive at the case record in SWIMS. Here they will see an alert in the Form Navigation Menu on the **Transfers / Assignments form**. Here, they can expand the transfer request sub-form to see the details of your request, including any notes you have included. At this point, the case owner can choose whether or not to transfer the record to the SWIMS user who requested the transfer.

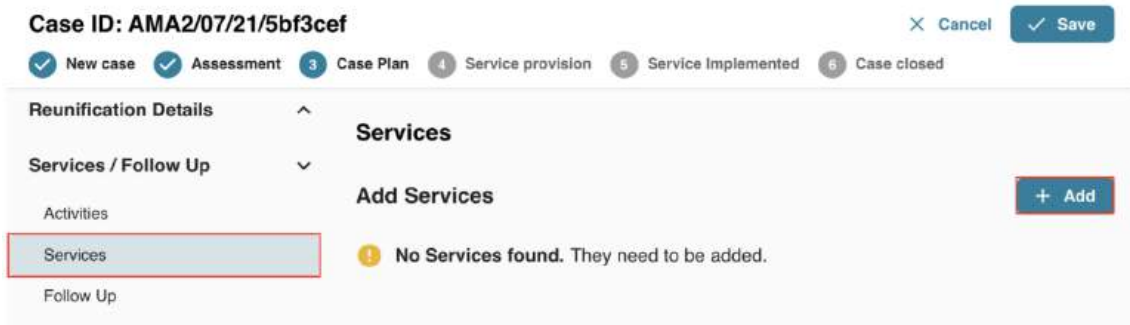
Referrals

Referring a case is a way of giving a user limited access to a case record without transferring it completely. While referring a case allows the recipient to access your case record, you will still maintain full record ownership and will be able to remove the recipient's access at any time. There are two ways to refer a case on SWIMS. Depending on your user role, you may have access to only one or both methods of referral. They are as follows:

1. Referral through Actions Menu - this type of referral is only available to DSWCD Case Managers and other MMDA-level manager roles. To start a referral using this method, click on the **ACTIONS** Menu available in a case record on the top right corner.



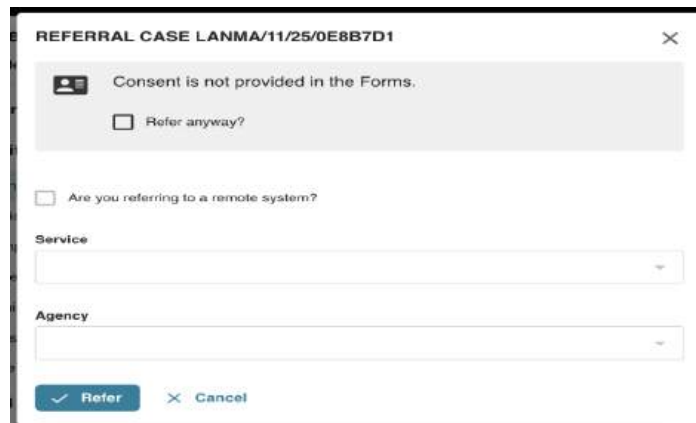
2. Referral through Service sub-form - this can be done by most users at the MMDA-level with access to the Service Provision sub-forms. This type of referral enables partial case access to the recipient, in order to facilitate service provision. To start a referral, you must first click on **EDIT**, followed by **Add** a service using the **Services** sub-form.



Once you have added a service to a case, you will have the option to refer the case for that particular service as can be seen in the figure below.

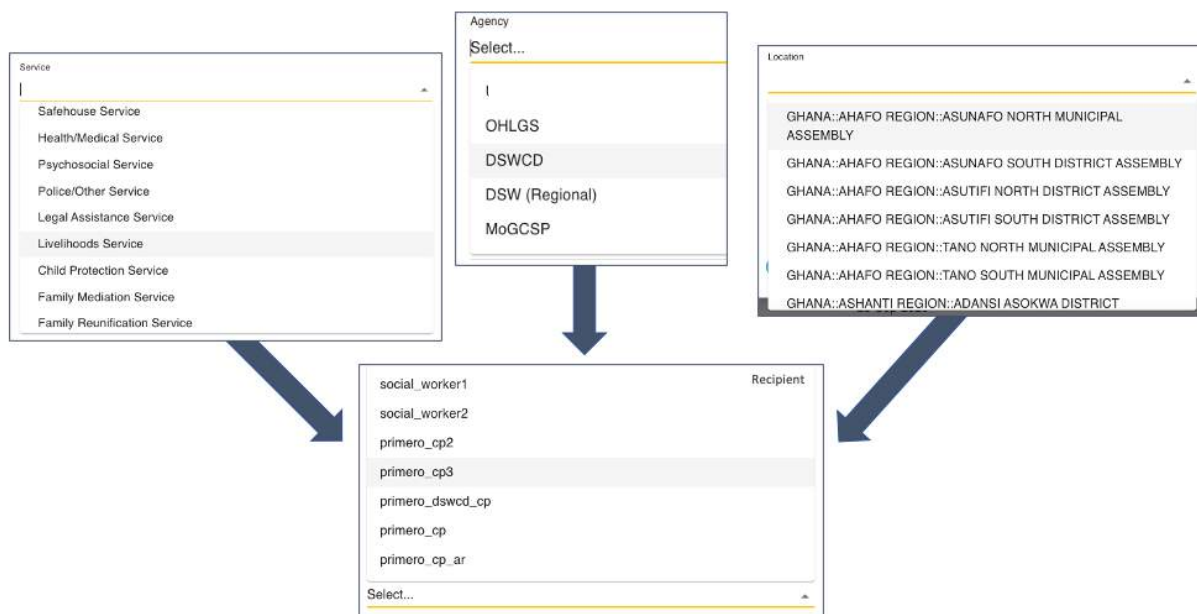


Click on the **REFER** button to view the following modal form, which allows you to select options for your referral. Note that if you have already referred a service, you can refer the service a second time using the **REFER AGAIN** button.



Using both methods (1) and (2), you will arrive at the above Referral Modal. As with case transfers, consent of the individual is required for case referral. Consent for referral is usually recorded in the **Consent** form under the **Identification / Registration** form group. While completing the Services & Referral forms mentioned above, the following fields are important to select the recipient of the referral:

- **Service** you are requesting the other user perform.
- **Agency** you would like to perform the service
- **Location** where you would like the service to take place

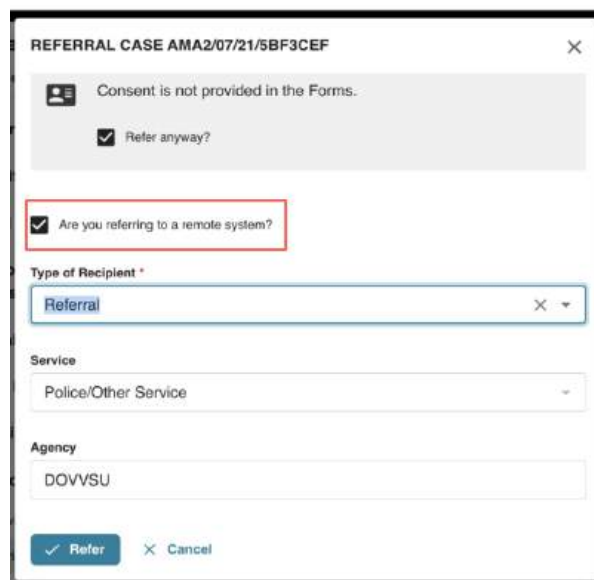


Now, select the “Recipient” who must be a user within your deployment of SWIMS. A list of all users that perform the service selected, from the agency selected, and in the location selected will appear. If the desired recipient is not in the drop-down list, it means this user does not have permission to receive referrals via SWIMS or does not meet one of the three criteria listed above. Note that for the Referral sub-form, these fields may be automatically derived from the corresponding fields on the Services sub-form.

Referring to a Remote System

The "Remote System" option allows you to record a referral to an individual or organization who is not using SWIMS. **This action will generate a PDF export of the referral form, which contains limited information about the Case. You can print this PDF file or send it via email to the referral recipient.** To start this process, select the tick box for "Are you transferring to a remote system?" and manually enter the necessary details regarding the recipient’s agency, service location and service provider name.

Once referral has been completed, a .pdf referral export file will be automatically generated for export and will be available in your device’s Downloads folder, containing the referral form.



Case ID: 5bf3cef
Printed: 22-Dec-2025

Date	22-Dec-2025 17:02
Service	Police/Other Service
Agency	DOVVSU
Location	Berekum West
Recipient	DOVVSU Berekum West
Notes	Kindly provide necessary shelter services until further notice from Family Tribunal.

Revoking a Referral

As a caseworker who manages a case, you can remove a referral recipient's access to your case upon completion of the referral work. To revoke a case you have referred to another user, simply enter the case record and go to the **Referrals** form under the **Record Information** form group. Expand the **Referrals** sub-form for the recipient you wish to remove and click the **REVOKE** action in the referral's action menu.

Case ID: AMA2/07/21/5bf3cef Flags Edit

New case
 Assessment
 Case Plan
 4 Service provision
 5 Service Implemented
 6 Case closed

Record Information

- Record Information
- Approvals
- Referrals**
- Transfers / Assignments
- Change Log

Identification / Registration

Initial Screening Assessment

Referrals

22-Dec-2025 EXTERNAL REFERRAL PENDING

Recipient
DOVVSU Berekum West

Assigned By
primero_dswcd_mgr_cp

Consent to share setting overwritten?
 Yes

Service
Police/Other Service

Agency
DOVVSU

Revoke

Once you have revoked a referral, the service provider will no longer have access to the Case. The referral's status changes from *Pending* to *Revoked* to indicate that the referral has been closed and the recipient no longer has Case access.

Relinquishing a Referral

If you have received a Case referral that you have accepted, you can relinquish the referral and give up access to the Case at any time by marking the referral as **Done**. Go to the case record, click on the **Referrals** form in the *Record Information* form group. Click the **DONE** action in the Actions menu of the appropriate referral.

Record Information

- Record Information
- Approvals
- Referrals**
- Transfers / Assignments
- Change Log

Identification / Registration

Initial Screening Assessment

Comprehensive Assessment

Social Enquiry Report

Referrals

A Case referral is pending.

22-Dec-2025 REFERRAL ACCEPTED

Recipient
primero_dswcd_cp

Assigned By
rhc-casemanager

Consent to share setting overwritten?
 Yes

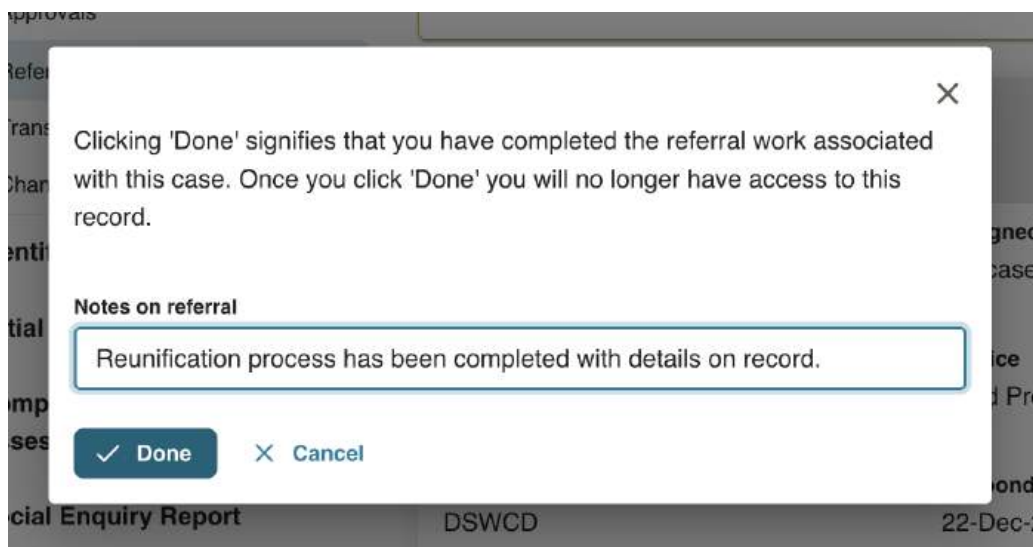
Service
Child Protection Service

Agency
DSWCD

Responded At
22-Dec-2025 17:10

Done

SWIMS will then ask you to confirm your decision in a modal and provide an explanation. Once you have marked the referral as **Done**, the referred Case will be removed from your Case List and you will no longer have access to it.



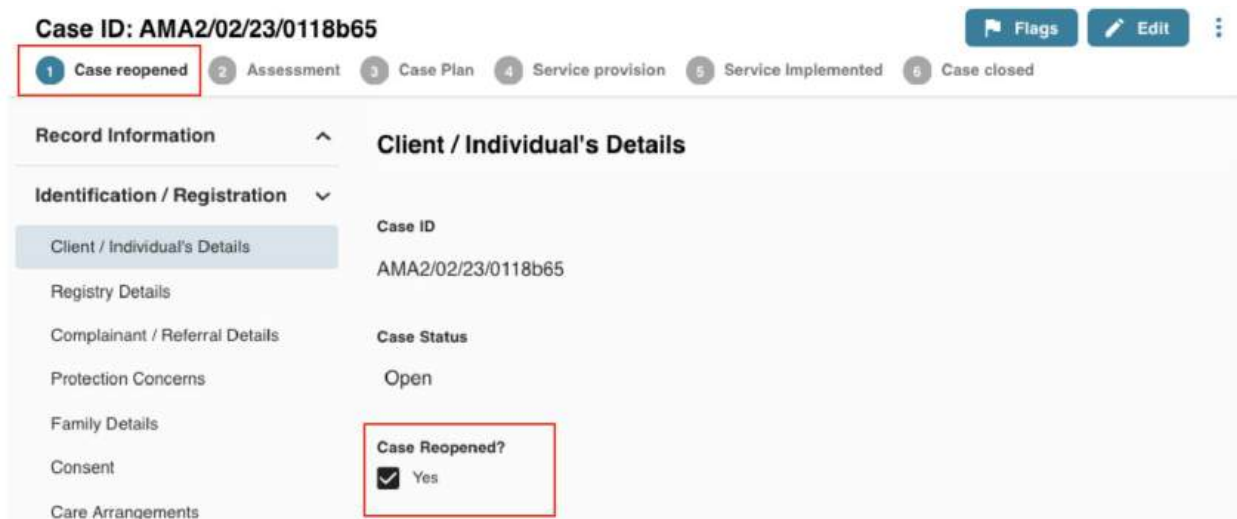
Close / Reopen

The **Close / Reopen** action allows you to change the **Case Status** field for a given case. Only certain users have the ability to perform this action, such as DSWCD caseworkers.

When a Case is open, this action appears as **Close** in the Actions menu. Clicking this action will change the Case Status field to "Closed", and the Workflow Status to "Closed". Prior to closing a case, ensure that the Case Closure form is duly completed and approved by your case manager in line with Case Management SOPs for children in need of care and protection. Note that once a case is closed, it will not appear by default on the Case List page. For information on how to find closed Cases, please see the Filtering section.



When a Case is closed, the action appears as **Reopen** in the Actions menu. By clicking this action will change the Case Status field to "Open" and set the "Case Reopened" field on the Individual Details form, as can be seen in the figure below. It will also set the Case's Workflow Status to "Reopened".



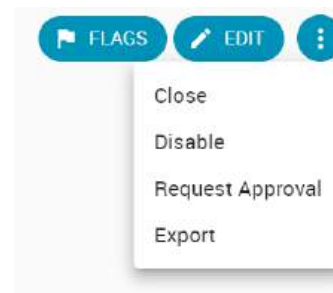
Approvals

Requesting Approval for a Form

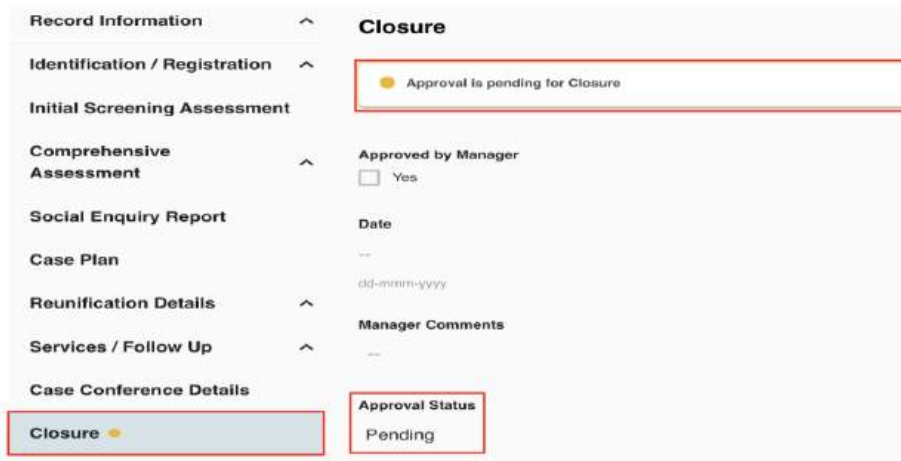
Case workers can request a case manager's approval for the following Case forms:

- Social Enquiry Report
- Case Plan
- Closure

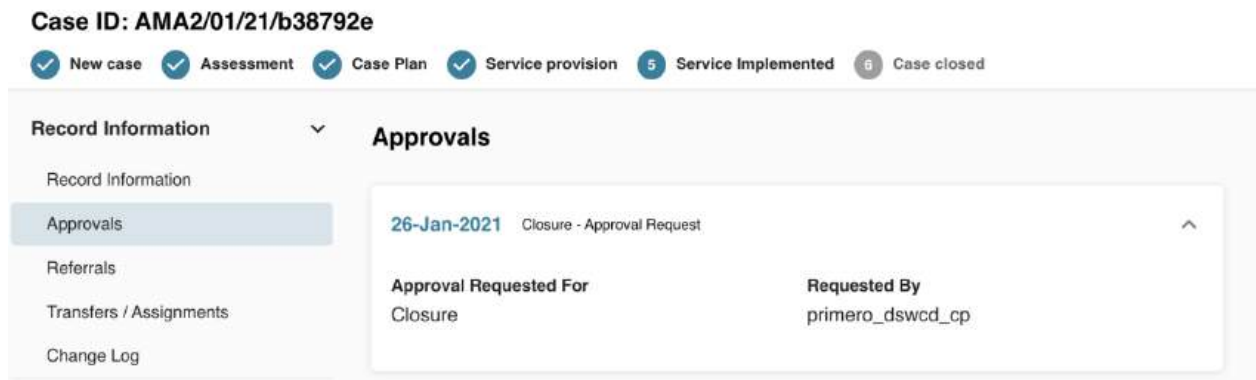
As a caseworker, to request approval for one of these forms, click the **Request Approval** action in the Actions menu for a given case. The below modal will appear. Select the form for which you would like to request approval, then click **OK**. In the example here, the user has selected approval for the Case Plan form.



Once you have requested approval, you will notice that an alert appears on the link to the corresponding form on your Case's Form Navigation Menu. Upon clicking this form, you will note that there is an alert message at the top of the form regarding the pending approval. The **Approval Status** field in this form will also be set to "Pending." This means that you are still waiting for your manager to either approve or reject the form in this case.



Use the **Record Information** section of the Form Navigation Menu to go to the **Approvals** section. Here, you will see a list of all approval requests and approvals made on your Case. The approval request you just submitted should appear here.



Now, go to your dashboard. In the "Approvals" section, your case will now be counted as "Pending" in the column for the form where you requested approval.

Approvals		
21 SER	10 CASE PLAN	3 CLOSURE
11 Pending	10 Pending	3 Pending
2 Rejected	0 Rejected	0 Rejected
8 Approved	0 Approved	0 Approved

Approving or Rejecting a Form

Case managers can choose to accept or reject approval requests made by caseworkers. A case manager can check for pending approvals in the "Approvals" section of their dashboard. The numbers here represent the number of Cases with pending approvals for each approvable form.



Using our previous example, if a case manager clicks on the number for "Case Plan," they will arrive at a list of Cases with pending Case Plan approval requests.

<input type="checkbox"/>	ID#		Age	Sex	Registration Date	Social Worker	Photo
<input type="checkbox"/>	AMA2/01/21/b38792e		14	Male	05-Jan-2021	primero_dswcd_cp	
<input type="checkbox"/>	AMA2/10/20/fb2af7f		21	Female	01-Oct-2020	primero_dswcd_cp	
<input type="checkbox"/>	AMA2/08/20/e980206		19	Male	12-Aug-2020	primero_dswcd_cp	

By clicking into one of these Cases, they can see an alert on the Closure form in the Form Navigation Menu. The manager can then click into the Closure form to read through and decide whether to approve or reject it.

Case ID: AMA2/01/21/b38792e

New case
 Assessment
 Case Plan
 Service provision
 5 Service Implemented
 6 Case closed

Case Plan

Reunification Details ^

Services / Follow Up ^

Case Conference Details

Closure ●

Photos and Audio

Closure

Approval is pending for Closure

Approved by Manager

Yes

Date

--

To approve or reject, the manager clicks the **Approvals** action in the Action Menu.

Case ID: AMA2/01/21/b38792e

New case
 Assessment
 Case Plan
 Service provision
 5 Service Implemented
 6 Case closed

Record Information ^ **Client / Individual's Details**

Identification / Registration v

- Client / Individual's Details
 - Case ID: AMA2/01/21/b38792e
- Registry Details
- Complainant / Referral Details
 - Case Status: Open
- Protection Concerns
- Family Details

Flags Edit

- Refer Case
- Assign Case
- Transfer Case
- Close
- Disable
- Add Notes
- Approvals
- Export

In the modal that appears, the manager can select **Approve** to approve the Case Plan, or **Not Approve** to reject it. Note that the manager can also use the "The form for" dropdown to select a different form to approve. The manager can also leave a comment on their decision, which will appear both on the approved / rejected form and in the Approvals form section of the case record.

Approve Not Approve

Closure

Comments
 Very thorough record. Case is ready for closure. Good work!

Once a manager has approved or rejected the Closure, the "Approval Status" on that form will update to be either "Approved" or "Rejected." The alert will also disappear from the "Closure" form. For both the case worker and the manager, the **Approvals** section of the dashboard will show one less pending Closures approval. In the "Approvals" section of the case worker's dashboard, the number for "Approved" or "Rejected" Closures will have increased by one, depending on how the manager responded.

Case ID: AMA2/01/21/b38792e

New case
 Assessment
 Case Plan
 Service provision
 5 Service Implemented
 6 Case closed

Case Plan

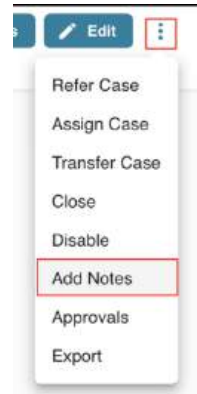
Closure

- Reunification Details ^
 - Approved by Manager
- Services / Follow Up ^
 - Yes

Add Notes

Case managers can add notes to a particular case to provide inputs and guidance on case management. This action is particularly useful for case managers who do not have the ability to edit Cases. If managers do have the ability to edit cases, they can always add a note by editing the case, going to the Notes form, and adding a sub-form entry.

To add a note, in the Actions menu, click the **Add Notes** action. A modal will appear. Here, you can write the subject of your note, as well as its full text. Click **SAVE** to add the note to the case.

A screenshot of a modal window titled 'ADD NOTES'. It has a close button (X) in the top right corner. The form contains two main sections: 'Subject' with a text input field containing 'Need to follow up', and 'Notes' with a larger text area containing 'Caseworker should follow up with the child and check on his household and living conditions.' At the bottom left of the modal is a blue button with a checkmark icon and the text 'Save'.

When the case worker logs in and views this case, an alert will appear on the link for the Notes form in the Form Navigation Menu.

A screenshot of a case management interface. At the top, it says 'Case ID: 09/25/3fda658'. Below this is a progress bar with six steps: 1 New case, 2 Assessment, 3 Case Plan, 4 Service provision, 5 Service Implemented, and 6 Case closed. The main content area is split into two columns. The left column has a sidebar with 'Case Conference Details', 'Closure', 'Photos and Audio', 'Other Documents', and 'Notes' (which is highlighted with a blue background and a yellow dot). The right column has a 'Notes' section with a yellow dot icon and the text 'Notes was updated on 22-Dec-2025'. Below this is another 'Notes' section with a timestamp '22-Dec-2025 17:36'.

If the case worker then clicks on the form, they will be able to see the case manager's note, including the subject, full text, the case manager's username, and the date the note was added. The alert will disappear once the record owner edits the case.

NOTES

Date
22-Dec-2025 17:40
dd-mmm-yyyy hh:mm

Subject
Follow up needed

Notes
Kindly follow up with the child and conduct a visit to assess household and living conditions.

Manager
primero_dswcd_mgr_cp

Services & Follow Up

Caseworkers can plan, document, and refer for services using the **Services** and **Follow Up** sub-forms. The below steps use Services subforms as an example. The same steps are applicable to Follow Up subforms.

Adding Services & Follow Up

To add a service to a Case, go to the **Services** sub-form, and click the **ADD** button.

Case ID: AMA2/07/21/b2d9962

Cancel Save

✓ New case ✓ Assessment 3 Case Plan 4 Service provision 5 Service Implemented 6 Case closed

Reunification Details ^

Services / Follow Up v

Activities

Services

Follow Up

Services

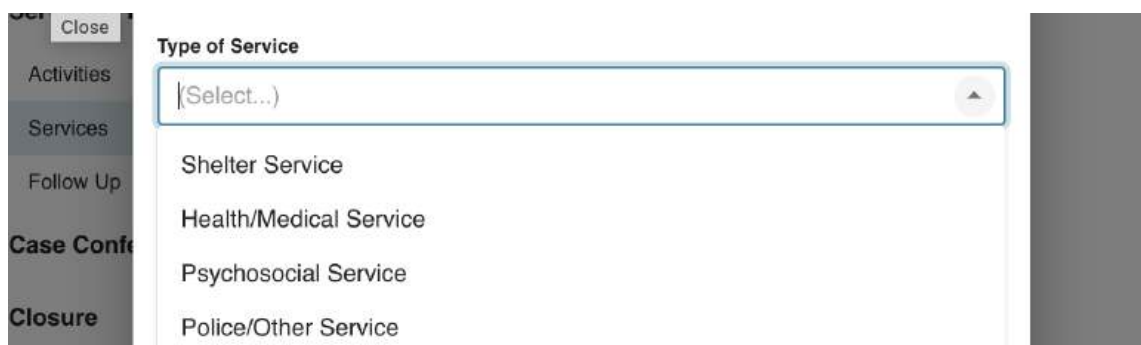
Add Services

+ Add

⚠ No Services found. They need to be added.

A modal will appear. The first two fields on the subform provide information about the type of service you are providing, and in which part of the case management workflow it belongs.

- **Type of Response** - This field is a *general* category for the service and the only option for this field will be "Service Provision". When you add a service to a Case, the Workflow Status is set to be the Response Type of the most-recently-added service. For instance, if a user adds a service with a Response Type of "Service provision" the Workflow Status will be set to "Service Provision."
- **Type of Service** - This is the *specific* type of service being provided (example: "Medical Examination" or "Psychosocial Counseling"). When you enter a value in this field, SWIMS uses it to search for Agencies and Users capable of providing the chosen service type.



- **Setting a Service Due Date** - Each service has a due date, which will appear on your service's Task in the Tasks list page. The below field will determine this:



Referral information (internal) - If another user in SWIMS will be providing this service, fill out the below fields to start the process of referring your Case to that user.

- **Implementing Agency** - The Agency which will be providing the service. The dropdown will only display Agencies which are able to provide the type of service you entered in the **Type of Service** field.
- **Service delivery location** - Location where you would like the service to occur. To find a location in the dropdown, start typing the location's name; SWIMS will update the options to show all locations which match the name you have entered. Selecting a location here will narrow down which Users appear in the **Service Provider Name** field.
- **Service Provider Name** - This the SWIMS User who will perform the service. The options in this dropdown will be all Users who are able to perform the selected **Type of Service**, belong to the selected **Implementing Agency**, and are in the selected **Service delivery location**. When you refer the case for this service, this User will gain temporary access to the Case.

The screenshot shows a vertical sidebar on the left with menu items: 'Services / I', 'activities', 'services', 'Follow Up', 'Case Conf', 'asure', and 'otos and'. The main content area contains three dropdown menus, each with a downward arrow on the right side. The first is labeled 'Implementing Agency' and contains the text '(Select...)'. The second is labeled 'Service delivery location' and also contains '(Select...)'. The third is labeled 'Service provider name' and contains '(Select...)'.

Referral information (external) - If an individual or organization who does not use SWIMS will be providing the service, fill out the below fields.

- **Is this a referral to an external system / user?** - Check this box to indicate that this service will be provided by an individual or organization not using SWIMS. Checking this box also allows you to perform an **External Referral** for this service.
- **Service Provider** - Name of the individual who will provide the service.
- **Implementing Agency** - Agency or organization who will provide the service.
- **Service Location** - Place where the service will be provided.

The screenshot shows a dialog box titled 'SERVICES' with a close button (X) in the top right corner. Below the title is a checkbox labeled 'Is this a referral to an external system / user?' with the text 'Yes' next to it. Underneath is a section titled 'External referral details' followed by three text input fields. The first is labeled 'Service Provider', the second 'Implementing Agency', and the third 'Service Location'.

Marking a service as implemented - The two fields below indicate whether and when the service was implemented.

- **Service implemented** - This field is disabled and the user cannot edit it. Any service saved to a Case gets a value of "Not Implemented" in this field by default. To change this field's value to "Implemented," fill out the "Service Implemented On" field (see below). Once all services on a case are marked as "Implemented," the Case's Workflow Status will update to "Service Implemented". This means this should only be completed after the service has been implemented.

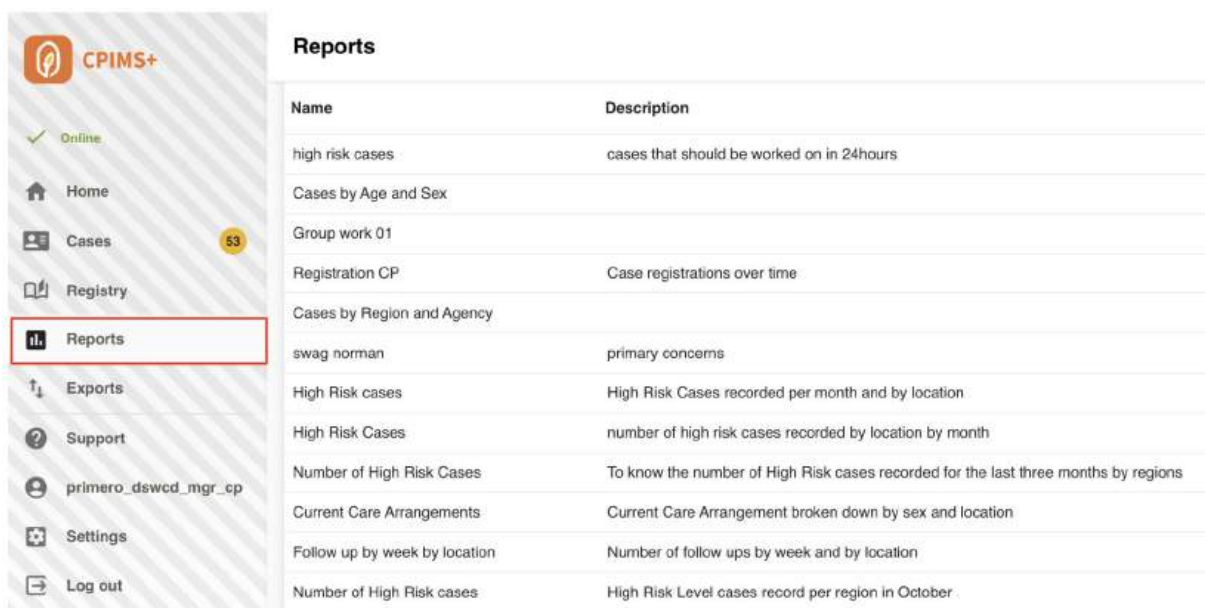
- **Service Implemented On** - When the user fills out a date and time in this field and then saves their Case, the "Service implemented" field (see above) is set to "Implemented."



Referrals through Services sub-form has already been explained under ‘Referrals’ in an earlier section.

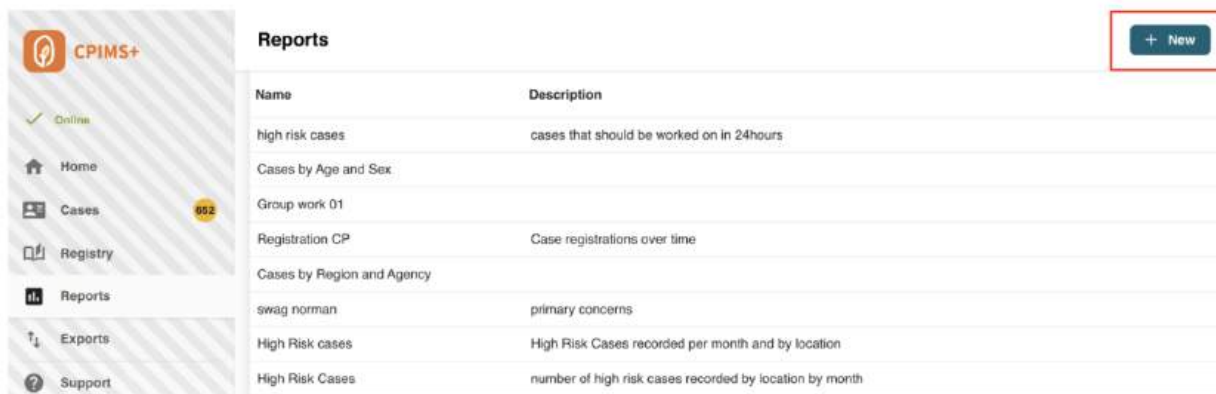
REPORTS

Reports allow users to see a high-level, aggregate view of data, helping them to understand trends and coming challenges in their work. This section is only visible to Administrator and Manager roles in SWIMS. Administrators will be able to navigate to the **Reports** section of the application and view existing reports but not edit them or create new ones, while managers will have the ability to view, create, and edit reports.



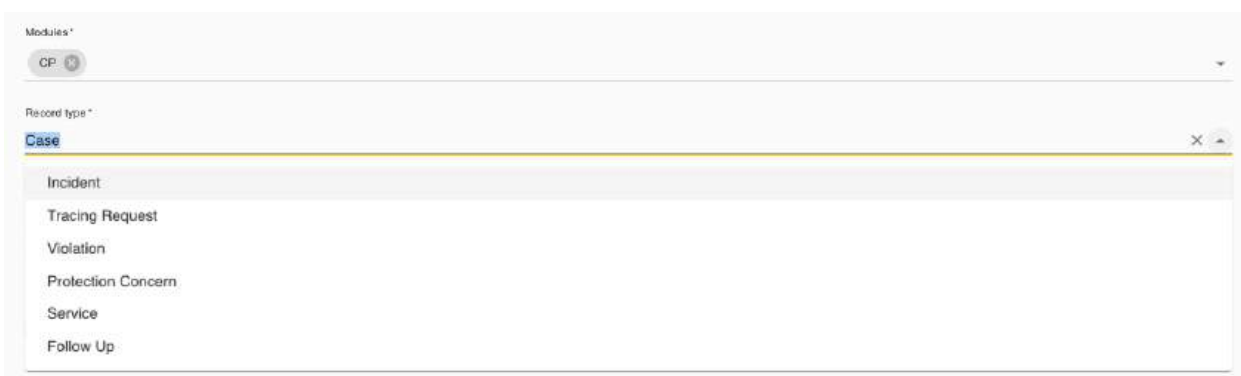
Creating a Report

Note that only National-level roles can create new reports. To create a report, first click on **Reports** in the Navigation Menu. You will see that there are already a number of pre-built reports which you can view at any time. To start your own, click the **NEW** button at the top of the screen.

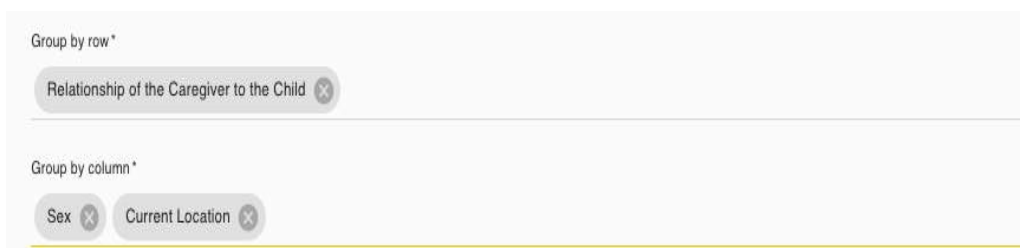


Complete all fields as detailed below, and then click SAVE to generate and view your report. All other SWIMS case managers can only view existing reports.

- **Name and Description:** Type in a title for the report, so you can find it on the Reports List later.
- **Module and Record Type:** Specify the module and type of records you want to draw the records from for your report. For SWIMS, you must select the **CP module** only, whilst either **Case, Service** or **Follow Up** can be selected as record type.



- **Rows and Columns:** Group your data by row and by column by selecting one or multiple fields from a dropdown menu. The options in the menu depend on the type of record and module you selected above. For instance, if you selected Case records, you will only see the fields that would appear on a Case record form, as opposed to an Incident record. It is possible to select more than one attribute per row or column, for further subdivision of data. Then the first item you choose in each field will be the outer grouping layer, with each successive item acting as a sub-categorization.



In the example below, the rows are divided by sex and the columns by marital status.

Group by row *

Sex

Group by column *

Current Civil/Marital Status



	Divorced/Separated	Married/Cohabiting	Single	Widowed	Total
Female	1	2	2	0	30
Male	1	1	3	1	27

- **Age and Date Ranges:** Select the tick boxes for age and date ranges to group these large data sets into a smaller, more manageable set of ranges.

Use age ranges

0-5, 6-11, 12-17, 18+

Use date ranges

The two images below exemplify the usefulness of this feature. The first image shows part of a sprawling report showing every age. The second shows the same report with age ranges enabled.

AGE AND SEX 2

	Female	Male	Total
0	1	0	1
1	1	0	1
2	1	0	1
3	1	2	3



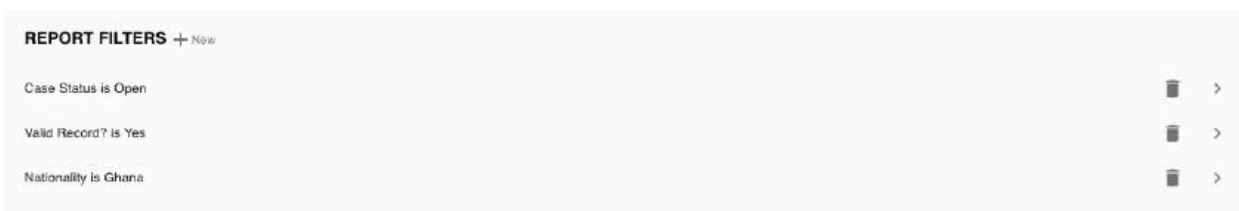
AGE AND SEX 2

	Female	Male	Total
0 - 5	5	5	10
6 - 11	10	7	17
12 - 17	0	0	0
18+	0	0	0

- **Generate a Graph:** Select this tickbox to generate a bar graph of your data in addition to a table report.



- **Filters:** Put filters on the records you are using to eliminate irrelevant data. The two default filters are set to ensure that reports include only "Open" and "Valid" records. You can create a filter on any field, as well as specify which values are acceptable for records being included into the report.



Reporting Do’s and Don’ts

We have built helpful reporting functionality to be flexible for your programming and to enable administrators and coordinators to be able to see aggregate, anonymized data in a safe manner rather than exporting the data from the case lists themselves. Below is guidance to consider when you are making reports.

- Before creating a report, **review your reporting needs** by understanding the type of reports that are needed on a regular basis
- Before creating a report, **understand what you need for a report and make a list** of the variables that you need in your reports and draft how these reports could look in SWIMS. For example, “Protection Concerns”, “Number of completed services” by “Agency”
- **Do** play with the reports and reverse the variables you select by “row” and “column” to see how the table data can be more appropriate for your needs

The screenshot shows two sections for grouping data. The first section, titled "Group by row *", contains a single button labeled "Case Manager's Location" with a close icon (X). The second section, titled "Group by column *", contains a single button labeled "Protection Concerns" with a close icon (X).

- **Do use the filters to apply “dates”** to your reports. For example, if you would like to see the number of registered cases in January, select “Date of Registration” and select the constraint “After” and the value “January 1, 2022” as shown below. Click “Save”. Add another filter for “Date of Registration”, select the constraint “Before” and the value “February 1, 2022”. This will show you all registered cases in the month of January.

The screenshot shows a dialog box titled "NEW REPORT FILTER" with a close icon (X) in the top right corner. It contains three input fields: "Attribute" with the value "Date of Registration", "Constraint" with the value "After", and "Value" with the value "01-Jan-2022". At the bottom, there are two buttons: a blue "Save" button with a checkmark icon and a "Cancel" button with an X icon.

- **Do apply the appropriate filters** to ensure data is displayed based on the child’s consent, if the cases should be “open” or “valid” (valid will not include disabled cases)
- **Do delete reports you do not use**
- **DO NOT export large amounts of child records data from your cases and save them to your computer without trying to create the report first in SWIMS**
- **DO NOT generate a report or export large reports during peak hours of usage** to ensure it does not slow down the system for case workers and managers

Viewing a Report

If you click SAVE on your report, and it saves successfully, you will arrive at the view page for your report. If you did not select the "Generate a graph" tickbox, you will see a data table representing your report. If you specified that your report should generate a graph, you will see the graph followed by the table report.



Note that the columns of your report contain a “Total” column, which shows the aggregate for each row. The numbers in each of your columns may not add up to the number in your total column, since many fields will go undefined by the workers doing registration. For instance, in the example above, there were a total of 30 female cases, but only 5 in which the marital status field was filled out.

If you wish to view only the cases that contain relevant data, you can select EDIT to go back into the case. Then, create a new report filter and select the "Is not blank?" tick box. Once saved again, the report generated with this criteria has a Total column that only calculates based on the completed fields.

NEW REPORT FILTER ✕

Attribute

Current Civil/Marital Status ▼

Is not blank?

✓ SAVE
✕ CANCEL



	Divorced/Separated	Married/Cohabiting	Single	Widowed	Total
Female	1	2	2	0	5
Male	1	1	3	1	6

Note: “Incomplete Data” field values show the number of cases where the field is not filled out on the case.

RESOURCES

Below is a list of resources for SWIMS users including Government and Non-Government users.

1. SWIMS Demo: <https://demo-swims-mogcsp.primero.org/v2/login>
2. SWIMS Production: <https://swims.mogcsp.gov.gh/v2/login>
3. SWIMS Home Page - Ministry of Gender, Children & Social Protection: <https://www.mogcsp.gov.gh/swims/>
4. Case management Standard Operating Procedures of Children in Need of Care and Protection: <https://www.mogcsp.gov.gh/department-of-social-welfare/>
5. Inter-sectoral Standard Operating Procedures for Child Protection and Family Welfare: <https://www.unicef.org/ghana/reports/inter-sectoral-standard-operating-procedures-child-protection-and-family-welfare>
6. Ghana Directory of Social Services: <http://directory.mogcsp.gov.gh/>
7. Primero Support Hub: <https://support.primero.org/>

SUPPORT INFORMATION

For support on user setup, password change, system issues, contact the National System Administrators at Directorate RSIM, MoGCSP for support:

- swims.ghana@mogcsp.gov.gh
- info.swims@mogcsp.gov.gh

For support on how to use the Case Management, Family Reunification and Alternative Care components, contact the Department of Social Welfare HQ, MoGCSP:

- dsw.swims@mogcsp.gov.gh



Primero



USAID
FROM THE AMERICAN PEOPLE

unicef 
for every child