



Home Office

How to record decisions, case notes and passport notes

Version 16.0

This guidance tells His Majesty's Passport Office staff about the importance of reading and recording permanent records of information, such as case notes and passport notes

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About: How to record decisions, case notes and passport notes

This guidance tells His Majesty's Passport Office staff about the importance of reading and recording information and why recording a permanent record is an important part of the passport application process.

It explains the different types of case notes and passport notes found in applications and passport records and who can read and record them.

Contacts

If you have any questions about the guidance and your line manager or senior caseworker cannot help you or you think the guidance has factual errors, then email Guidance & Quality, Operating Standards.

If you notice any formatting errors in this guidance (broken links, spelling mistakes and so on) or have any comments about the layout or navigability of the guidance then you can email Guidance & Quality, Operating Standards.

Publication

Below is information on when this version of the guidance was published:

- version **16.0**
- published for Home Office staff **27 September 2022**

Changes from last version of this guidance

This guidance has been updated to reflect the change in our sovereign from Her Majesty Queen Elizabeth II to His Majesty King Charles III.

Related content

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How to read and record permanent records of information

This section tells HM Passport Office staff who can access or ask for information held on our permanent records. The section explains the difference between a case note, passport note and radio button and tells examiners what they can and cannot record as a permanent record.

Under the General Data Protection Regulations 2018 [GDPR 2018](#) (and as part of the Freedom of Information Act 2000), a customer can ask for information about their passport application and passport record by submitting a subject access request.

We hold all permanent records on Main Index (MI). MI is a database of information stored on the passport application system.

You must not disclose information to third parties if they are not entitled to the information.

Differences between case notes, passport notes, and radio buttons

Case notes and passport notes are free text notes [recorded by staff across HM Passport Office](#).

Radio buttons are used on DAP (Digital Application Processing), and allow the staff member processing an application, to record their decision by selecting a predefined option, from a set of options.

Case notes, passport notes and radio button selections are recorded as permanent records on AMS (Application Management System) and DAP.

You can only add a case note to a live application and before the completion of the tasks and activities that result in:

- issuing a passport
- withdrawing an application
- refusing an application

You must add a passport note, if we have already issued the customer a passport and created a passport record for them on MI.

Who can read and record decisions, case notes and passport notes

Most staff can view case notes and passport notes, if they use an internal application processing system, such as AMS or DAP. Records are mainly recorded and viewed, by:

- you (the examiner)
- operational team leaders (OTL)
- Quality Examination Support team (QuESt)
- higher executive officers (HEO)
- Teleperformance agents (TP)
- the Customer Service Liaison team (CSLT)
- the Customer Service Management team (CSMT)
- the Lost, Stolen and Recovered (LSR) team
- interview officers
- counter fraud team (CFT)

Other government organisations, outside of HM Passport Office (for example, some Foreign and Commonwealth Office staff and UK Border Force) will be able to see case notes and passport notes (if they have access to our internal systems).

It is important to remember that passport notes can also (externally from our systems using a browser) be viewed by Data Validation Application (DVA) users in the public sector.

You must keep in mind that someone else may read the information you have recorded on a passport application or record.

If the information you record relates to the customer's passport application, you must use a radio button and case note. If the information you record relates to a customer's passport record you must use a passport note.

You must carefully read your case note and passport note, before you submit the information as a record, to make sure what you have recorded is easy to understand (to you and other readers). Your information must be:

- factually correct
- brief but clear, to the point but detailed enough to allow someone (after the event) to clearly understand what has happened and what may need to happen in the future
- non-judgemental (not based on personal opinions or feelings)
- relevant (to include only the actions, considerations, decisions, and outcomes that are connected to the issue of the passport or the future issue of a passport)

What information you must record when using a radio button

You must use radio buttons on DAP to record decisions you have made, and the outcomes connected to the issue of a passport during the examination process.

When you select some radio buttons, DAP will tell you to add a mandatory case note. You may also need to add an optional free text case note to record your decisions, actions and the outcome of those actions (for example, the outcome of a manual check).

What information you must record on a case note

A case note must be a record, that:

- explains the actions you have taken, decisions you have made, and the outcomes connected to the issue of a passport during the examination process
- describes how you reached the decision to issue a passport and the reasons for the steps you have taken

What information you must record on a passport note

A passport note must be a record of information, actions, decisions, and outcomes that will affect how we deal with customers:

- after we issue them a passport
- when dealing with a future application (see: [Why we record information on closed applications](#))

What information you must not record

Your case note or passport note must not include:

- offensive language
- text speak
- emojis (for example, smiley faces)
- slang or local dialect
- bank, credit or debit card details
- information not related to the customer
- abbreviations not on the agreed HM Passport Office abbreviations list
- the results of third party checks (for example, from other government departments obtained under the Identity Documents Act 2010)

Related content

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Why you must read and record decisions, case and passport notes

This section tells HM Passport Office staff why it is important to read and record your decisions, case and passport notes and how to create a case or passport note on a live or closed application. It includes, how mandatory, manual and automatic case notes are created.

When you (the examiner) deal with an application, it is important that you record information relevant not only to the decisions you made but to the possible outcome of future applications. Before you make a decision on an application you must read the information already available which may have been added manually or automatically by the system in a case note or passport note. You must always:

- record your actions, decisions and outcomes when examining a passport application or adding information to a passport record
- record information that relates to future applications
- read all information added (both manually and automatically) as a case note or passport note

The differences between actions, decisions and outcomes

You must record the actions, decisions and outcomes you take when you deal with a passport application.

Actions

Actions are something that you do (for example, having a telephone conversation with a customer).

Decisions

Decisions are when you accept or decline something. For example, if you decide to accept a document as evidence of identity or you decide a customer has no claim to a British passport.

Outcomes

Outcomes are the end results of your decision making (for example, if you issue or refuse to issue a passport).

How to record decisions, case notes and passport notes

We provide detailed information in each guidance topic to show when you must select a radio button, or add a case note or passport note. You must use the

guidance that is relevant, to make sure you record actions and decisions, and case note and passport note correctly.

You must make sure your case notes and passport notes give a correct explanation of the actions and decisions you have made during your examination of the passport application.

Your case note must also give clear instructions to make it easier for others to act. For example, if a Teleperformance (TP) agent gets a phone call from a customer, TP needs to be able to understand your case notes so they can give the customer the correct advice.

If you make a decision to refer a passport application to another area, you must clearly case note your referral reason. You must also include the actions you have taken that resulted in your referral recommendation.

Your case notes and passport notes (in line with current guidance) are a record of evidence to:

- support your decision making on current passport applications
- to potentially help any decision making on future passport applications

For example, on applications where you need to consider:

- nationality
- identity
- entitlement
- safeguarding (protecting)
- parental responsibility
- gender recognition
- children in care
- multiple passport holders
- court orders
- vulnerable people
- permanent or temporary disabilities
- judicial reviews
- ombudsman questions
- multiple lost passports
- resolving watchlist matches
- observations in passports

How to record actions and decisions on a paper form

If you record actions, decisions or outcomes on a paper form (for example, a proforma) you must create a permanent record. You must decide if you can:

- record the information as a case note
- scan the document and add a case note to show you have scanned it

Why we record information on closed applications

We record information, actions, decisions and outcomes in passport notes for all closed applications, because:

- the system does not allow us to add a case note if the application had been purged (removed)
- there is no other place we can record the information on the system

How to avoid missing important information held on record

To avoid missing important information, you must be aware the system does not automatically provide a warning to alert you of a passport note when you deal with a renewal, replacement or change application.

To avoid the risk of missing important information on future applications, you must always:

- use case notes and passport notes, whether or not the information is relevant to the actions, decisions and outcome of the customer's future passport application (see: How to record [passport notes manually](#))

When the system records passport notes automatically

The passport issuing system will automatically add a passport note to the record on Main Index (MI):

- when we cancel an old passport and replace or renew it
- when we reissue a passport with an associated lost and stolen record
- to give details of a track and trace reference number
- when we issue a diplomatic and official service passport

How to record manual case notes

Recording a manual case note is an important part of the examination process, as it is evidence of the actions and decisions you have taken before making a final decision to issue, withdraw or refuse a passport application.

Your username will appear in the case note history screen (on the Application Management System (AMS) or your name on the timeline (on Digital Application Processing (DAP)) to confirm you recorded the case note.

You must use radio buttons on DAP, and case note, when you:

- attempt to contact a customer or third party
- successfully make contact with the customer or third party
- receive information from a customer or third party

You must also fully record your actions and decisions using radio buttons on DAP and case notes on DAP and AMS, when you are confirming:

- the customer's identity
- the customer's nationality and the act used
- the customer's entitlement
- parental consent

You must also record using radio buttons and case notes:

- all actions taken (and not taken) by you, to support your decision making
- all recommendations and referrals you make
- individual system checks and searches you have done and the results
- individual matches you have investigated (and cleared) and the results
- individual warnings you have investigated (and cleared) and the results
- any updates or documents you get from a customer and what you did as a result of the update, for example if you received new photos and sent them to be scanned
- when you have reviewed correspondence sent by the customer, to confirm the information or request and the action you have taken
- any foreign passports (or identity documents) received, confirming the:
 - passport holder
 - passport number
 - country of issue
- any updates you get from a countersignatory or digital referee
- any document checks against those stored on Knowledge Base
- any additional supporting documents you have received
- what supporting documents you return to a customer (at their request) before you issue them a passport
- information in passport notes on previous passport applications

How to record manual case notes after application completion

If you are processing on AMS, the application record remains on the Consolidated View Database for twenty eight days. You can case notes within this twenty eight day time period.

The database is a store of all application records that are:

- current
- still being processed
- showing as in a dormant state in AMS (Application Management System) but not yet purged from the system

If you are processing on DAP, you can view the application record for twenty eight days, but you cannot add a case note (see adding a case note after an application is completed).

The application processing system (DAP and AMS) automatically moves the passport application twenty eight days after you record your final decision, to MI. MI keeps the information you have case noted permanently on the application. You cannot:

- see the warnings or matches that originally appeared on the application when it was live, if it was processed on AMS
- add a case note to the application
- add a case note to MI

If (after twenty eight days on AMS, or after the application is completed on DAP) you receive information that relates to the passport or that may impact on the final decision you made, you will need to record it as a passport note on the passport record on MI.

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Case notes created by AMS and by AMS users

This section tells HM Passport Office staff about the different types of case notes used on AMS (Application Management System) and the importance of reading and recording them. It tells you how case notes are added on AMS, and about AMS alerts, icase notes, and bring ups.

The Application Management System (AMS) will record some case notes automatically. An automatic case note is when AMS creates a case note on the application record, due to an action you have taken.

Other examples of automated case notes, are:

- revalidating a photo
- examiner returns for replacement forms, fees and photos to Sopra Steria Ltd
- passports that cannot be found on MI
- creating a telephone enquiry bureau (TEB) record

Your username will show in the case note history screen, next to your case note to identify the action you have taken to generate the automatic case note.

All mandatory enforced case notes will appear in the case note history screen with your username and the status title 'mandatory'.

All automated case notes will appear in the case note history screen with a system generated number (for example, SYS36 or SYS52). The status title will show either 'mandatory' or 'case note'.

Mandatory enforced case notes

If you need to investigate mandatory checks on AMS (for example, to clear a system match or a warning) a mandatory case note dialogue box will appear in the middle of your examination screen and stay there, until you type the action you have taken and the results.

You need to:

1. Press 'OK' to save your case note.
2. Your username will appear in the case note history screen to confirm that you created the case note.
3. If you do not add a mandatory case note in the dialogue box, you will not be able to clear the warning or match on AMS.

Your case note must give clear information about:

- the individual searches you have done for every warning
- the match you've investigated
- why you've decided to clear or refer the match for more investigation

Why you need to check alerts

You must read all alerts that have been added to the customer's application on AMS and record the actions you have taken.

HM Passport Office staff and Teleperformance agents add alerts to a passport application to highlight to the examiner, that:

- we have received new information
- immediate action is needed
- another office has received extra information or a new form
- the customer has requested a call back

The system records alerts, as permanent case notes on the application. When you create an alert, you must apply the guidance [about recording and reading permanent records of information](#).

How to create a new alert

To create a new alert on AMS, you must:

1. Go to the 'Links' menu.
2. Click on 'Case Notes'.
3. Click on 'New Alert'.
4. Add your information in the pop-up box.
5. Enter the date you want the alert to be actioned.
6. Select 'submit'.

After you have added an alert:

1. It will appear as a dialogue box in the centre of the examination screen.
 - if you select 'OK' on the alert dialogue box, it will close the alert temporarily
2. The alert will appear in the middle of the examination screen, every time you look at the application on the system, until you decide to delete it.

How to delete an alert

To delete an alert on AMS (after you have dealt with the query), you must:

1. Open the passport application on the system.
2. Click 'Delete' when the alert dialogue box opens.
3. Delete all alerts before making a final examination decision.

The alert will show as a permanent record, in the case note history screen as an 'Alert' case type. The case note history screen will show:

- 'No' for alerts that are still active
- 'Yes' for alerts that have been deleted

Case notes

Interview officers will see all case notes you've recorded on AMS and use them to help with identity interviews. There is no need to repeat case noted information in an case note.

The interview officer will record the outcome of the identity interview as a case note and save it in the case note history screen.

Bring-ups

A bring-up is an electronic filing system, stored in AMS. It automatically pauses the examination time of the application for 2 weeks while you wait for more information from the customer or third parties (for example countersignatories and digital referees).

You must add a bring-up, when you have completed examination of the application as far as you can, making sure you have:

- completed all the required searches and checks
- investigated and cleared where possible all relevant warnings and matches

The bring up note is recorded as a permanent record in the case history screen.

You must:

- click on the bring-up link in the application screen
- record the following in the bring-up dialogue box:
 - why you are filing the application in the electronic holding area (for example, what information you have asked for)
 - how you asked for it (for example via letter, phone call or email)
 - why you need it, for example, 'new photos required as originals are not recent'
 - any relevant advice regarding a decision on the next action, for example, 'if new photos are acceptable the application can be passed for issue'
- adjust the date on the bring-up dialogue box (if you need to take action earlier or later than the 2 week default date provided by the system)
- follow guidance about [recording and reading permanent records of information](#), when you create a bring-up

How case notes generated by DAP appear on AMS

DAP will add automatic case notes, if it cannot deal with an application and transfers it to AMS.

DAP will also automatically add the DAP examiner's case notes to the case note field on the AMS application if the application transfers to AMS.

You can identify a DAP case note on an AMS application, as it shows:

- the date and time it was created
- it was submitted online
- what task or question was asked and the DAP examiner's response

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Case notes created by Digital Customer Service on AMS

This section tells HM Passport Office staff about the different types of case notes used on Digital Customer Service (DCS) applications on AMS (Application Management System) and the importance of reading and recording them. It tells you (the examiner) when to add a manual examiner case note, what a DCS customer (or digital referee) generated case note is and how to identify who entered the information.

When examining digital applications on AMS (Application Management System), you must read all DCS case notes and additional information. The system will not always prompt a mandatory case note dialogue box for all the actions you must take.

You must make sure you read and consider the data the customer (and the digital referee) have provided, as this forms part of the application.

How to record manual case notes on DCS applications

If a customer has recorded information in the 'additional information section' on the Application Management System (AMS) that impacts on current (or future) applications, you must:

- copy this information in full
- add it in a case note on AMS

You must manually record a case note to confirm you have read:

- every customer or digital referee generated case note
- any DCS additional information

Your case note must explain the actions you have (or have not) taken (for example, 'additional information read, no further action needed').

DCS free text case notes and additional information

Digital Customer Service (DCS) will allow the customer (and digital referee) to type some of their answers on the online application, using free text. DCS records the information as case notes or in the additional information section of the application on AMS.

DCS case notes are called 'additional notes' on AMS. You can view them by clicking on the 'case notes' tab on AMS. DCS case notes have a maximum of 2000 characters. The DCS 'additional notes' will show who supplied the information, by starting the case note with the words:

- 'customer supplied data'
- 'digital referee supplied data'

DCS automatic case notes

DCS will automatically add case notes to the customer's application, based on information they (and their digital referee) provide. For example, if a customer has changed their name, DCS will give a list of reasons for the name change and record the option the customer chooses as a case note.

If the information the customer gives is longer than the character allowance for that piece of information, DCS will also add a case note (or additional information) to the application (for example, if the customer's full email address is longer than 40 characters or their parent's full name is longer than 30 characters).

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Case notes created by DAP and by DAP users

This section tells HM Passport Office staff about the different types of case notes used on DAP (Digital Application Processing) and the importance of reading and recording them. It tells you how case notes are added on DAP, when to add a case note, how DAP displays case notes to the user, and how and when to add new case notes on DAP (updating or replacing existing text).

You must record your decisions on DAP (Digital Application Processing) tasks using standardised options (radio buttons). For example, you, the DAP examiner, can select one of the radio buttons within the task to record your decision for the outcome of the task. You will be shown an optional or mandatory free text case note box, depending on the task and decision. You only need to add a free text case note if you need to record:

- actions you took to make the decision
- other relevant information about the decision (for example, why you are clearing a task, or referring for investigation)

The decision you select using the radio button and your case note (if you added one) will be stored and visible on the [DAP timeline](#).

You must create a manual case note when you are processing applications on DAP:

- by entering them using free text
- during a quality review check if you are the operational team leader (OTL)

Your case note can be a maximum of 2000 characters.

When you must add a case note on DAP

When you use DAP, you must always case note:

- the actions you have taken (unless DAP has recorded these automatically, for example the Main Index or watchlist checks you complete)
- the decisions you have made (unless this is fully recorded by selecting a radio button)
- any outcomes that have occurred or will occur as a result of your decision making
- any other information that might affect how we deal with the customer:
 - during an interview
 - after we issue them a passport
 - when dealing with a future application

You must always add a case note on DAP, whenever guidance related to the task you are doing tells you to and in line with the instructions within this guidance.

You can add a case note about any action, decision or outcome in any available case note field on DAP. You must try to add your case note in a task related to the note you are adding, but sometimes this may not be possible (for example, because there is no associated task).

For example, the customer may provide information after they sent their application, or you may receive a document that does not have an associated task. You must case note your action and decision in a case note field on another task.

How to add a new case note on DAP

To add a new free text case note on DAP, you, the OTL or examiner, must:

1. Select the free text case note field you want to update
2. Record your new case note and if you are changing a task decision include your reason for changing the original decision.
3. Select the submit button.

DAP: adding a new case note to a previously populated field

Digital Application Processing (DAP) allows you, the DAP user, to add a new case note to the contents of a previously populated free text case note field. For example, you may need to alter a previous task decision or add extra information to an existing case note.

When you re-open a task on a live application you will see the free text case note field already contains text, if any was added by the DAP user who previously completed the task. DAP allows you to add a new case note if you need to. DAP records the decision and case note added by each examiner (or other DAP user) as a permanent record on DAP and Main Index (MI).

You, the DAP examiner or OTL, must add a new case note in a previously populated free text case note field if you are:

- completing a quality assurance check on a case and amending or correcting:
 - the case note
 - the decision
- changing a decision on a previously completed task
- adding extra information or correcting a case note on a previously completed task and not changing the decision

The 'add a new case note' function in DAP allows HM Passport Office to make sure we record the final action taken on a task accurately. It will help us handle any future audit or query that requires a full case history, for example, complaints handling, responding to MP questions or responding to judicial reviews.

DAP: adding a case note after an application is completed

You cannot add a case note on DAP after an application is completed.

If you need to add a note to a completed application application that has been processed on DAP, you must add this as a passport note on MI (using the Application Management System (AMS)).

If the MI record has not been created (because the passport is not yet printed you must:

1. Create a sticky note recording the application reference number and the note you intend to add.
2. Check MI (on AMS) 24 hours after the application was completed and find the passport record.
3. Copy and paste your note into passport notes.

If you work on DAP and do not have access to AMS, you must:

1. Identify a colleague who has access to AMS (for example, your OTL, QuEST colleague or buddy).
2. Email your colleague with the application reference number, the customer's surname, and the passport note you want adding.

You, the person with AMS access, must:

1. Check MI (on AMS) 24 hours after the application was completed and find the passport record.
2. Copy and paste the note into passport notes.
3. Tell the person who made the request the passport note has been added.

You must delete the sticky note as soon as the passport note is added.

How DAP displays decisions and case notes

DAP keeps an audit trail of all activities and decisions made during the processing of a passport application and it automatically stores:

- all original task outcomes and any case notes created as part of that task
- any updated task outcome (even if it is the same outcome) and any new case notes created

You can view outcomes, decision and case notes DAP or DAP users have added by:

- viewing the decision in the timeline (for example, the radio button that the DAP user selected)
- viewing the case note in the timeline (if a case note was added)
- viewing the decision within the task
- viewing the case note within the task (if a case note was added)

- viewing the MI record [when the application reaches a final state](#)

Viewing case notes on a live DAP application

While the application is in progress, you will see:

- the most recent case note for each task within the task itself, and on the timeline
- previous case notes on the timeline, if the examiner or OTL has added a new case note

If you change a task decision or add a new case note, the timeline will show this by recording 'decision changed'. The timeline will:

- show the task decision and
- the case note text

DAP will update the timeline even when the task decision remains the same and you have only added a new case note.

Who can view case notes on the DAP timeline

The role of the DAP user will determine which case notes the user can see on the timeline.

Case notes on the DAP timeline will be visible to:

- examiners
- customer service office managers and customer service officers who deal with passport interviews
- OTLs
- counter fraud staff (investigators)
- Customer Service Management team (CSMT)

Task decisions and case notes made by counter fraud staff (investigators) can only be seen in the timeline by counter fraud staff.

Teleperformance staff cannot see free text case notes on the timeline.

Viewing case notes on a completed DAP application

DAP will record all decisions made by radio button and any associated case notes when the application is complete, and adds it to MI. This includes the previous and new case notes if these have been updated for a task. An application reaches a completed state when we issue a passport or withdraw the application.

You can view the decisions and case notes on a completed DAP application:

- on the DAP timeline, for 28 days after completion

- by viewing the application record on MI on AMS

Viewing the timeline on a completed DAP application

You can view the timeline on a DAP application up to 28 days after the application is complete. After 28 days, you can request a copy of the information in the DAP timeline. See Searches and checks – passport and application records.

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How to delete a manual case note or passport note

This section tells HM Passport Office staff when and how to delete a case note or passport note on AMS (Application Management System) or DAP (Digital Application Processing).

Case notes or passport notes can only be deleted in special cases. The security team will decide if they must delete a case note or passport note. For example, if it includes:

- bank or credit card details
- personal information added to the wrong application or passport record
- information we must not include (in line with this guidance)
- information we must not keep, as it will result in breaking the law

How to ask for a case note or passport note deletion

If you find a case note or passport note on AMS (Application Management System) or DAP (Digital Application Processing) you believe we must delete, you must:

1. Email the details to your line manager. Your email must include:
 - the application or passport number
 - the date and time of the note
 - the exact words that must be deleted from the note
 - the exact words that we must keep
 - why you need the correction
2. Continue with the application, if it's a live application.
 - you must not delay the application by waiting for the case note to be corrected or deleted
3. Your line manager must forward the email to an operational higher executive officer (HEO) for their approval.
4. The HEO must send the email to their line manager and the Data Quality mailbox.

What the Data Governance & Assurance team will do

The Data Governance team manages the Data Quality mailbox. When they receive an email request to delete or amend a case note or passport note, they will:

1. Contact the security team to authorise the correction.
2. Raise a request to delete the note with the AMS service administrators or DAP Change release team (if it is authorised by the security team).
3. Email the operational HEO, to tell them:
 - if the request was authorised
 - if the request was refused

- when the request was completed

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