



ADEPT Workbook

Immigration Officers – Employer Accreditation and Job Check



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How to use this workbook

This workbook has been designed to guide you to complete the system steps in the live ADEPT system using real applications and activities, so you can learn on-the-job.

The first time you receive an activity type that you haven't completed before, use this workbook to learn about the process, then use either WalkMe or the User Guide, to complete the activity in ADEPT.

Once you have completed the activity, tick the box in this workbook.

Because you are using the live environment, it may take some time for you to experience each type of activity.

IMPORTANT – Remember, you will be using live applications when you perform the tasks in this workbook.

The steps in this workbook are focussed on system actions only. You must refer to the related standard operating procedures (SOPs) for procedures that are related to the application you are processing.

Ask for help from your manager or change agent if you are unsure about any processes.

Who this workbook is for

This workbook has been designed for **Immigration Officers**, who are working on Employer Accreditation or Job Check applications. A separate workbook exists for IOs working on Visa applications.

If you need further learning on the ADEPT system, visit the [ADEPT Learning Programme page](#) on Learn@MBIE, and select your role.

User Guides

There are two User Guides available on INZ Kit:

- **ADEPT User guide** – This guide contains guidance on using ADEPT for all visa types.
- **ADEPT User Guide: Employer Accreditation and Job Check** – This guide contains specific Employer Accreditation and Job Check ADEPT guidance.

Both guides can be found here: <http://thelink/content/inzkit/Pages/processing-applications.aspx>

Make sure you bookmark the link rather than download as the User Guides are updated regularly.

Note - We have not included the User Guide section numbers in this guide as the User Guide changes regularly and new sections are added. Use the Contents page of the User Guide to find the right section.

Standard Operating Procedures (SOPs)

Please ensure you are referring to the relevant SOPs for your role and the task you are performing where necessary. SOPs are available on GloPro: [Global Process Manual](#).

WalkMe

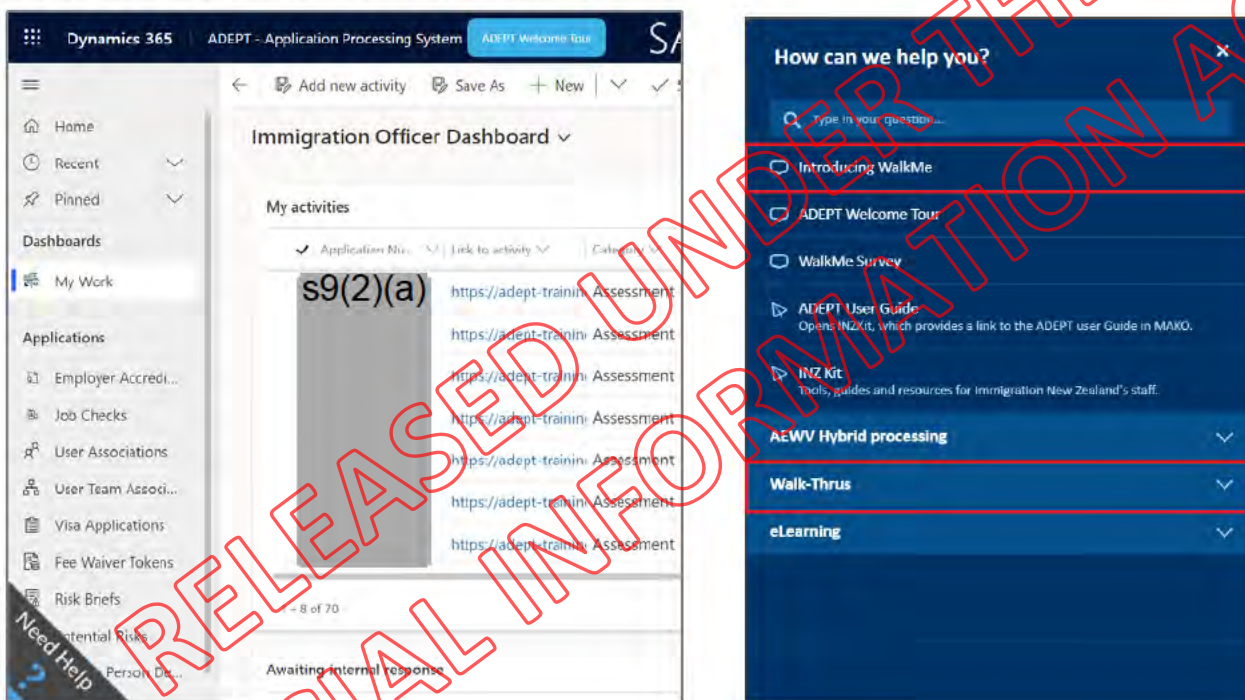
WalkMe is a system that sits on top of ADEPT that can walk you through a process using call outs to step you every step of the way through a process (**Walk-Thru**).

There are also WalkMe SmartTips that will give you tips as you process the request – look for the icon when you are using ADEPT.

How to search for a process (Walk-Thru) in WalkMe:

Use the **Need Help** menu at the bottom left of the ADEPT screen and type in the task you would like support with, e.g., Create Alert or Warning, or look under the **Walk-Thrus** category

Select the **Introducing WalkMe** link to learn more.



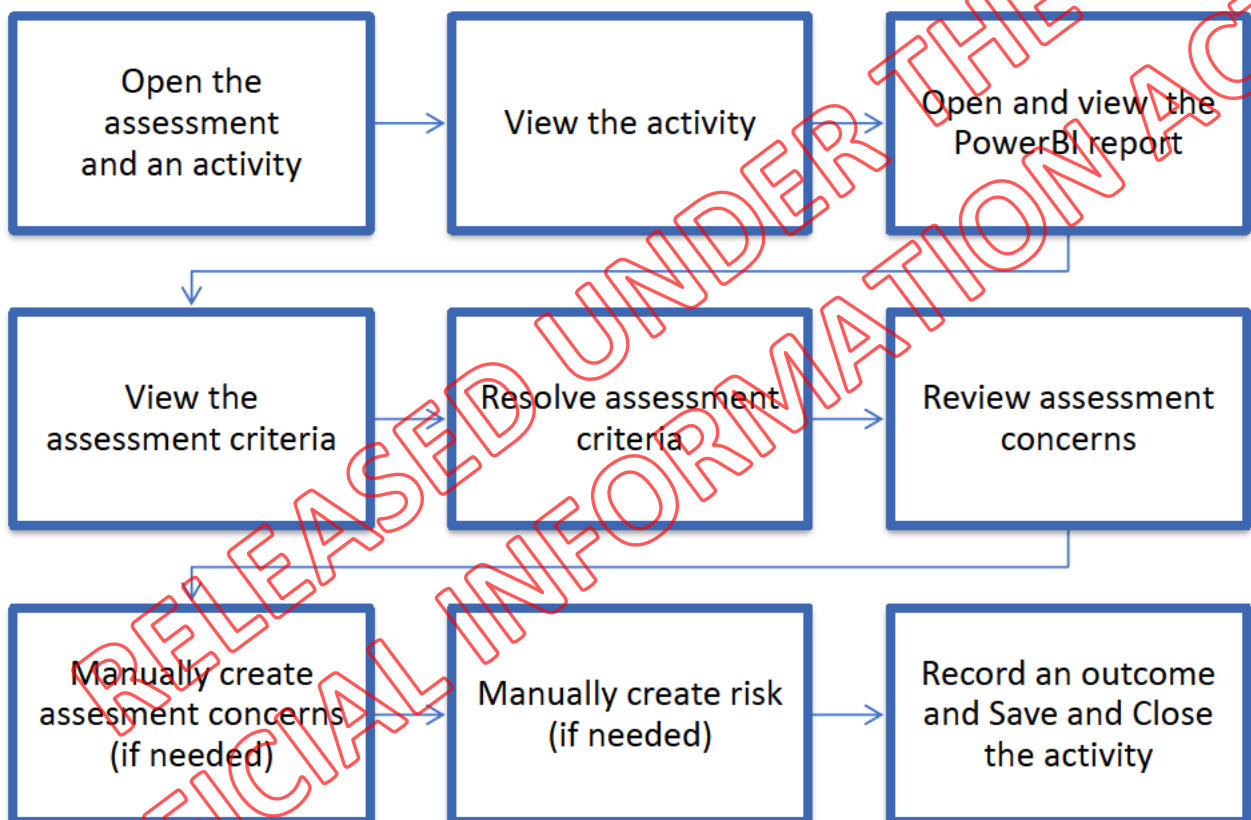
If WalkMe is not available for a particular activity or process, please refer to the User Guide.





Complete an Assessment Activity

In this section of this workbook, you will use the live ADEPT system to complete assessment activities using the User Guides and WalkMe to support you.

Before you start processing activities in the live system, let's look at the high-level system steps of processing an activity in ADEPT.

Below you will see a flow chart with the steps you need to take in ADEPT to complete an assessment activity (remember these are the system steps only, not the process steps).



 Activity	Resources	Completed
<p>Pull and open an Employer Accreditation or Job Check application</p> <p>With Employer Accreditation and Job Check applications, a single IO processes all activities in the application (a case-based approach). To work on a new application, pull an application into the My activities grid.</p> <p>Once the application is open, the information about the application is displayed on the application screen. You can see the basic information about the application in the General tab.</p> <p>Locate and open an assessment activity of RFI/PPI activity</p> <ul style="list-style-type: none"> Go to the Assessment Activities and RFI tab. Select an activity to work on - Open the link under the Name column. <p>Use the resources listed to complete the activity and tick the box once completed.</p>	<p></p> <p>Search:</p> <ul style="list-style-type: none"> Assess an Accreditation Application (EA) Assess a Job Check Application (JC) <p>ADEPT Employer Accreditation & Job Check User Guide</p> <p>Immigration Officer:</p> <ul style="list-style-type: none"> Pull an Accreditation/Job Check Application Open an Accreditation / Job Check Application View Accreditation Application View Job Check Application View Assessment activities 	<input type="checkbox"/>
<p>Complete an Assessment Activity</p> <p>When you assess a manual assessment activity, other than a risk activity, you must, at a minimum:</p> <ul style="list-style-type: none"> view the Power BI report (if available) view and resolve the Assessment Criteria view the Assessment Concern, and select an Outcome Save and close the activity. <p>If you do not close the activity, it cannot progress to the next stage of the process.</p> <p>Use the resources listed to complete the activity and tick the box once completed.</p>	<p></p> <p>Search: Complete assessment activity</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Assessing an Assessment Activity</p>	<input type="checkbox"/>
<p>Manually add an assessment concern</p> <p>When you need to manually add an assessment concern, use the resources listed to complete the activity and tick the box once completed.</p>	<p>ADEPT User Guide</p> <p>Immigration Officer: Manually creating an assessment concern</p>	<input type="checkbox"/>
<p>Manually add a risk</p> <p>When you need to manually add a risk, use the resources listed to complete the activity and tick the box once completed.</p>	<p></p> <p>Search: Manually create a risk and risk activity</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Manually creating a risk and risk activity</p>	<input type="checkbox"/>

Close an assessment activity

Once you have reviewed all the assessment criteria and concerns for the assessment activity, you need to record an outcome for the activity.

If you select:	ADEPT action
Require Further Info	The activity assessment is completed with an assessment concern/s.
Instructions Met	Activity assessment completed with no concerns.
Cancelled	Cancels the activity and removes it from your dashboard. E.g. When the application is withdrawn.

It is important that activities are closed, otherwise the next part of the Visa process doesn't get initiated, resulting in delays to the application. For Job Checks, it is important to close all activities before you record a final decision.

Use the resources listed to complete the activity and tick the box once completed.



Search: Complete an Assessment Activity (See the last part of this process)

[ADEPT User Guide](#)

Immigration Officer: Closing an Assessment Activity

Flag an RFI/PPI

After the assessment activity is closed, if there is an assessment concern/s relating to any of the manual activities in an application, ADEPT automatically creates a *Request for more information* activity, commonly referred to as an RFI/PPI activity. It collects all the activities into one RFI/PPI activity.

For instructions on creating and assessing an RFI/PPI, see the *Make a Decision – RFI/PPI tasks* section of this workbook.

[ADEPT User Guide](#)




Immigration Officer: Flagging an RFI/PPI


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Complete an Assessment Activity – Related tasks

In this section of this workbook, you will use the live ADEPT system to complete the following assessment activity related tasks using the User Guides and WalkMe to support you:

- Request to push back activity
- Complete an Additional Document Activity
- Update client details
- Complete an Application Finalisation Assessment
- Check the status of an employer’s accreditation

 Activity	Resources	Completed
<p>Request to push back an activity</p> <p>If you believe you do not have the skills needed to complete an activity or application, or there is a conflict of interest, you can request to push it back.</p> <p>When you wish to push back an activity, use the resources listed to request a ‘push back’ and tick the box once completed.</p>	<p></p> <p>Search: Push back an Activity</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Push back an activity</p>	<input type="checkbox"/>
<p>Complete an Additional Document Activity</p> <p>Clients can contact INZ and upload documents using the Immigration Online portal. Changes requested in this portal will appear as an Additional Document Assessment activity. You will need to read the information provided in the activity and take appropriate action, if necessary.</p> <p>When you assess this activity type, use the resources listed and tick the box once completed.</p>	<p></p> <p>Search: Additional Document Activity</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Assessing an Additional Document Activity</p>	<input type="checkbox"/>
<p>Update client details</p> <p>In the event the applicant’s personal details have changed, the applicant can send this information using the Immigration Online portal. The applicant needs to upload any relevant documents and enter a message requesting the change.</p> <p>When the applicant has submitted the request, an Additional Document Assessment activity is created, and an Immigration Officer pulls it from their queue.</p> <p>Use the resources listed to complete the activity and tick the box once completed.</p>	<p>ADEPT User Guide</p> <p>Immigration Officer: Update client details</p>	<input type="checkbox"/>





 Activity	Resources	Completed
<p>Complete an Application Finalisation Assessment</p> <p>This activity is created when ADEPT is trying to finalise the application but there is an outstanding system concern. For example, if a Quality Check is closed without all quality concerns being addressed.</p> <p>The System Concern tab will display the reasons the system raised the activity and what outstanding tasks remain. The IO needs to complete all these tasks and record an Outcome.</p> <p><i>Note - If the Outcome is set to Instructions met, the system will proceed to issue the visa, regardless of the status of the outstanding tasks.</i></p> <p>If you receive one of these activities, use the resources listed to complete it and tick the box once completed.</p>	<p>walkme</p> <p>Search: Complete an Application Finalisation Assessment activity</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Completing an Application Finalisation Assessment</p>	<input type="checkbox"/>
<p>Check the status of an employer's accreditation</p> <p>If you need to check if an employer is accredited, use the resources listed and tick the box once completed</p>	<p>ADEPT Employer Accreditation & Job Check User Guide</p> <p>Immigration Officer: Check the status of an employer accreditation</p>	<input type="checkbox"/>



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Alerts and Warnings

In this section of this workbook, you will use the live ADEPT system to complete the following tasks using the User Guides and WalkMe to support you:

- View an alert or warning
- Create an alert or warning
- Delete/deactivate an alert or warning
- Edit an alert or warning.

 Activity	 Resources	Completed
<p>View an alert or warning</p> <p>Alerts and warnings in ADEPT are used to alert others of risks related to the application or applicant. There are three types of alert/warning, for Travel Documents, Clients and Employers.</p> <p>The alerts and warnings that you will see in the ADEPT Alerts/Warnings tab will only be those which were created in ADEPT, as opposed to any raised in AMS.</p> <p>Alerts and warnings from AMS can be seen in some Power BI reports, alongside ADEPT Alerts/Warnings.</p> <p>Client and Travel Document alerts/warnings raised in ADEPT will be synched to AMS, but Employer Alerts raised in ADEPT are not synched to AMS.</p> <p>Existing alerts or warnings trigger Risk Assessment activities in ADEPT when those parties apply for a new Visa or Employer Accreditation. e.g. An alert relating to a stolen passport for someone who is applying for a Visitor Visa, will trigger a Risk Assessment activity on their application.</p> <p>Use the resources listed to complete the task and tick the box once completed.</p>	<p></p> <p>Search: View Alert or Warning</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Viewing Alerts and Warnings</p>	<input type="checkbox"/>
<p>Create an alert or warning</p> <p>You can record alerts and warnings in ADEPT against Clients (individuals), Travel Documents & Employers.</p> <p>Before you create an alert or warning in ADEPT you need to use the s6(c)</p> <p>[Redacted]</p> <p>[Redacted]</p> <p>Use the resources listed to complete the task and tick the box once completed.</p>	<p></p> <p>Search: Create Alert or Warning</p> <p>ADEPT User Guide</p> <p>Common Capability: Creating Alerts and Warnings</p>	<input type="checkbox"/>

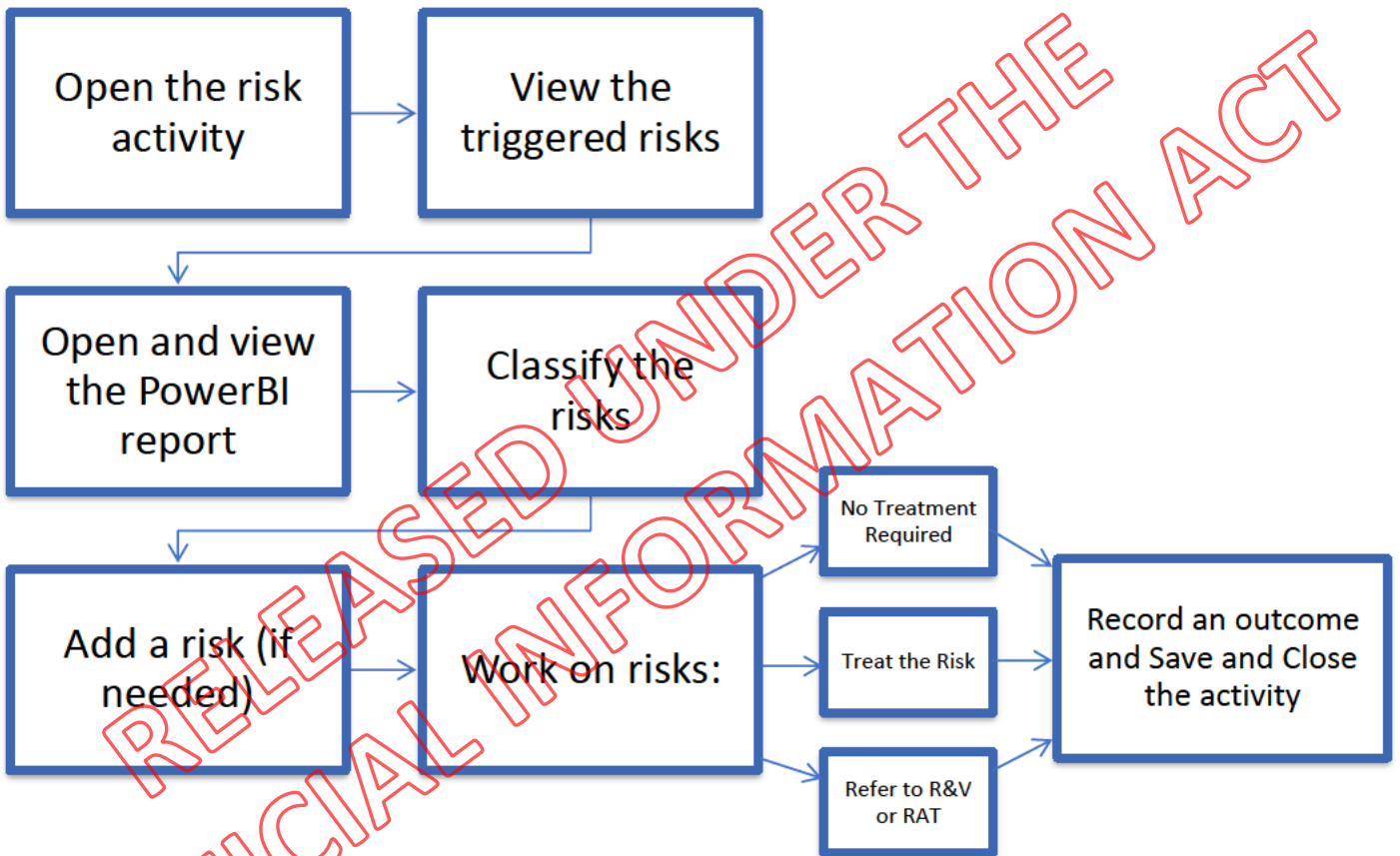
 Activity	 Resources	Completed
<p>Delete/deactivate an alert or warning</p> <p>All business processes for when and why to edit or delete/deactivate an alert or warning must be followed. (e.g. The Border Alert Removal Template (BART) process.)</p> <p>An alert and warning can only be deleted/deactivated by the user who created it, or an IM.</p> <p>ADEPT and AMS use different terms for the status of an alert or warning that is no longer needed/relevant. AMS uses <i>Deleted</i>, and ADEPT uses <i>Deactivate</i> because you can enable the alert in the future in ADEPT, if required.</p> <p>There are two steps you must take in ADEPT to delete and deactivate an alert or warning that exists in both ADEPT and AMS (Travel Document and Client Alerts exist in both systems.)</p> <ol style="list-style-type: none"> 1. Change the Status of the alert/warning to Deleted (which tells AMS to delete the alert) 2. Deactivate the Alert. <p>Note - You only need to deactivate Employer alerts in ADEPT. You do not need to change the status of the alert to 'Deleted' because Employer alerts raised in ADEPT are not sent to AMS.</p> <p>When you need to delete/deactivate an alert, use the resources to the right and tick the box once completed.</p>	<p>ADEPT User Guide</p> <p>Common Capability: Deleting Alerts and Warnings</p>	<input type="checkbox"/>
<p>Edit an alert or warning</p> <p>An alert or warning can be edited by the user who created it, or an IM.</p> <p>Updates are recorded in the audit trail, so you can see the previous data and who updated it.</p> <p>You can change the expiry date on an alert or warning if it is no longer relevant from a certain date.</p> <p>When you need to edit an alert, use the resources listed and tick the box once completed.</p>	<p>ADEPT User Guide</p> <p>Immigration Officer: Editing Alerts and Warnings</p>	<input type="checkbox"/>

Complete a Risk Assessment Activity





In this section of this workbook, you will use the live ADEPT system to complete risk assessment activities using the User Guides and WalkMe to support you.

Before you start processing risk activities in the live system, let's look at the high-level system steps of processing a risk activity in ADEPT.

Below you will see a flow chart with the steps you need to take in ADEPT to complete a risk assessment activity (remember these are the system steps only, not the process steps).



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 Activity	 Resources	Completed
<p>Risk Assessment Activity</p> <p>When working through a risk assessment activity, you have three options to choose from:</p> <ol style="list-style-type: none"> No treatment required - Mark the risk as 'Treatment required – No' if the risk triggered by the system can be discounted. Treat the risk - Create and perform risk treatments. Refer to R&V - e.g. Refer to a Verification Officer or RAT for treatment or advice. <p>Use the resources listed to complete the activity and tick the box for each treatment type once completed.</p> <p>Risks identified after initial processing</p> <p>After the application has been assessed, and before it is finalised, §6(c) [REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]. An IO will receive this activity and they should process it like any other risk assessment activity, using the resources listed.</p>	<p></p> <p>Search: Complete a Risk Assessment Activity</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Assessing a Risk Assessment activity</p>	<p><i>No treatment required:</i></p> <p><input type="checkbox"/></p> <p><i>Treat a Risk:</i></p> <p><input type="checkbox"/></p> <p><i>Refer to R&V or RAT:</i></p> <p><input type="checkbox"/></p> <p><i>Request risk advice:</i></p> <p><input type="checkbox"/></p>
<p>Add a risk</p> <p>When you assess a risk assessment activity and you need to add a new risk, use the resources listed to complete the activity and tick the box once completed.</p>	<p></p> <p>Search: Add a risk</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Adding a risk</p>	<p><input type="checkbox"/></p>




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Make a Decision – RFI/PPI tasks

In this section of this workbook, you will use the live ADEPT system to complete the following tasks related to RFI/PPI using the User Guides and WalkMe to support you:

- Assess applicant RFI/PPI responses
- Raise a secondary RFI/PPI
- Raise a No Surprises Fact Sheet (NSFS)
- Create an Assessment Waiver





 Activity	 Resources	Completed
<p>Assess applicant responses RFI/PPI Activity</p> <p>When an applicant has responded to the RFI/PPI, the status of the RFI/PPI activity will change to Response Received in the Awaiting External Response grid of your dashboard.</p> <p>When you see the status is Response Received, use the resources listed to assess the activity and tick the box once completed.</p>	<p></p> <p>Search: Assess applicant responses to RFI/PPI</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Assessing an RFI/PPI, Assessing applicant responses</p>	<input type="checkbox"/>
<p>Raise a secondary RFI/PPI</p> <p>On some occasions, you might need to request more information from the applicant after the applicant has responded to the initial RFI or PPI. Make sure the first RFI/PPI activity has not been completed.</p> <p>When you need to raise a secondary RFI/PPI, raise the activity using the resources listed to complete the activity and tick the box once completed.</p>	<p></p> <p>Search: Raise a secondary RFI/PPI</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Assessing an RFI/PPI, Raising a Secondary RFI/PPI</p>	<input type="checkbox"/>
<p>Raise a No Surprises Fact Sheet (NSFS)</p> <p>If, during an assessment of an RFI/PPI Activity you identify a sensitive issue, you need to advise an Immigration Manager (IM) by raising a No Surprises Fact Sheet (NSFS). The IM will then submit the NSFS to the appropriate team in MBIE.</p> <p>When you need to raise a NSFS, use the resources listed to raise the NSFS and tick the box once completed.</p>	<p></p> <p>Search: Raise an NSFS</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Raise a No Surprises Fact Sheet</p>	<input type="checkbox"/>

 Activity	 Resources	Completed
<p>Create an Assessment Waiver</p> <p>If you consider that a waiver of specific requirements in the instructions is appropriate, an assessment waiver can be created. An assessment waiver must be approved by an IM or higher, therefore, an assessment waiver request appears in the IM dashboard when an IO submits an assessment waiver for approval.</p> <p>When you need to create an assessment waiver request, raise the request using the resources listed and tick the box once completed.</p>	<p></p> <p>Search: Create Assessment Waiver Request</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Create Assessment Waiver</p>	<input data-bbox="1331 331 1382 380" type="checkbox"/>

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Make a Decision – Approve or Decline an application



In this section of this workbook, you will use the live ADEPT system to approve or decline an application using the User Guides and WalkMe to support you.

 Activity	 Resources	Completed
<p>Approve an Employer Accreditation application</p> <p>When you need to approve an Employer Accreditation application, use the resources listed and tick the box once completed.</p>	<p>ADEPT Employer Accreditation and Job Check User Guide</p> <p>Immigration Officer: Approve an accreditation</p>	<input type="checkbox"/>
<p>Approve a Job Check application</p> <p>When all activities are completed and a Job Check application is going to be approved, an IO will need to complete the Additional Decision Details grid, found on the General tab of the Job Check. The IO will confirm the following which may have changed because of the assessment:</p> <ul style="list-style-type: none"> • Number of approved positions • Minimum work experience. • Minimum qualifications. • Minimum and maximum remuneration. <p>When you need to approve a Job Check application, use the resources listed and tick the box once completed.</p>	<p></p> <p>SmartTips <i>There are WalkMe SmartTips that will give you tips as you complete the Additional Details grid – Look for the ? icon.</i></p> <p>ADEPT Employer Accreditation and Job Check User Guide</p> <p>Immigration Officer: Approve a Job Check application</p>	<input checked="" type="checkbox"/>
<p>Decline an application</p> <p>It is expected that you have assessed and completed all the activities, e.g. assessment activities and RFI/PPI activities, before proceeding to decline an application.</p> <p>If the RFI/PPI activity is completed as Instructions Not Met, then you can decline the application using WalkMe in ADEPT.</p> <p>When you need to decline an application, use the resources listed and tick the box once completed.</p>	<p></p> <p>Search: Decline an EA/JC Application</p> <p>ADEPT Employer Accreditation & Job Check User Guide</p> <p>Immigration Officer: Decline an application</p>	<input type="checkbox"/>

Make a Decision – Other tasks

In this section of this workbook, you will use the live ADEPT system to complete the following tasks using the User Guides and WalkMe to support you:

- Manage a Withdrawal
- Cancel or lapse an application
- Change Visa Conditions (before visa is issued)
- Complete Rework




 Activity	 Resources	Completed
<p>Manage a Withdrawal</p> <p>If an applicant decides to withdraw a submitted application before they have received the decision, the withdrawal request will appear on the IM’s dashboard. The IM will then assign the request to an Immigration Officer for processing.</p> <p>When you receive a withdrawal request, use the resources listed and tick the box once completed.</p>	<p>ADEPT User Guide Immigration Officer: Manage Withdrawal</p>	<input type="checkbox"/>
<p>Cancel or lapse an application</p> <p>There may be situations where it is appropriate to cancel or lapse an application, for example if it was submitted by mistake.</p> <p>When you need to cancel or lapse an application, use the resources listed and tick the box once completed.</p>	<p>ADEPT User Guide Immigration Officer: Cancelling and lapsing an application</p>	<input type="checkbox"/>



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Post-decision tasks

In this section of this workbook, you will use the live ADEPT system to complete the following post-decision tasks using the User Guides and WalkMe to support you:

- Manage a Reconsideration
- Revoke an Employer Accreditation
- Suspend an Employer Accreditation

 Activity	 Resources	Completed
<p>Manage a Reconsideration</p> <p>If the system receives a reconsideration request from the Immigration Online portal, the request will appear on the IM’s dashboard. The IM will then assign the request to an IO for processing. The reconsideration request will appear on My activities grid of the Immigration Officer dashboard.</p> <p>When you receive a reconsideration request, use the resources listed to process the request and tick the box once completed.</p>	<p>ADEPT User Guide Immigration Officer: Manage Reconsideration</p>	<input type="checkbox"/>
<p>Suspend an Employer Accreditation</p> <p>If an employer is not meeting the requirements of Employer Accreditation, their accreditation may be suspended for up to three months.</p> <p>When you need to suspend an employer’s accreditation, use the resources listed and tick the box when you are complete.</p> <p>For more information refer to the Suspension of employer accreditation SOP.</p> <p>When submitted, the suspension request will go to an Immigration Manager for approval. After an employer accreditation suspension is approved:</p> <ul style="list-style-type: none"> • a suspension letter will be sent to the employer • any Job Check applications and Job Tokens related to the employer will be suspended. <p><i>Note - After submitting the suspension request, you should raise a warning against the employer in both ADEPT and AMS. For more information about raising an alert, please refer to the Alerts and Warnings topic.</i></p>	<p> Search: Suspend an accreditation</p> <p>ADEPT User Guide Suspending an accreditation</p>	<input type="checkbox"/>

 Activity	 Resources	Completed
<p>Revoke an Employer Accreditation</p> <p>Revoking an accreditation is done in the same way as described above in Suspend an Employer Accreditation. The only differences with revoking are:</p> <ul style="list-style-type: none"> • You should select the value Revoke in the Recommended sanction field • You should always PPI the employer before revoking their accreditation • The approval will be done by a Head of Office (HOO), and the Immigration Manager will attach the approval decision (email) to the employer revocation. <p>For more information, refer to the Revoke Employer Accreditation SOP.</p> <p>When you need to revoke an employer's accreditation, use the resources listed and tick the box when you are complete.</p>	<p>ADEPT User Guide Revoking an accreditation</p>	<input type="checkbox"/>

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ADEPT Workbook

Immigration Officers (including SAT IOs)



MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT
HĪKINA WHAKATUTUKI

New Zealand Government

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WalkMe

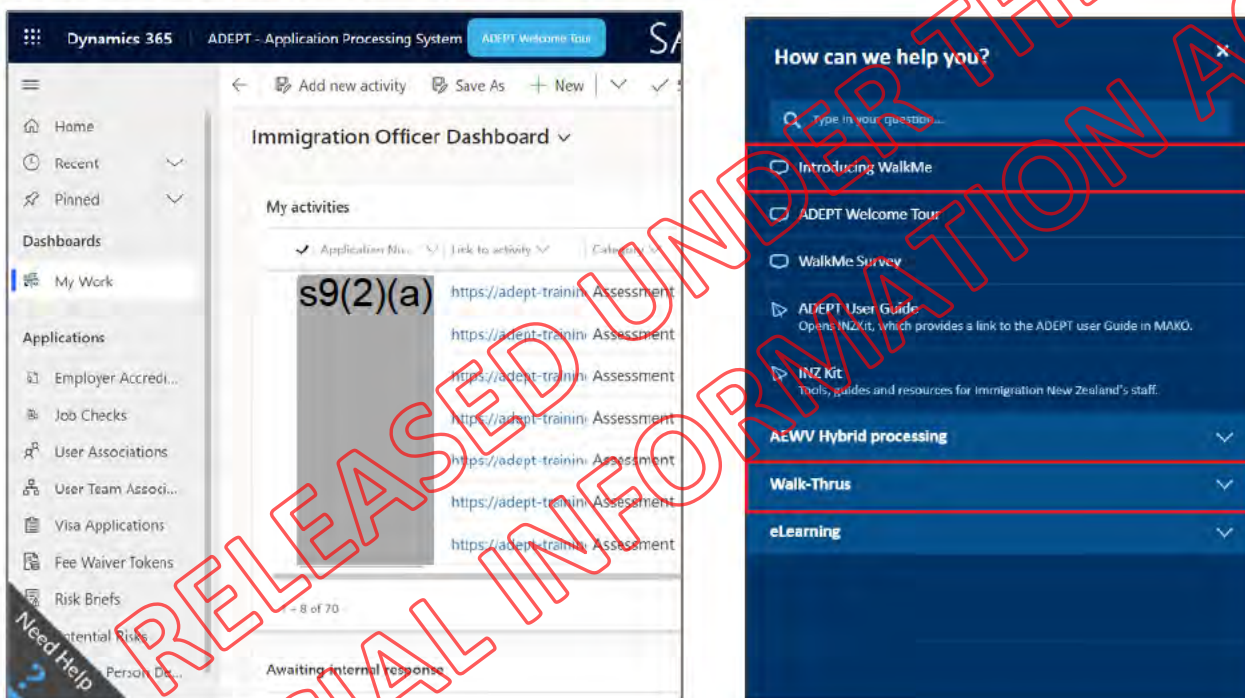
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Select the **Introducing WalkMe** link to learn more.



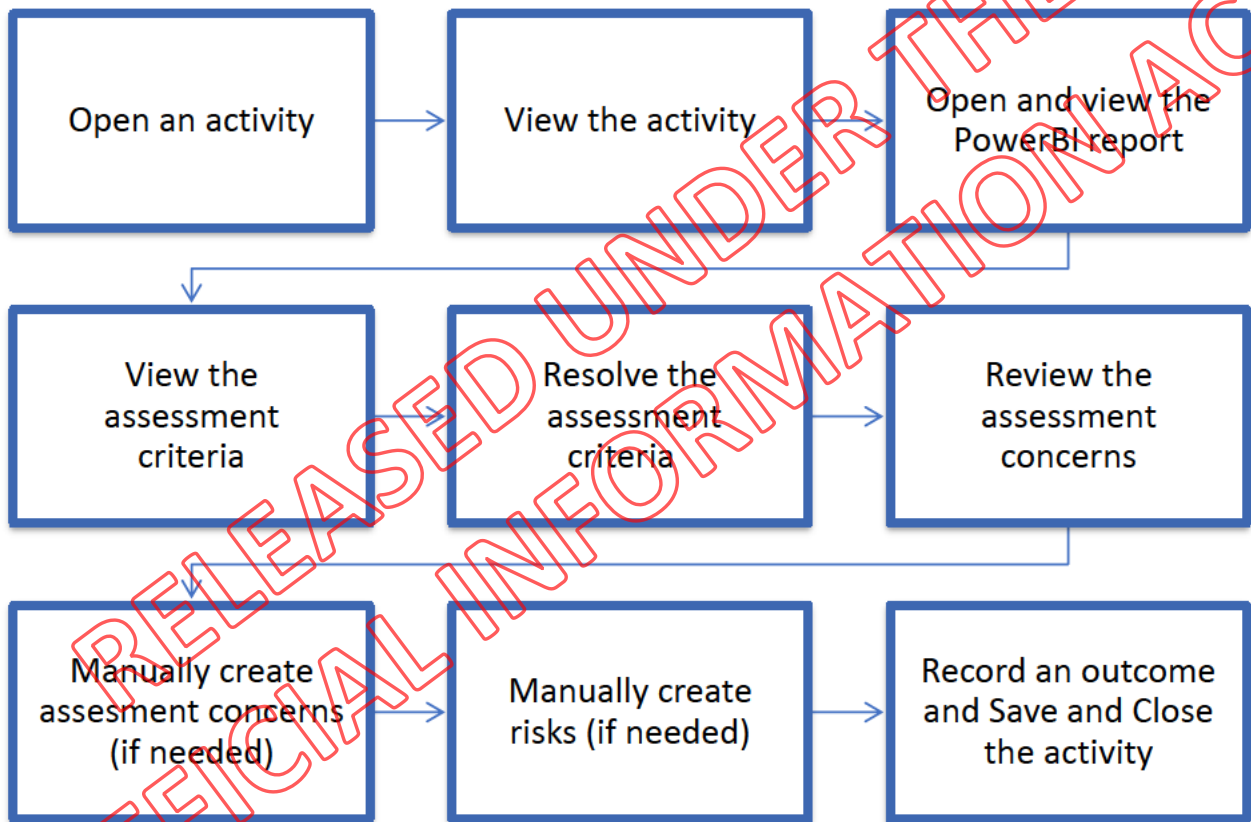
If WalkMe is not available for a particular activity or process, please refer to the User Guide.



Complete an Assessment Activity

In this section of this workbook, you will use the live ADEPT system to complete assessment activities using the User Guides and WalkMe to support you.

Before you start processing activities in the live system, let's look at the high-level system steps of processing an activity in ADEPT.

Below you will see a flow chart with the steps you need to take in ADEPT to complete an assessment activity (remember these are the system steps only, not the process steps).












 Activity	 Resources	Completed
<p>Complete an Assessment Activity</p> <p>When you assess any manual assessment activity type, use the resources listed to complete the activity and tick the box once completed.</p> <p>Also, see more detailed notes on specific assessment activity types, below.</p>	<p>walkme</p> <p>Search: Complete assessment activity</p> <p>ADEPT User Guide Immigration Officer: Assessing an Assessment Activity</p>	<input type="checkbox"/>
<p>Purpose Assessment Activities (Visitor Visa only)</p> <p>Purpose activities are a part of the assessment of Visitor Visa applications.</p> <p>When you assess a Purpose activity, refer to the resource on the right, and tick the box once completed.</p> <p><i>Note - If there is a Supporting Partner in the application, you will see any system concerns relating to the Supporting Partner in the Purpose Assessment Activity and the Purpose Power BI report.</i></p>	<p>ADEPT User Guide Immigration Officer: Assessing a Purpose Assessment Activity</p>	<input type="checkbox"/>
<p>Culturally Arranged Marriage (CAM) applications</p> <p>If you are part of the CAM team, use the resources listed above to complete the activities you are allocated. Also, refer to the CAM resource on the right, and tick the box once completed.</p>	<p>ADEPT User Guide Immigration Officer: CAM applications</p>	<input type="checkbox"/>
<p>Manually add a risk</p> <p>When you need to manually add a risk, use the resources listed to complete the activity and tick the box once completed.</p>	<p>walkme</p> <p>Search: Manually create a risk and risk activity</p> <p>ADEPT User Guide Immigration Officer: Manually creating a risk and risk activity</p>	<input type="checkbox"/>
<p>Manually add an assessment concern</p> <p>When you need to manually add an assessment concern, use the resources listed to complete the activity and tick the box once completed.</p>	<p>ADEPT User Guide Immigration Officer: Manually creating an assessment concern</p>	<input type="checkbox"/>





Complete an Assessment Activity – Related tasks

In this section of this workbook, you will use the live ADEPT system to complete the following assessment activity related tasks using the User Guides and WalkMe to support you:

- Request to push back activity
- Complete an Additional Document Activity
- Update client details
- Complete an Application Finalisation Assessment
- Manually request New Zealand Police Certificate
- Manually record a Police Certificate
- Manually request National Security Certificate
- Manually retrigger identity resolution

 Activity	 Resources	Completed
<p>Request to push back an activity</p> <p>If you believe you do not have the skills needed to complete an activity or application, or there is a conflict of interest, you can request to push it back.</p> <p>When you wish to push back an activity, use the resources listed to request a 'push back' and tick the box once completed.</p>	 <p>Search: Push back an Activity</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Push back an activity</p>	<input type="checkbox"/>
<p>Complete an Additional Document Activity</p> <p>Clients can contact INZ and upload documents using the Immigration Online portal. Changes requested in this portal will appear as an Additional Document Assessment activity.</p> <p>Read the information provided in the activity and take appropriate action, if necessary.</p> <p>When you assess this activity type, use the resources listed and tick the box once completed.</p>	 <p>Search: Additional Document Activity</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Assessing an Additional Document Activity</p>	<input type="checkbox"/>
<p>Update client details</p> <p>In the event the applicant's personal details have changed due to a change in circumstances, the applicant can send this information using the Immigration Online portal. The applicant is required to upload any relevant documents and enter a message requesting the change.</p>	<p>ADEPT User Guide</p> <p>Immigration Officer: Update client details</p>	<input type="checkbox"/>





 Activity	 Resources	Completed
<p>When the applicant has submitted the request, an Additional Document Assessment activity is created, and an Immigration Officer pulls it from their queue.</p> <p>Use the resources listed to complete the activity and tick the box once completed.</p>		
<p>Complete an Application Finalisation Assessment</p> <p>This activity is created when ADEPT is trying to finalise the application but there is an outstanding system concern. For example, if a Quality Check is closed without all quality concerns being addressed.</p> <p>The System Concern tab will display the reasons the system raised the activity and what outstanding tasks remain. The IO needs to complete all these tasks and record an Outcome.</p> <p><i>Note - If the Outcome is set to Instructions met, the system will proceed to issue the visa, regardless of the status of the outstanding tasks.</i></p> <p>If you receive one of these activities, use the resources listed to complete it and tick the box once completed.</p>	<p></p> <p>Search: Complete an Application Finalisation assessment activity</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Completing an Application Finalisation Assessment</p>	<input type="checkbox"/>
<p>Manually request New Zealand Police Certificate</p> <p>NZPCs are automatically requested by the ADEPT system when required, but there may be times when you want to request one as a matter of discretion, e.g. if the applicant declares a conviction.</p> <p>Use the resources listed to complete the task and tick the box once completed.</p>	<p></p> <p>Search: Manually Request NZPC</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Manually request NZPC</p>	<input type="checkbox"/>
<p>Manually record a New Zealand Police Certificate</p> <p>There may be situations where a New Zealand police certificate or a foreign police certificate is obtained outside of ADEPT as part of the assessment process or via a request for information.</p> <p>In this scenario, use the resources listed to complete the task and tick the box once completed.</p>	<p>ADEPT User Guide</p> <p>Immigration Officer: Manually record a Police Certificate</p>	<input type="checkbox"/>
<p>Manually request a National Security Certificate</p> <p>National Security Certificates are automatically requested by the ADEPT system, when needed. s6(c)</p> <p>[Redacted]</p> <p>[Redacted]</p>	<p></p> <p>Search: s6(c)</p> <p>ADEPT User Guide</p> <p>Immigration Officer: s6(c)</p> <p>[Redacted]</p> <p>[Redacted]</p>	<input type="checkbox"/>



 Activity	 Resources	Completed
<ul style="list-style-type: none"> s6(c) [redacted] <p>Use the resources listed to complete the task and tick the box once completed.</p>		
<p>Manually retrigger identity resolution</p> <p>When an application is submitted, the system automatically carries out an identity resolution for applicants using the biographic and biometric information presented in the application.</p> <p>s6(c) [redacted]</p>	<p></p> <p>Search: Manually retrigger Identity Resolution</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Manually retriggering identity resolution</p>	<input type="checkbox"/>
<p>Change of Identity Assessment</p> <p>When an Identity Resolution is manually triggered, it is sent to IDMe. If IDMe links the applicant to a different client than they were originally linked to, ADEPT creates a <i>Change of Identity Assessment</i> activity. s6(c) [redacted]</p> <p>s6(c) [redacted]</p> <p>You can also use the resources listed and tick the box once completed.</p>	<p></p> <p>Search: Complete a Change of Identity assessment activity</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Assessing a Change of Identity Assessment Activity</p>	<input type="checkbox"/>

Alerts and Warnings

In this section of this workbook, you will use the live ADEPT system to complete the following tasks using the User Guides and WalkMe to support you:

- View an alert or warning
- Create an alert or warning
- Delete/deactivate an alert or warning
- Edit an alert or warning.

 Activity	 Resources	Completed
<p>View an alert or warning</p> <p>Alerts and warnings in ADEPT are used to alert others of risks related to the application or applicant. There are three types of alert/warning, for Travel Documents, Clients and Employers.</p> <p>The alerts and warnings that you will see in the ADEPT Alerts/Warnings tab will only be those which were created in ADEPT, as opposed to any raised in AMS.</p> <p>Alerts and warnings from AMS can be seen in some Power BI reports, alongside ADEPT Alerts/Warnings.</p> <p>Client and Travel Document alerts/warnings raised in ADEPT will be synched to AMS, but Employer Alerts raised in ADEPT are not synched to AMS.</p> <p>Existing alerts or warnings trigger Risk Assessment activities in ADEPT when those parties apply for a new Visa or Employer Accreditation. e.g. An alert relating to a stolen passport for someone who is applying for a Visitor Visa, will trigger a Risk Assessment activity on their application.</p> <p>Use the resources listed to complete the task and tick the box once completed.</p>	 <p>Search: View Alert or Warning</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Viewing Alerts and Warnings</p>	<input type="checkbox"/>
<p>Create an alert or warning</p> <p>You can record alerts and warnings in ADEPT against Clients (individuals), Travel Documents & Employers.</p> <p>Before you create an alert or warning in ADEPT you need to use the s6(c)</p> <p></p> <p></p> <p>Use the resources listed to complete the task and tick the box once completed.</p>	 <p>Search: Create Alert or Warning</p> <p>ADEPT User Guide</p> <p>Common Capability: Creating Alerts and Warnings</p>	<input type="checkbox"/>

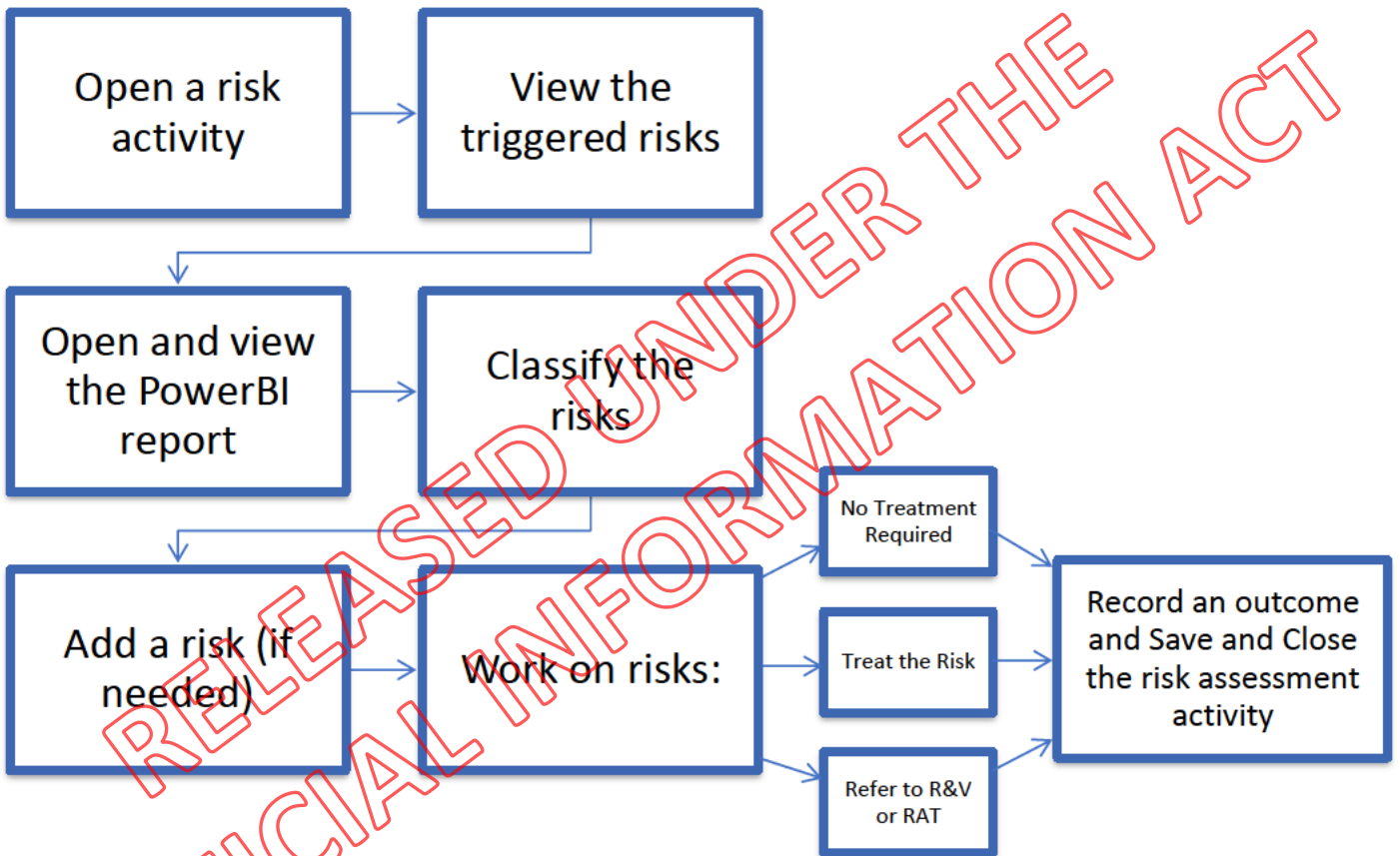
 Activity	 Resources	Completed
<p>Delete/deactivate an alert or warning</p> <p>All business processes for when and why to edit or delete/deactivate an alert or warning must be followed. (e.g. The Border Alert Removal Template (BART) process.)</p> <p>An alert and warning can only be deleted/deactivated by the user who created it, or an IM.</p> <p>ADEPT and AMS use different terms for the status of an alert or warning that is no longer needed/relevant. AMS uses <i>Deleted</i>, and ADEPT uses <i>Deactivate</i> because you can enable the alert in the future in ADEPT, if required.</p> <p>There are two steps you must take in ADEPT to delete and deactivate an alert or warning that exists in both ADEPT and AMS (Travel Document and Client Alerts exist in both systems.)</p> <ol style="list-style-type: none"> 1. Change the Status of the alert/warning to Deleted (which tells AMS to delete the alert) 2. Deactivate the Alert. <p><i>Note - You only need to deactivate Employer alerts in ADEPT. You do not need to change the status of the alert to 'Deleted' because Employer alerts raised in ADEPT are not sent to AMS.</i></p> <p>When you need to delete/deactivate an alert, use the resources to the right and tick the box once completed.</p>	<p>ADEPT User Guide</p> <p>Common Capability: Deleting Alerts and Warnings</p>	<input type="checkbox"/>
<p>Edit an alert or warning</p> <p>An alert or warning can be edited by the user who created it, or an IM.</p> <p>Updates are recorded in the audit trail, so you can see the previous data and who updated it.</p> <p>You can change the expiry date on an alert or warning if it is no longer relevant from a certain date.</p> <p>When you need to edit an alert, use the resources to the right and tick the box once completed.</p>	<p>ADEPT User Guide</p> <p>Immigration Officer: Editing Alerts and Warnings</p>	<input type="checkbox"/>

Complete a Risk Assessment Activity





In this section of this workbook, you will use the live ADEPT system to complete risk assessment activities using the User Guides and WalkMe to support you.

Before you start processing risk activities in the live system, let's look at the high-level system steps of processing a risk activity in ADEPT.

Below you will see a flow chart with the steps you need to take in ADEPT to complete a risk assessment activity (remember these are the system steps only, not the process steps).



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 Activity	 Resources	Completed
<p>Risk Assessment Activity</p> <p>When working through a risk assessment activity, you have three options to choose from:</p> <ol style="list-style-type: none"> No treatment required - Mark the risk as 'Treatment required – No' if the risk triggered by the system can be discounted. Treat the risk - Create and perform risk treatments. Refer to R&V - e.g. Refer to a Verification Officer or RAT for treatment or advice. <p>Use the resources listed to complete the activity and tick the box for each treatment type once completed.</p> <p>Risks identified after initial processing</p> <p>After the application has been assessed, and before it is finalised, business rules run in ADEPT to check if there have been any changes to the application during assessment that would create new risks. A new risk assessment activity will be created if new risks are identified by ADEPT. An IO will receive this activity and they should process it like any other risk assessment activity, using the resources listed.</p>	<p></p> <p>Search: Complete a Risk Assessment Activity</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Assessing a Risk Assessment activity</p>	<p><i>No treatment required:</i></p> <p><input type="checkbox"/></p> <p><i>Treat a Risk:</i></p> <p><input type="checkbox"/></p> <p><i>Refer to R&V or RAT:</i></p> <p><input type="checkbox"/></p> <p><i>Request risk advice:</i></p> <p><input type="checkbox"/></p>
<p>Add a risk</p> <p>When you need to add a risk, use the resources listed to complete the activity and tick the box once completed.</p>	<p></p> <p>Search: Add a risk</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Adding a risk</p>	<p><input type="checkbox"/></p>






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Make a Decision – RFI/PPI tasks

In this section of this workbook, you will use the live ADEPT system to complete the following tasks related to RFI/PPI using the User Guides and WalkMe to support you:




- Assess applicant RFI/PPI responses
- Raise a secondary RFI/PPI
- Raise a No Surprises Fact Sheet (NSFS)
- Request Special Direction
- Create an Assessment Waiver
- Grant an Exception to Instructions (ETI)

 Activity	 Resources	Completed
<p>Assess applicant responses RFI/PPI Activity</p> <p>When an applicant has responded to the RFI/PPI, the status of the RFI/PPI activity will change to Response Received in the Awaiting External Response grid of your dashboard.</p> <p>When you see the status is Response Received, use the resources listed to assess the activity and tick the box once completed.</p>	<p></p> <p>Search: Assess applicant responses to RFI/PPI</p> <p>ADEPT User Guide Immigration Officer: Assessing an RFI/PPI, Assessing applicant responses</p>	<input type="checkbox"/>
<p>Raise a secondary RFI/PPI</p> <p>On some occasions, you might need to request more information from the applicant after the applicant has responded to the initial RFI or PPI. Make sure the first RFI/PPI activity has not been completed.</p> <p>If you need to raise a secondary RFI/PPI, raise the activity using the resources listed to complete the activity and tick the box once completed.</p>	<p></p> <p>Search: Raise a secondary RFI/PPI</p> <p>ADEPT User Guide Immigration Officer: Assessing an RFI/PPI, Raising a Secondary RFI/PPI</p>	<input type="checkbox"/>
<p>Raise a No Surprises Fact Sheet (NSFS)</p> <p>If, during an assessment of an RFI/PPI Activity you identify a sensitive issue, you need to advise an Immigration Manager (IM) by raising a No Surprises Fact Sheet (NSFS). The IM will then submit the NSFS to the appropriate team in MBIE.</p> <p>If you need to raise a NSFS, use the resources listed to raise the NSFS and tick the box once completed.</p>	<p></p> <p>Search: Raise an NSFS</p> <p>ADEPT User Guide Immigration Officer: Raise a No Surprises Fact Sheet</p>	<input type="checkbox"/>

 Activity	 Resources	Completed
<p>Request Special Direction</p> <p>When you are assessing an RFI/PPI Activity, you may need to request special directions if you are assessing an application for an applicant who is ineligible. You can then send a Special Direction request form to an immigration manager who can approve it.</p> <p>If you need to request a Special Direction, use the resources listed to raise the request and tick the box once completed.</p>	<p></p> <p>Search: Request Special Direction</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Request a Special Direction</p>	<input type="checkbox"/>
<p>Create an Assessment Waiver</p> <p>If you consider that a waiver of specific requirements in the instructions is appropriate, an assessment waiver can be created. An assessment waiver must be approved by an IM or higher, therefore, an assessment waiver request appears in the IM dashboard when an IO submits an assessment waiver for approval.</p> <p>If you need to create an assessment waiver request, raise the request using the resources listed and tick the box once completed.</p>	<p></p> <p>Search: Create Assessment Waiver Request</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Create Assessment Waiver</p>	<input checked="" type="checkbox"/>
<p>Change Visa Type (Alternate visa)</p> <p>IOs can propose an alternate visa to a client as part of the RFI/PPI process. Once an alternate visa type is proposed, ADEPT will calculate any additional fees or refunds. Use the resources listed to complete the changes and tick the box once completed.</p>	<p>ADEPT User Guide</p> <p>Immigration Officer: Change Visa Type (Alternate Visa)</p>	<input type="checkbox"/>
<p>Grant an Exception to Instructions (ETI)</p> <p>When you wish to grant an exception to instructions (ETI), use the resources listed to grant the exception and tick the box once completed.</p>	<p></p> <p>Search: Grant an ETI</p> <p>ADEPT User Guide</p> <p>Immigration Officer: Other Options available in an RFI/PPI: Granting an ETI</p>	<input type="checkbox"/>

Make a Decision – Approve or Decline an application

In this section of this workbook, you will use the live ADEPT system to approve or decline an application using the User Guides and WalkMe to support you.



 Activity	 Resources	Completed
<p>Approve an application</p> <p>If you want to approve an application, use the resources listed to approve the application and tick the box once completed.</p>	<p>ADEPT User Guide Immigration Officer: Approve an application</p>	<input type="checkbox"/>
<p>Decline an application</p> <p>If you want to decline an application, use the resources listed to decline the application and tick the box once completed.</p>	<p> Search: Decline an application ADEPT User Guide Immigration Officer: Decline an application</p>	<input type="checkbox"/>




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Make a Decision – Other tasks

In this section of this workbook, you will use the live ADEPT system to complete the following tasks using the User Guides and WalkMe to support you:

- Manage a Withdrawal
- Cancel or lapse an application
- Change Visa Conditions (before visa is issued)
- Complete Rework

 Activity	 Resources	Completed
<p>Manage a Withdrawal</p> <p>If an applicant decides to withdraw a submitted application before they have received the decision, the withdrawal request will appear on the IM’s dashboard.</p> <p>The IM will then assign the request to an Immigration Officer for processing.</p> <p>When you receive a withdrawal request, process the request in ADEPT using the resources, on the right, and tick the box once completed.</p>	<p>ADEPT User Guide Immigration Officer: Manage Withdrawal</p>	<input checked="" type="checkbox"/>
<p>Cancel or lapse an application</p> <p>There may be situations where it is appropriate to cancel or lapse an application, for example if it was submitted by mistake.</p> <p>When you need to cancel or lapse an application, use the resources listed and tick the box once completed.</p>	<p>ADEPT User Guide Immigration Officer: Cancelling and lapsing an application</p>	<input type="checkbox"/>
<p>Change Visa Conditions (before a visa is issued)</p> <p>Visa Conditions are the properties of the visa that will be displayed in the eVisa if the application is approved.</p> <p>The system always tries to apply the default visa conditions attached to a specific visa. On some occasions the system decides that the default conditions cannot be applied and raises an assessment concern, which is displayed in the activity Power BI report. When this happens, you should modify the visa conditions related to the application.</p> <p>Use the resources listed to complete the activity and tick the box once completed.</p>	<p>ADEPT User Guide Immigration Officer: Changing Visa Conditions (before visa is issued)</p>	<input type="checkbox"/>




 Activity	 Resources	Completed
<p>Complete Rework</p> <p>When a Technical Advisor (TA) has reviewed either an assessment activity or an application and has determined that some rework is required, they will raise a Quality Concern which is displayed in the My activities grid in the dashboard of the immigration officer who has originally assessed the activity or the application.</p> <p>Use the resources listed to complete the activity and tick the box once completed.</p>	<p>ADEPT User Guide Immigration Officer: Completing rework</p> <p> Search: Rework: Close the Quality Concern</p>	<input type="checkbox"/>




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Post-decision tasks

In this section of this workbook, you will use the live ADEPT system to complete the following post-decision tasks using the User Guides and WalkMe to support you:

- Manage Reconsiderations
- Assess a Variation of Conditions (VOC)
- Make changes to a visa (post-decision)
- Cancel a visa
- Revoke an Employer Accreditation (*Accredited Employer Work Visa only*)
- Suspend an Employer Accreditation (*Accredited Employer Work Visa only*)



 Activity	 Resources	Completed
<p>Manage a Reconsideration</p> <p>If the system receives a reconsideration request from the Immigration Online portal, the request will appear on the IM’s dashboard. The IM will then assign the request to an IO for processing. The reconsideration request will appear on My activities grid of the Immigration Officer dashboard.</p> <p>When you receive a reconsideration request, use the resources listed to process the request and tick the box once completed.</p>	<p>ADEPT User Guide Immigration Officer: Manage Reconsideration</p>	<input type="checkbox"/>
<p>Assess a Variation of Conditions (VOC)</p> <p>If the visa conditions no longer match the circumstances of the visa holder, the applicant can apply to change these conditions.</p> <p>Use the resources listed to complete this activity and tick the box once completed.</p>	<p>ADEPT User Guide Immigration Officer: Assessing a Variation of Conditions</p>	<input type="checkbox"/>
<p>Make changes to a visa (post decision)</p> <p>If you need to make a change to a visa after it has been issued, use the resources listed to complete the changes and tick the box once completed.</p>	<p>ADEPT User Guide Immigration Officer: Making changes to a visa (post decision)</p>	<input type="checkbox"/>
<p>Cancel a visa</p> <p>A cancellation of a visa must be approved by an IM or higher, therefore, a cancellation request appears in the IM dashboard when an IO submits a request for approval. If you wish to cancel a visa, use the resources listed to process the cancellation request and tick the box once completed.</p>	<p> Search: Cancel Visa ADEPT User Guide Immigration Officer: Cancel a visa</p>	<input type="checkbox"/>

 Activity	 Resources	Completed
<p>Suspend an Employer Accreditation</p> <p>If an employer is not meeting the requirements of Employer Accreditation, their accreditation may be suspended for up to three months.</p> <p>When you need to suspend an employer's accreditation, use the resources listed and tick the box when you are complete.</p> <p>For more information refer to the Suspension of employer accreditation SOP.</p> <p>When submitted, the suspension request will go to an Immigration Manager for approval. After an employer accreditation suspension is approved:</p> <ul style="list-style-type: none"> • a suspension letter will be sent to the employer • any Job Check applications and Job Tokens related to the employer will be suspended. <p><i>Note - After submitting the suspension request, you should raise a warning against the employer in both ADEPT and AMS. For more information about raising an alert, please refer to the Alerts and Warnings topic.</i></p>	<p></p> <p>Search: Suspend an accreditation</p> <p>ADEPT User Guide Suspending an accreditation</p>	<input type="checkbox"/>
<p>Revoke an Employer Accreditation</p> <p>Revoking an accreditation is done in the same way as described above in Suspend an Employer Accreditation. The only differences with revoking are:</p> <ul style="list-style-type: none"> • You should select the value Revoke in the Recommended sanction field • You should always PPI the employer before revoking their accreditation • The approval will be done by a Head of Office (HOO), and the Immigration Manager will attach the approval decision (email) to the employer revocation. <p>For more information, refer to the Revoke Employer Accreditation SOP.</p> <p>When you need to revoke an employer's accreditation, use the resources listed and tick the box when you are complete.</p>	<p>ADEPT User Guide Revoking an accreditation</p>	<input type="checkbox"/>

SAT Immigration Officers

In this section of this workbook, you will use the live ADEPT system to complete the following tasks using the User Guides and WalkMe to support you:

- Complete a s6(c)
- Complete a RIG assessment activity

 Activity	 Resources	Completed
<p>s6(c)</p> <p>Use the resources listed to complete the task and tick the box once completed.</p>	<p>ADEPT User Guide Special Assessment Team (SAT): s6(c)</p>	<input type="checkbox"/>
<p>Complete a RIG assessment activity</p> <p>RIG assessment activities are only assigned to SAT officers. The purpose of the RIG activity is to:</p> <ul style="list-style-type: none"> • manually check the Risk Indicator Guide • decide if a RAT Referral activity needs to be created (based on the Risk Indicator Guide). <p>Use the resources listed to complete the task and tick the box once completed.</p>	<p>ADEPT User Guide Special Assessment Team (SAT): Assessing a RIG assessment activity</p>	<input type="checkbox"/>

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