ICM 2016

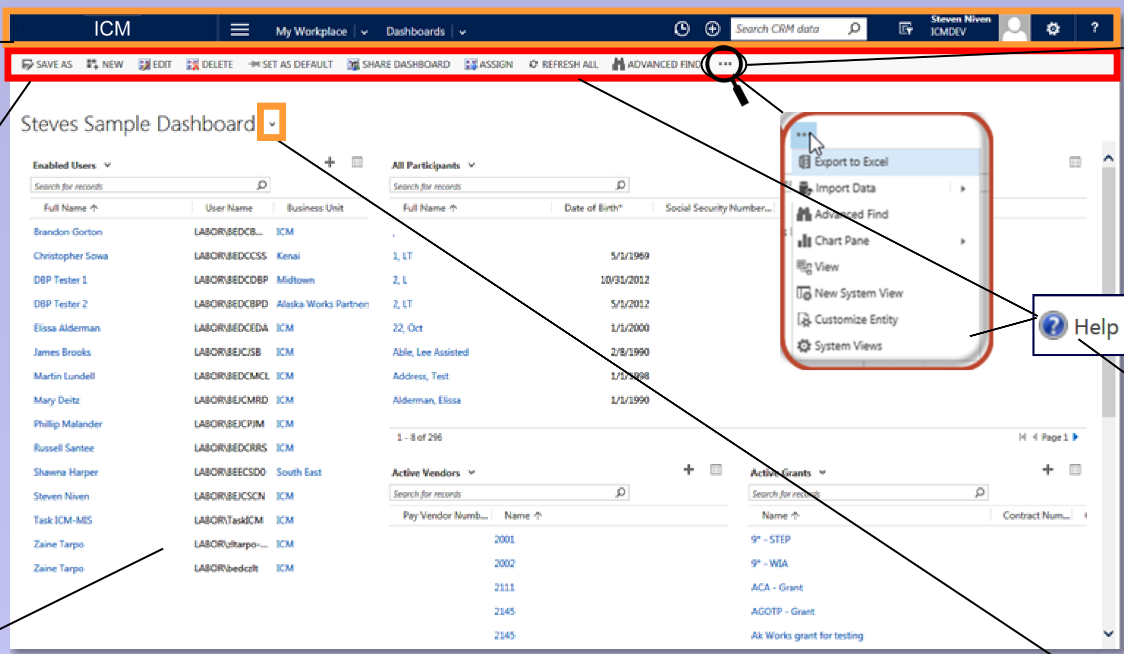
Quick Reference — Case-Based

Getting Started

The 2016 version of Microsoft Dynamics CRM brings a new look to ICM. While much of the functionality has remained the same for ICM, a redesigned, simplified interface puts frequently used commands front and center so you can find what you need when you need it. Detailed guidance, in the form of Help Pages and Topics, can be accessed throughout ICM.

Navigation Bar: This is where you will access the different areas of ICM.

Local Commands: This area contains commands related to the specific area of ICM you are viewing.



More Commands: The top several commands are listed on the bar, and more are found by clicking the ellipses button to the right.

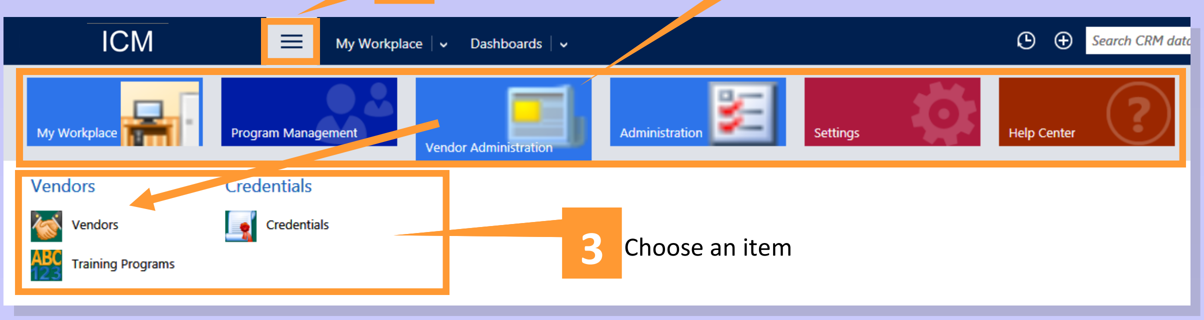
Help: ICM specific help can be accessed by clicking this Help icon. It may be in the Local Commands bar or the More Commands dropdown. It can be seen in, but not limited to, Cases, Enrollments and Services.

Dashboard: When you enter ICM, the main screen is called the Dashboard. Dashboards can contain several **Dashboard Elements**. These Elements and different **Views** contained within the Elements will vary by User as they are customizable. There may be several Dashboards available accessible from the Dashboard dropdown.

Using the Navigation Bar

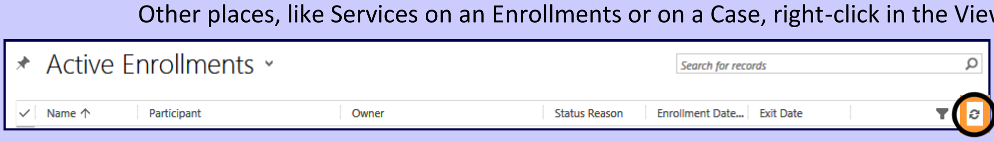
1 Choose the Main menu

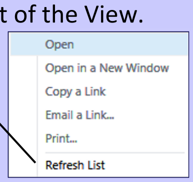
2 Choose a Work Area



3 Choose an item

Refreshing Views: Lists of items in ICM are referred to as Views. Some Views have a refresh option above and to the right of the View. Other places, like Services on an Enrollments or on a Case, right-click in the View and click **Refresh List**.

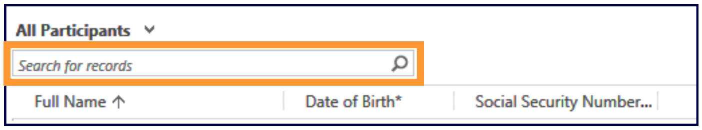




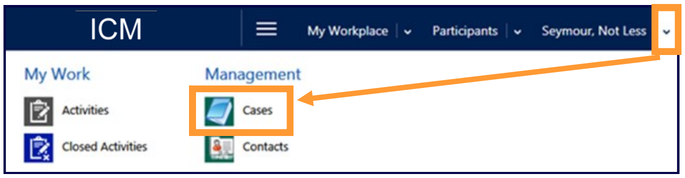
Participant Search or Create

Ensure you collect and report data for the correct person.

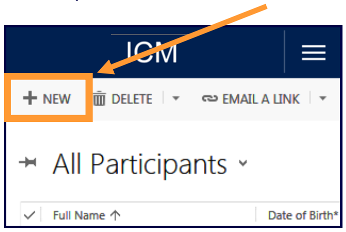
1. In the **All Participants** section of your Dashboard, *Search for records* is used to find your Participant.



If the Participant already exists in ICM, select the Participant and create a Case from the Participant record.

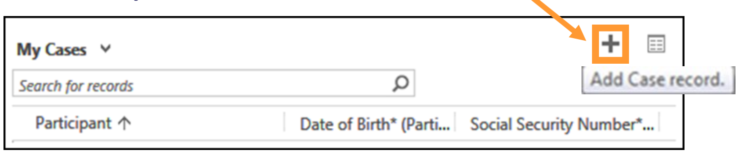


2. If your Dashboard does not contain an All Participants Dashboard Element, or if your search comes up empty, navigate to *My Workplace>Participants* and click **NEW** in the Local Commands.
3. The form which appears will ask for required information and check for duplicates when you Save. If ICM thinks the Participant exists, you will have the option of selecting the existing Participant or continuing to create a new Participant. Otherwise, the full Participant screen will open and you can enter the rest of the information.



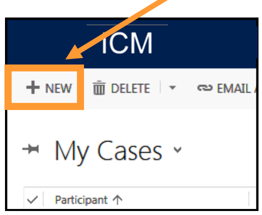
Create a Case

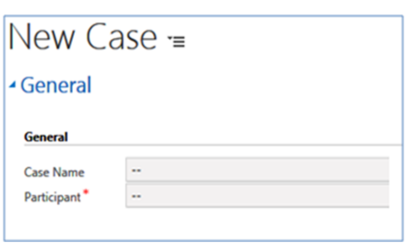
1. In your Dashboard, choose **Add Case record** from the **My Cases** section.



If your Dashboard does not contain a My Cases Dashboard Element, navigate to *My Workplace>Cases* and click **NEW** in the Local Commands.

2. On the form, enter the Case Name and select or create a Participant.





3. Choose **Save** in the Local Commands.

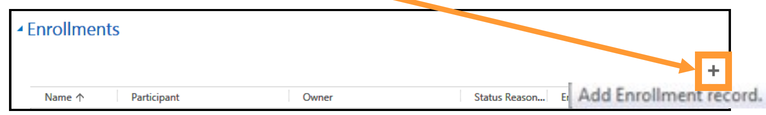
Open an Existing Case

1. Click on the name of the Case for the record you wish to open from the **My Cases** section of your Dashboard.

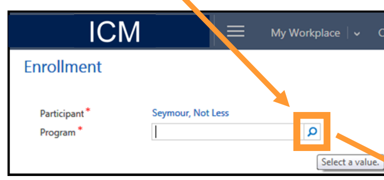
2. Alternatively you can navigate to the My Workplace Work Area, select Cases and click the name of the Case.

Add an Enrollment to a Case

1. To the upper right of the Enrollments section of your Case, choose **Add Enrollment record**.



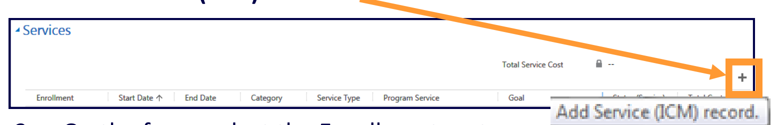
2. Use the lookup to select the Program in which you will Enroll your Participant. **Note**: Only Programs for which your agency has a Grant will appear.



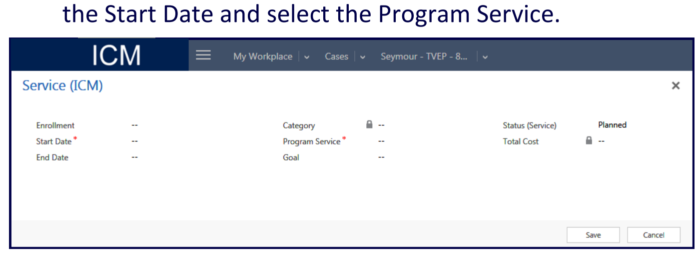
3. Select the Program and click **Save**.
4. The Enrollment form will open. Save, or fill out as much as you like and Save.
5. If enrolling your Participant in more than one Program, return to the Case and add another Enrollment. To return to the Case, click the Case Name in the header of the Enrollment.

Add Services to a Case

1. To the upper right of the Services section choose **Add Service (ICM) record**.



2. On the form, select the Enrollment, enter the Start Date and select the Program Service.

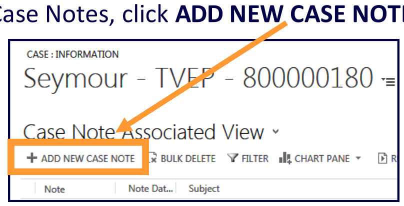


3. Click **Save**
4. If additional information is needed, Service details can be accessed by selecting the Service from within the Case or Enrollment. Either double-click the Service or right-click the Service and select Open.
5. Status changes can be made from the Local Commands within the Service.

Add a Case Note

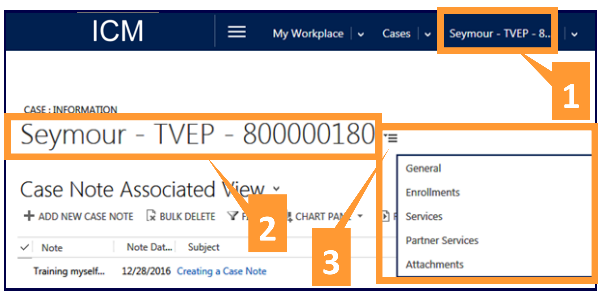
1. While in the Case, from the Navigation Bar, select the dropdown next to the Case Name and select **Case Notes**.

2. Above left of the Case Notes, click **ADD NEW CASE NOTE**.
3. Fill out the form by entering or selecting the required information, then type the Note.



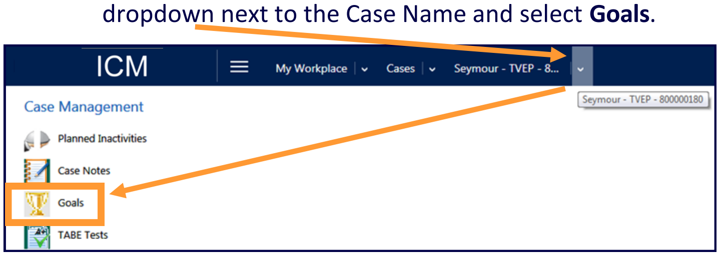
4. Click **Save** or **Save & Close** in the Local Commands.

Note: When you have completed the Case Note and back to the Case Note grid, you can return to the Case by clicking on the Case Name **1)** in the Navigation Bar, **2)** above the grid, or **3)** selecting the dropdown next to the Case Name above the grid and select an area of the Case to which you want to go.

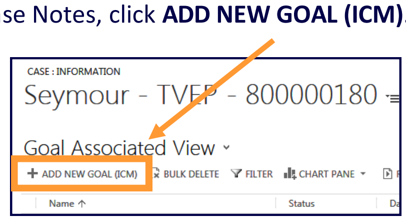


Add a Goal

1. While in the Case, from the Navigation Bar, select the dropdown next to the Case Name and select **Goals**.

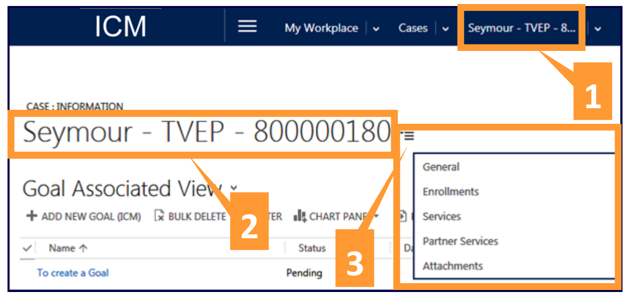


2. Above left of the Case Notes, click **ADD NEW GOAL (ICM)**.
3. Fill out the form by entering or selecting the required information.



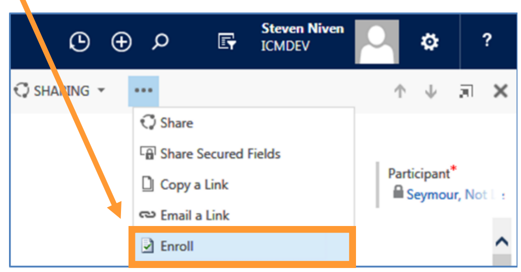
4. Click **Save** or **Save & Close** in the Local Commands.

Note: When you have completed the Goal and back to the Goal grid, you can return to the Case by clicking on the Case Name **1)** in the Navigation Bar, **2)** above the grid, or **3)** selecting the dropdown next to the Case Name above the grid and select an area of the Case to which you want to go.



Enroll the Enrollment

When you have determined the Participant eligible and have completed the Enrollment form and related tasks like Goals and the ISS or IEP, from Local Commands or More Commands select **Enroll** .

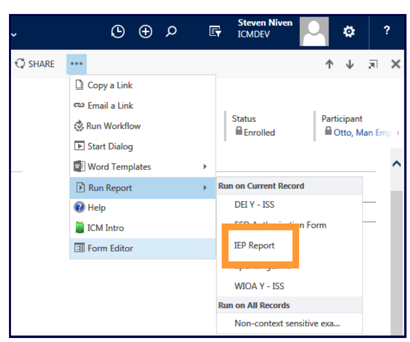


When it is time to **Exit** or **Close** the Enrollment those options will appear here.

Run a Report

Authorizations can be produced from either a Case or Service, whereas an ISS or IEP is run from the Case only. Whether from a Case or a Service, the method used is the same.

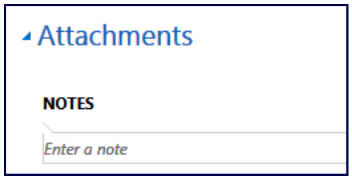
1. Select **Run Report** from Local Commands or More Commands, then select the report to run.

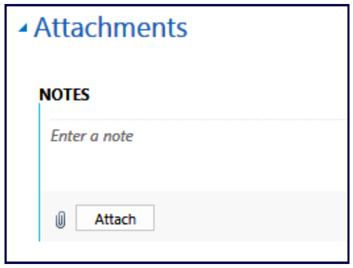


2. In order to print, see the Printing topic in Help, selecting the Internal-User or External-User topic as appropriate.

Add an Attachment

Attachments are added as a part of Notes to the Case.

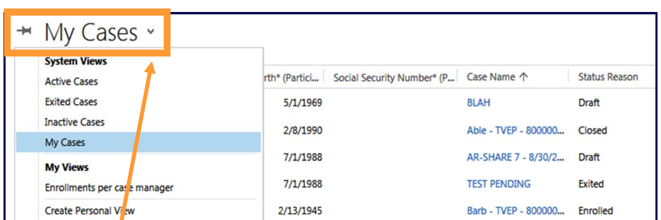




1. In the Attachments section of your Case click in the field that says ***Enter a note***.
2. The field will expand and you can type a note or click **Attach** at the bottom of the field.
3. Browse to and select the file to be attached, then click **Done** at the far right of the Note field.
4. If you want to view the attachment, click on the attachment name and follow the instructions in your browser.

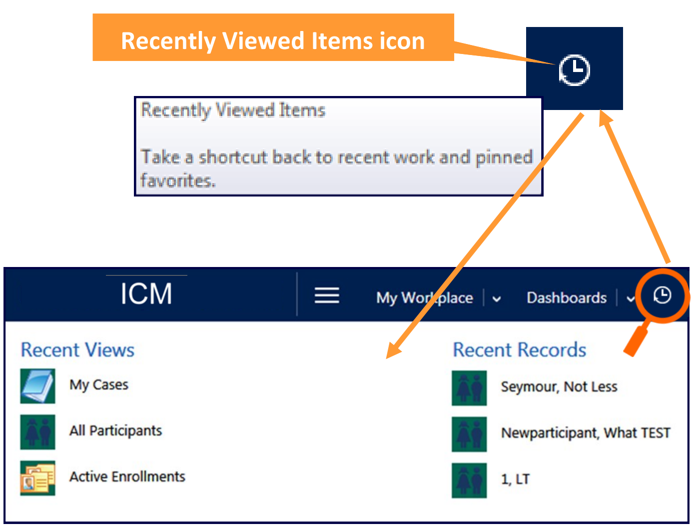
Views

Lists of items in ICM are referred to as Views. For instance, a list of Cases in your Dashboard. The list was configured from different elements of a Case and based on certain criteria. That list is called a View. There can be different Views based on what you need to see. There is no difference in what the View displays regardless of where you accessed the View.



Views accessed in your Dashboard or in the Work Area using the dropdown next to existing View will display the same information.

Records you have recently accessed or Views you have recently used can be accessed by clicking on Recently Viewed Items from the Navigation Bar.

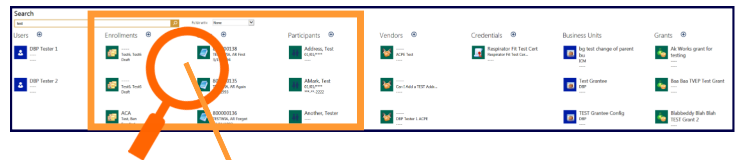


All ICM Search

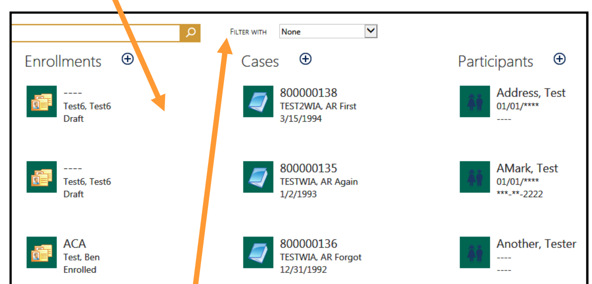
Although you can search for items in their respective Views, you can use the Search feature in the Navigation Bar and have ICM return information for any records meeting the search criteria.

Example: Type the name *TEST* in the *Search CRM data field.*

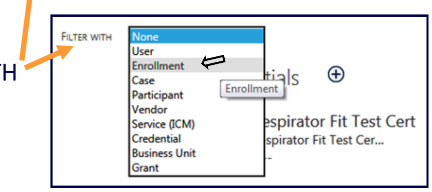
You will see results for many records in ICM like Enrollments, Cases and Participants. Results will vary by User based on which Agency they work for.



There are also results for Credentials, Business Units and Grants, among others (Not pictured here).



You can further refine your results using the FILTER WITH feature.



Tip: If the browser window is too narrow the search field is removed. If you encounter this, drag the window wider.

Looking for Help?

First thing to consider – Have you checked the **Help** system to see if an answer is already provided for your question? Second thing to consider – Is this a Program related question or is it a technical question?

The Technical Unit can help with requests related to use of ICM, but the Program Coordinators and Grants Administrators are your experts for questions regarding the Program in which you are working.

To best assist you if you do require Helpdesk assistance, please see the Help Page **Help Desk Requests**.

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