ICM 2016

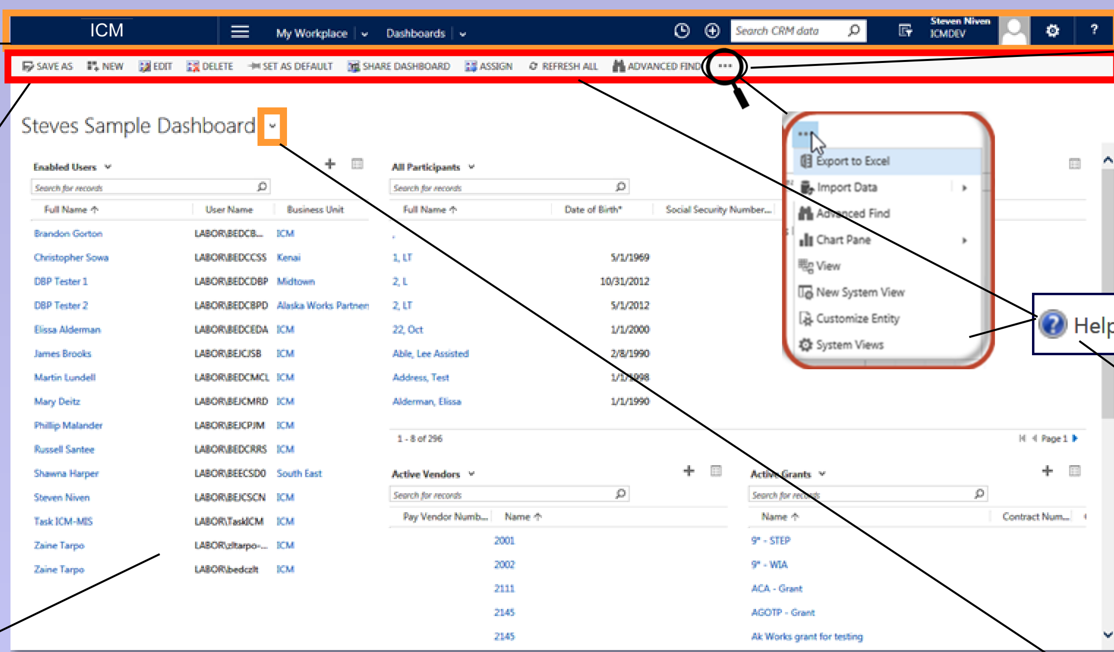
Quick Reference — Non-Case-Based

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 currently viewing.



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

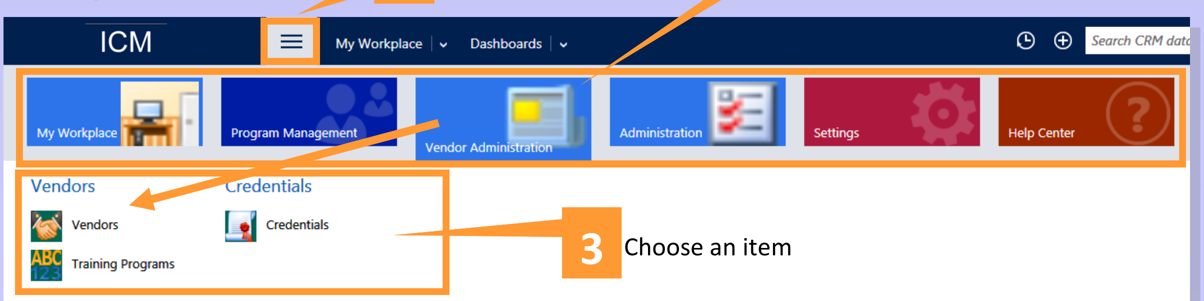
Help: ICM specific help can be accessed by clicking this Help icon. It may be in the Local Commands bar or the More Commands dropdown in, but not limited to, Cases, Enrollments and Services.

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

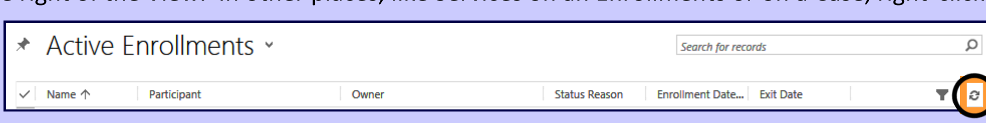
1 Choose the Main menu

2 Choose a work area



3 Choose an item

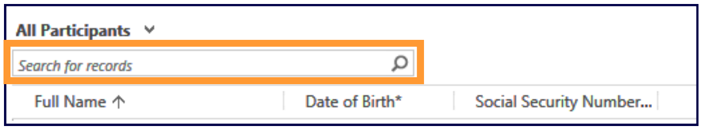
Refreshing Views: Lists of items in ICM are referred to as Views. An example would be a list of Enrollments. Some Views have a refresh option above and to the right of the View. In other places, like Services on an Enrollments or on a Case, right-click in the View and click **Refresh List**.



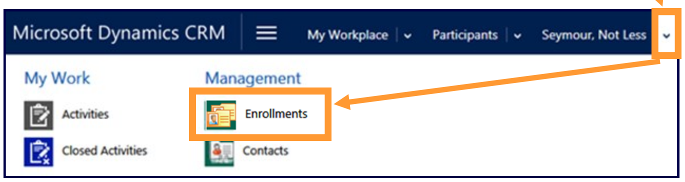
Participant Search or Create

Ensure you collect and report data for the correct person.

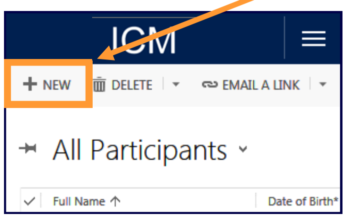
1. In the **All Participants** section of your Dashboard, *Search for records* is used to find your Participant.



If the Participant already exists in ICM, select the Participant and create an Enrollment from the Participant record.

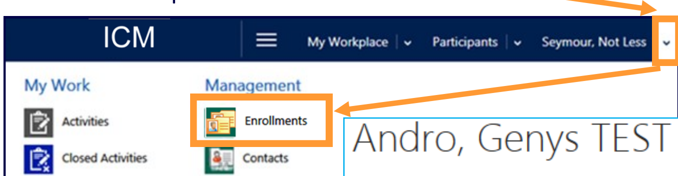


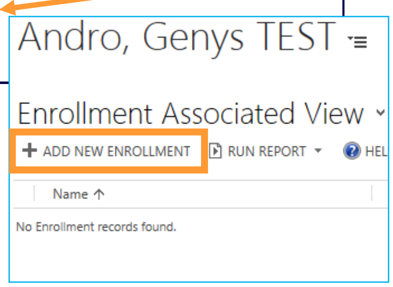
2. If your Dashboard does not contain an All Participants Dashboard Element, or if your search comes up empty, navigate to *My Workplace>Participants* and click **NEW** in the Local Commands.
3. The form which appears will ask for required information and check for duplicates when you Save. If ICM thinks 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.



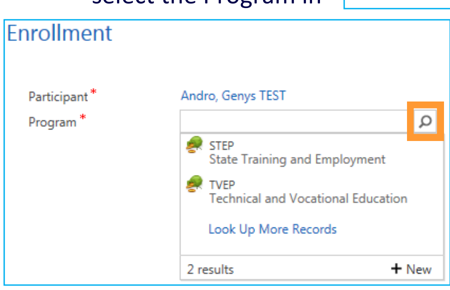
Create a new Enrollment

1. From the Participant record, in the Navigation Bar, click the dropdown and select Enrollments.





2. Above left of the Enrollments, click **ADD NEW ENROLLMENT**.
3. 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.

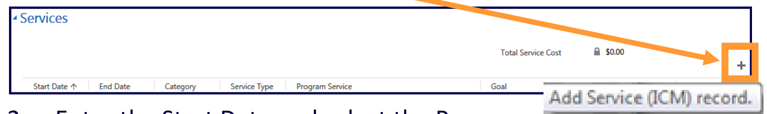


4. Click **Save**.
5. The Enrollment form will open. Save, or fill out as much as you like and Save.

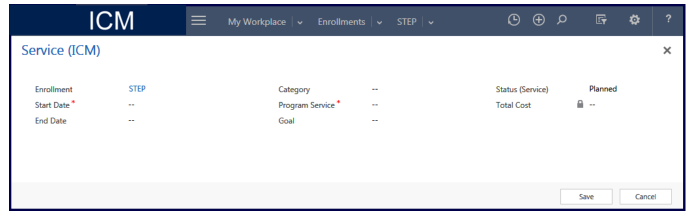
Note: An Enrollment may already exist. See **Access Requests** on Page 4.

Add Services

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



2. Enter the Start Date and select the Program Service.
3. Click **Save**



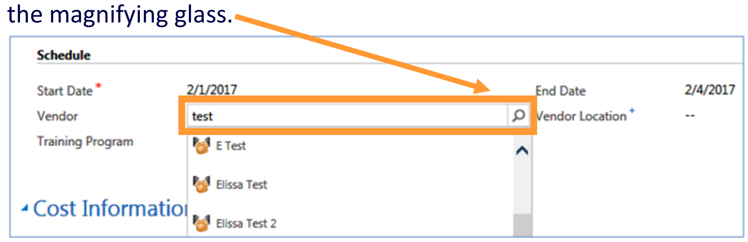
4. Service details can be accessed by selecting the Service from within the Enrollment and either double-click or right-click and Open if additional information is needed.
5. Status changes can be made from the Local Commands within the Service.

Add a Cost to the Service

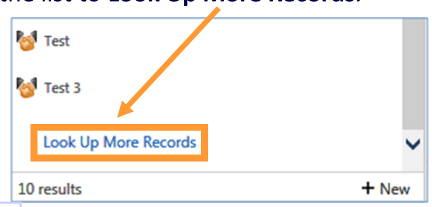
When creating a Service with a cost associated, fill in the *Total Cost* field. If the Cost is unknown, you can enter it at a later time in the Service details.

Select the Vendor from the lookup. If your agency is providing the Service, select your agency as the Vendor.

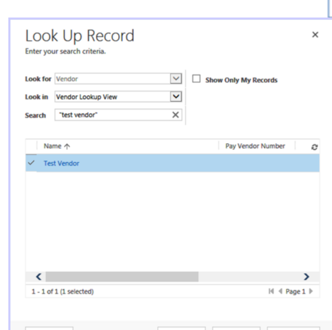
In the Vendor field type a part of the Vendor name and click the magnifying glass.



Possible matches will appear, but if the Vendor is not there, use the option at the end of the list to **Look Up More Records**.



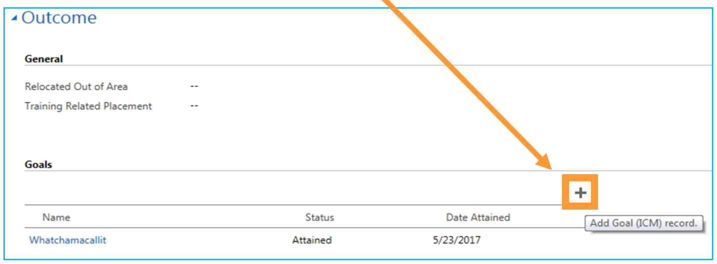
A Look Up Record window will open. Scroll through a longer list of matches or try another search.



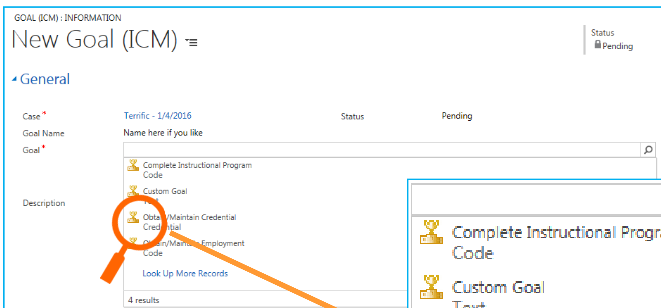
Add a Credential to an Enrollment

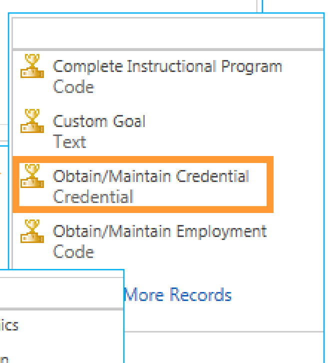
If your Program requires, add **Credentials** using Goals in the Outcome section of the Enrollment. The Outcome section will not appear until the Enrollment has a status of Enrolled.

1. To the upper right of the Goals section choose **Add Goal (ICM) record**.

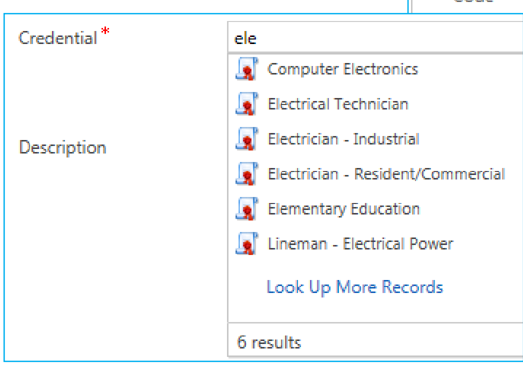


2. When the Goal form opens it will populate a Case Name. You don't need to do anything with this field.
3. Goal Name is not required, but you can give the Goal a unique name if you like.





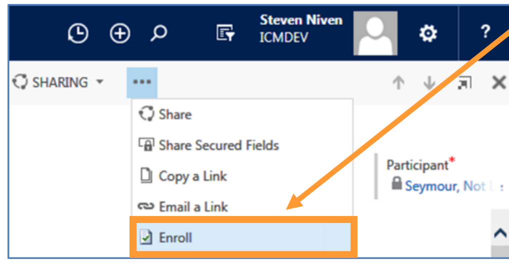
4. Select **Obtain/Maintain Credential** from the lookup.



5. A Credential field will appear. Select the appropriate Credential from the lookup.
6. **Save & Close** and you will see the Goals update in the view on your Enrollment.

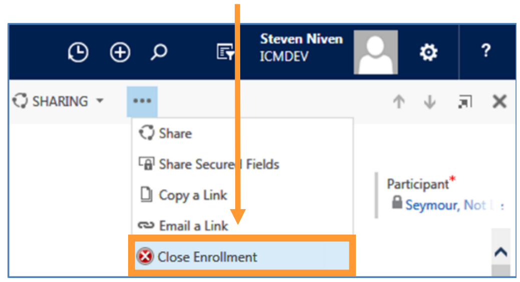
Enroll the Enrollment

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



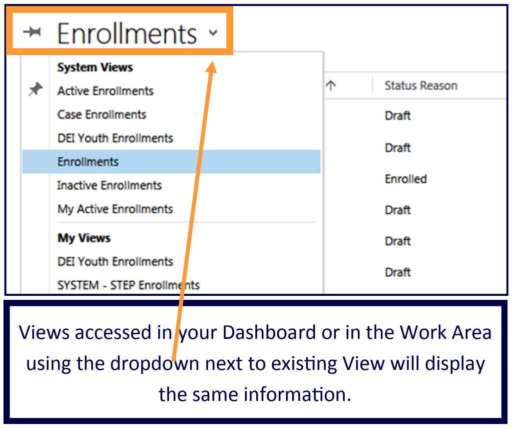
Close the Enrollment

When work is completed on the Enrollment (Services and Goals completed), **Close** the Enrollment.

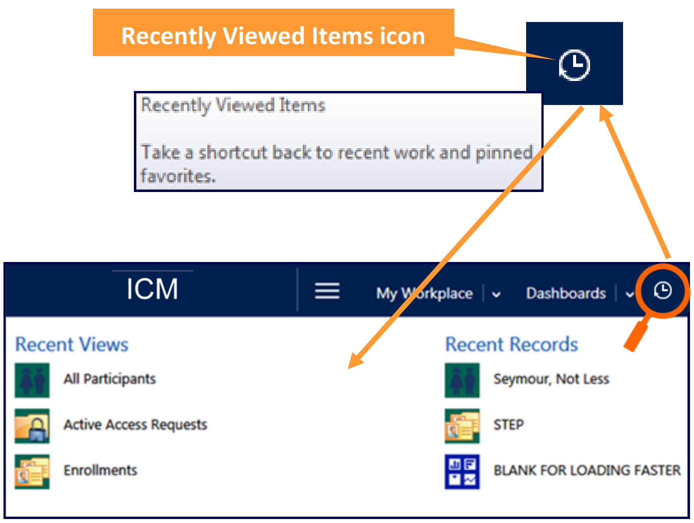


Views

Lists of items in ICM are referred to as Views. For instance, a list of Enrollments in your Dashboard. The list was configured from different elements of an Enrollment 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.



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

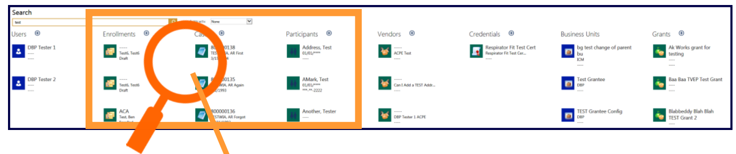


All ICM Search

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

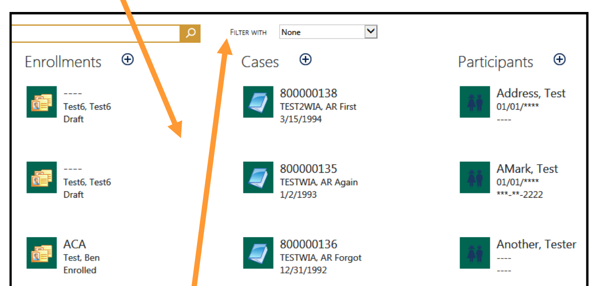
Example: Type the name *TEST* in *Search CRM data* field.

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.

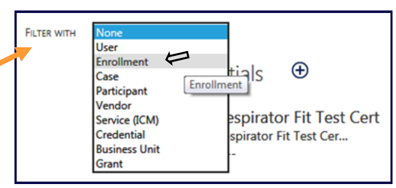


There are also results for Credentials, Business Units and Grants, among others (Not pictured here).

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.



Access Requests

An Enrollment may already exist for the Participant you are attempting to Enroll. The existing Enrollment may be in the same Program or in a different Program.

If the Participant is Enrolled in the same Program at the time you begin an Enrollment, ICM will either add you to the Enrollment or send a request to the owner of the existing Enrollment requesting Share Access. Whether automatically, or with an Access Request to the owner depends on the Program rules. If the existing Enrollment is a different Program, ICM will send a request to the owner of the requesting Co-Enrollment.

More information regarding Access Requests can be found in **Help**.

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**.