State of Alaska Department of Labor

ICM Non-Case-Based

User Guide

Version 1.0
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SOCKEYE

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1. General Interface

The ICM interface contains three main components of each page:

- Command Bar - contains the Navigation Bar and Local Commands.
- Navigation Bar - runs across the top of the window and displays different sections within the application.
- Local Commands - is displayed below the Navigation Bar and displays what options can be selected based on the current page or item a user is on. The local commands are sometimes referred to as the Ribbon.
- ICM Content - is any content below the local commands. The ICM content can house lists of data (views), individual records (forms), and dashboards (charts and views from multiple record types).

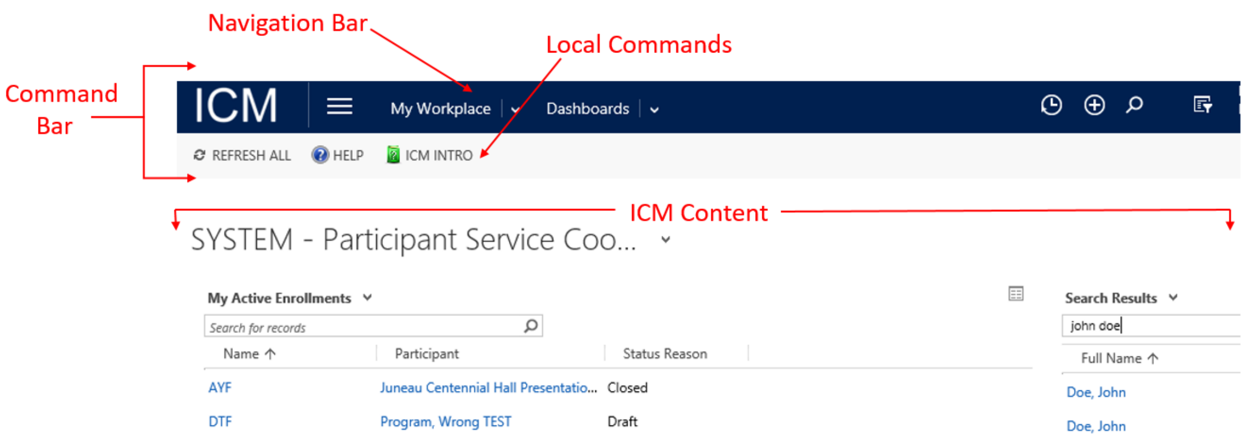

Figure 1 Main components of a ICM page

1.1 Navigation Bar

The Navigation Bar runs across the top of the window and displays different sections within the application. Selecting one of the options on the navigation bar will expand a menu, often referred to as a fly out, and allow users to move throughout the application.

Figure 2 The navigation bar

The hierarchy of the navigation bar navigation goes from left to right: ICM (home) > Work Area Menu > Current Work Area > Record Type > Current Item, and further to the right are Recently Viewed Items, Quick Create (New), Global Search, Advanced Find, the Session Information, Settings, and Help. Below is a detail of each option available in the navigation bar.

Table 1.1: Navigation Bar Overview

Option Name	Functional Description
ICM (Home Button)	
	This will return users to their default home screen, usually the dashboard.
Work Area Menu	
	This is the three stacked horizontal lines to the right of ICM in the navigation bar, from which users can select the Work Area Menu and navigate through different areas of the site. Users can select the dropdown arrow to navigate to the record type to find or in which to enter information.
Record Type	
	The record types available to users will differ depending on the specific area a user has navigated to. Many users will work in the “My Workplace” area. Users can select the dropdown arrow, to the right of the record type, to navigate to recently viewed items within that record type.
Current Item	
	When a user opens a record, that record will be displayed as the last item in this section of the navigation bar. Users can select the dropdown arrow, to the right of the current item, to view related records.
Recently Viewed Items	
	Allows users to easily navigate to the records that they were most recently working with. This Recently Viewed button will show relevant records from any record type.
Quick Create (New)	
	Allows users to quickly create a record without leaving the record that they are currently working on.
Global Search	
	Allows users to search over multiple record types (e.g. participants, cases, or enrollments) and return all relevant records configured for global searching.
Advanced Find	
	Allows users to filter data.
Session Information	
	Displays the current user logged into the system, the name of the system, and, if applicable, a photo.

1.2 Local Commands

The Local Commands are displayed below the Navigation Bar and displays what options can be selected based on the current page or record a user is on.

Depending on which page or record the user is currently viewing, the Local Commands options will vary. Not all options for a particular record are displayed, but More Commands can be viewed by selecting the ellipsis '…'.

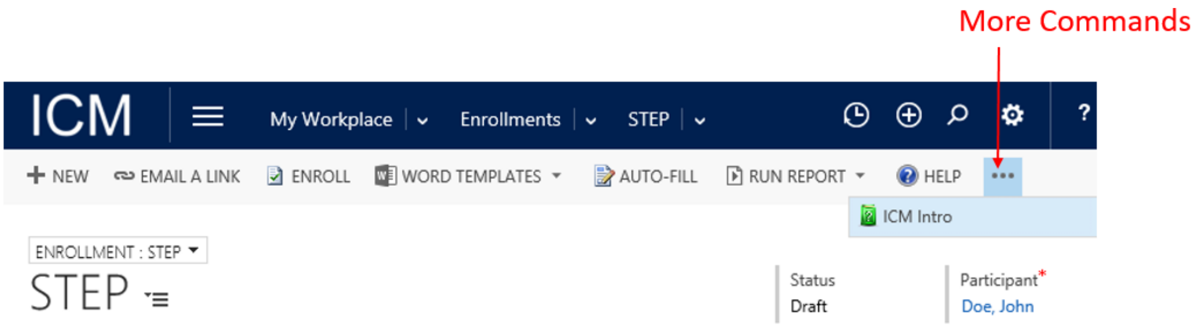

Figure 3 Using the ellipses to view more commands

1.3 ICM Content

The ICM content will vary depending on where the user is while navigating through the system. Some common pages are dashboards, views, and forms.

1.3.1 Dashboards

The default homepage within the system is the default Dashboard. The dashboards are designed to give a quick overview of data elements within the system. Users can view other dashboards using the drop-down arrow to the right of the current dashboard title.

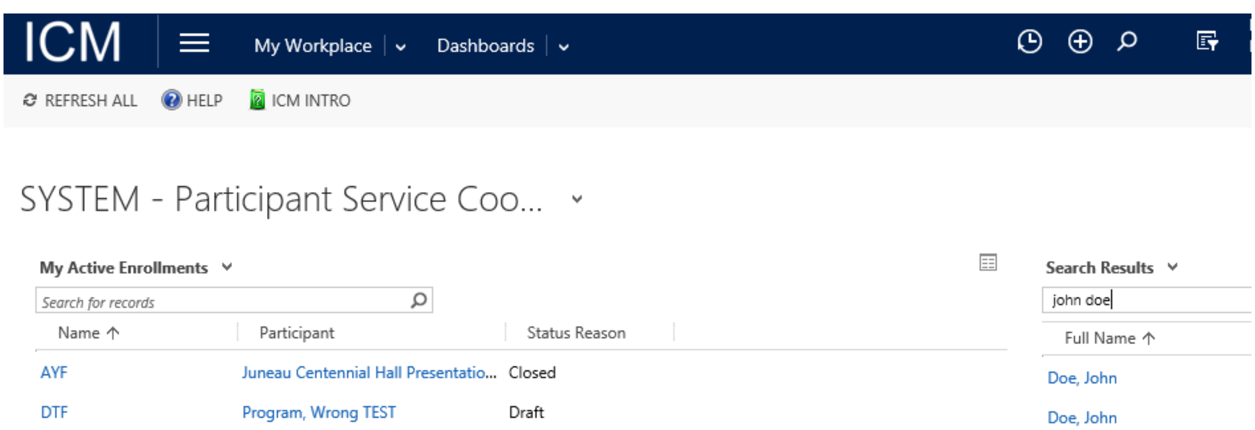

Figure 4 Viewing Dashboards

1.3.2 Views

Views are lists of information formatted in a table or list. When on a view, users will see a Search for Records textbox on the right side above the list. This allows users to search the record type that they are in. For example, if a user were looking at active enrollments, the Search for records would only search and return enrollments. When a user navigates to a record type, the first view is the Default View. To change the view, click the drop-down arrow next to the view name, this will display a list of views that are available to select from.

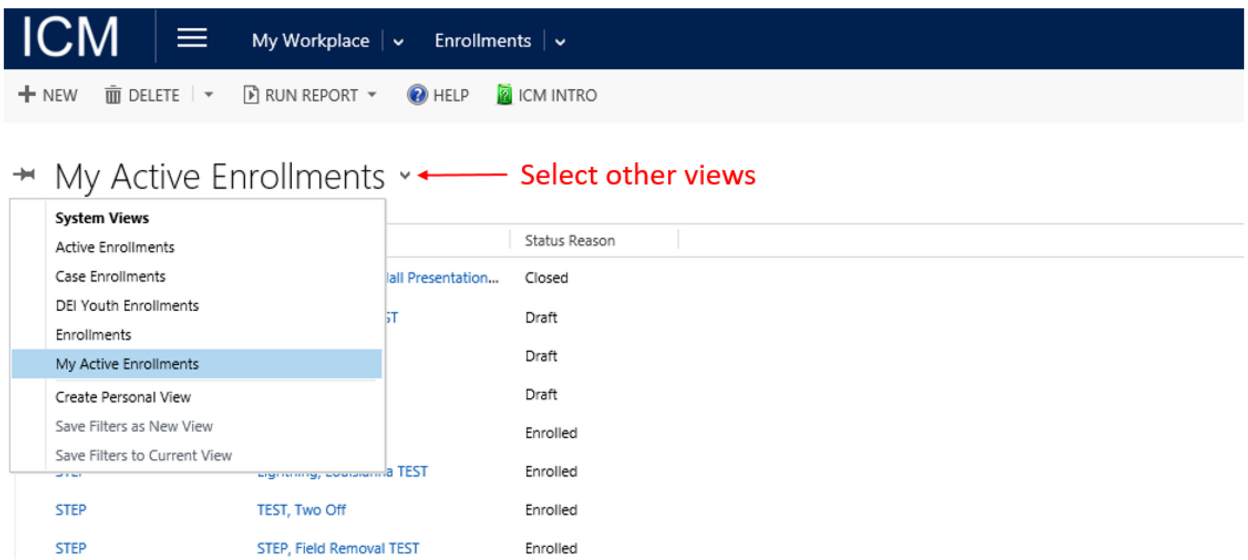

Figure 5 Viewing additional views

1.3.3 Forms

Forms allow users to view, edit, or add information to a record or item. A user can access a record from the selected view by double-clicking the item or right-clicking and selecting **Open**. Clicking a blue link will take the user to the record in the link name. For example, clicking STEP will take the user to the STEP Enrollment as STEP is indicated as the Name of the Enrollment in that column of the view, where clicking Terrific, Tom TEST will take the user to the Participant record as indicated in that column of the same view.

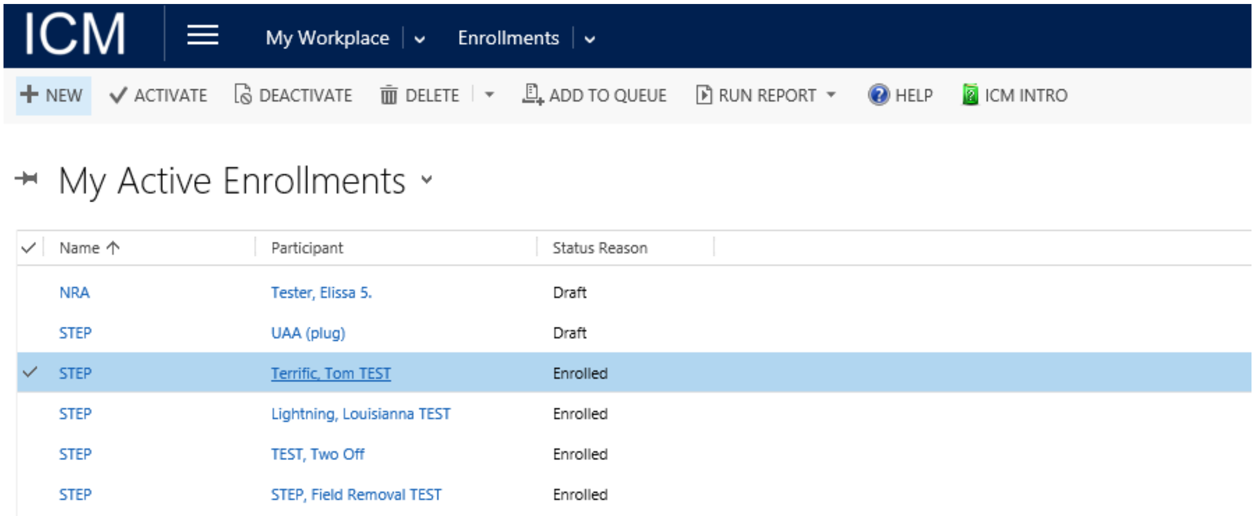

Figure 6 Highlighted Item Selected by the User

Once an item has been opened from the selected view, the current item information will be displayed in the form and the item will also show in the navigation bar to the right of the record type.

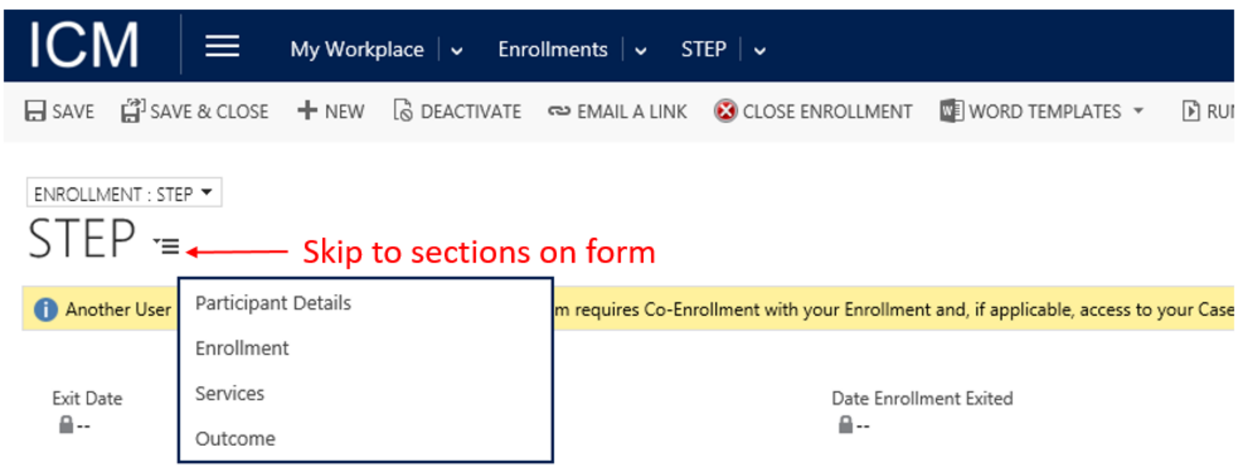

Figure 7 Form and option to skip to specific sections of the form

Once the user is viewing the selected item, the Local Commands can be used to provide the user with more options for that item. Additionally, a user may select the arrow to the right of the form title to skip to specific sections within the form.

2. Non-Case-Based Workflow

The non-case-based workflow is to guide users through the process of enrolling a participant to receive services. The steps within the workflow diagram are broken out into greater detail following the flow or order of the diagram. Non-case-based users should look up and create a participant prior to enrollment.

Please note: the application has multiple ways to get to items and perform certain actions, the steps below are recommended.

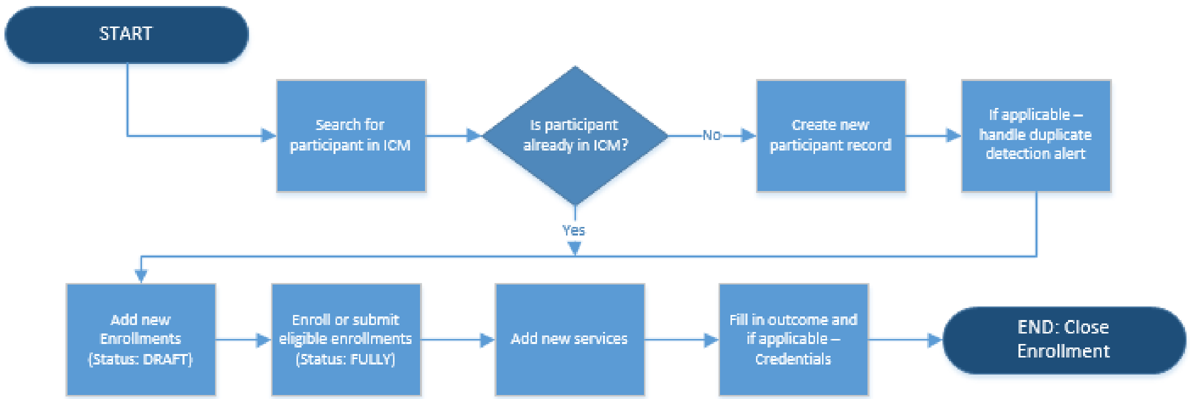

Figure 8 Non-case-based creating participant before enrollment workflow diagram

2.1 Searching for a Participant

2.1.1 Search for Participant using Dashboard

When users log in, the majority will see a dashboard with a participant list and search box. Use the search box directly above the participant list to search for participants. Type the participant full name, last name, or social security number and hit **Enter**. A list of participants matching the search will appear. Double-click the record to open the participant's record. If the participant is not in ICM (in other words, does not show up when you search name and social security number), then a new participant must be created (refer to 2.2).

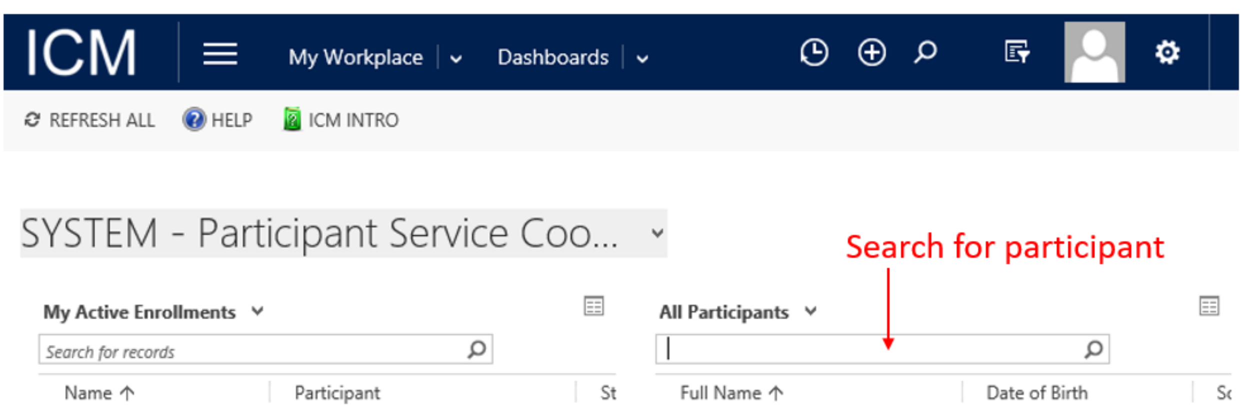

Figure 9 Search for Participant using dashboard

2.1.2 Search for Participant using Global Search

Another option to search for a participant is to use the Global Search in the navigation bar in the top right corner. Type the participant full name, last name, or social security number and hit **Enter**. A list of participants and other records matching the search will appear. Double-click the participant record to open the participant's record. If the participant is not in ICM (in other words, does not show up when you search name and social security number), then a new participant must be created (refer to 2.2).

Figure 10 Search for Participant using Global Search and view of results

2.1.3 Search for Participant using navigation menu item "Participants"

When a user logs in, **"My Workplace"** will be at the top in the navigation bar. If "My Workplace" isn't there, select the Work Area menu ☰ and select "My Workplace". Clicking the drop-down arrow to the right of "My Workplace" will allow the user to select the **Participants** record type. Users will notice a search textbox under the local commands on the right. Type the participant full name, last name, or social security number and hit **Enter**. A list of participants matching the search will appear. Double-click the record to open the participant's record. If the participant is not in ICM (in other words, does not show up when you search name and social security number), then a new participant must be created (refer to 2.2).

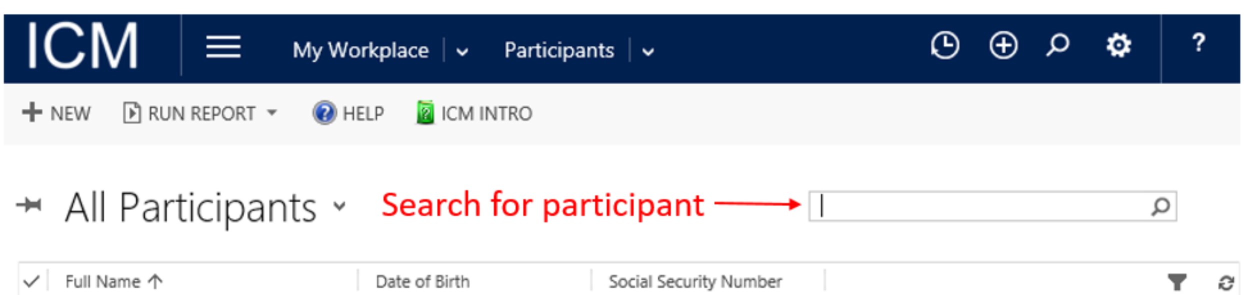

Figure 11 Search for Participant using Participant record type

2.2 Creating a Participant

2.2.1 Create a Participant using navigation menu item "Participants"

When a user logs in, **"My Workplace"** will be at the top in the navigation bar. If "My Workplace" isn't there, select the Workplace menu and select "My Workplace". Clicking the drop-down arrow to the right of "My Workplace" will allow the user to select the **Participants** record type. If a user has already searched for a participant and determines that they need to create a new participant, the user can select the **New** command to create a new participant.

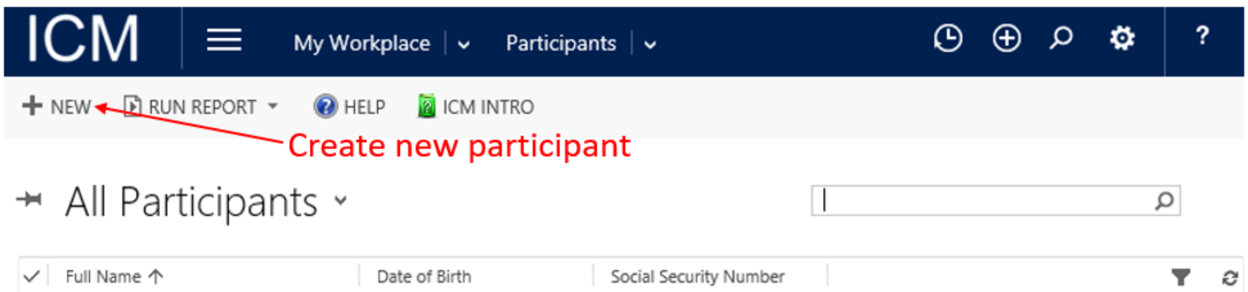

Figure 12 Create Participant using Participant record type

2.3 Handling Duplicate Detection Alert

Users will receive a duplicate detection alert when saving a participant if the participant information is similar to a participant already in ICM. This limits the number of duplicate participants created unintentionally. Users can choose to use the existing participant record or create a new record.

A. **To use the existing participant** record, select the checkbox to the left of the participant's full name and choose **Select**
B. **Create a new participant** by selecting **Create New**

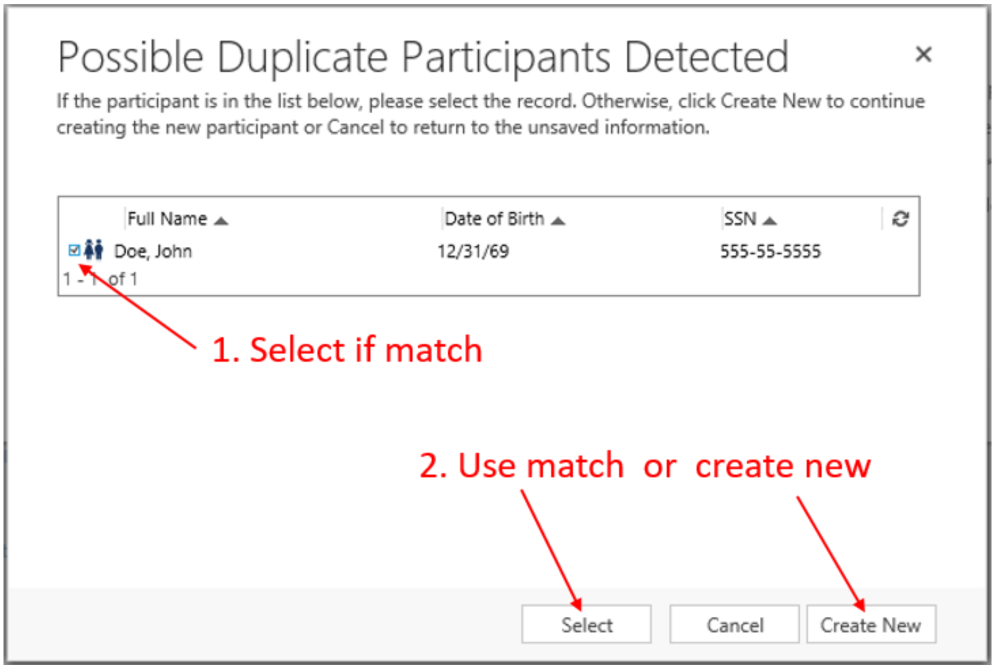

Figure 13 Duplicate detection alert when saving enrollment

2.4 Adding Enrollments

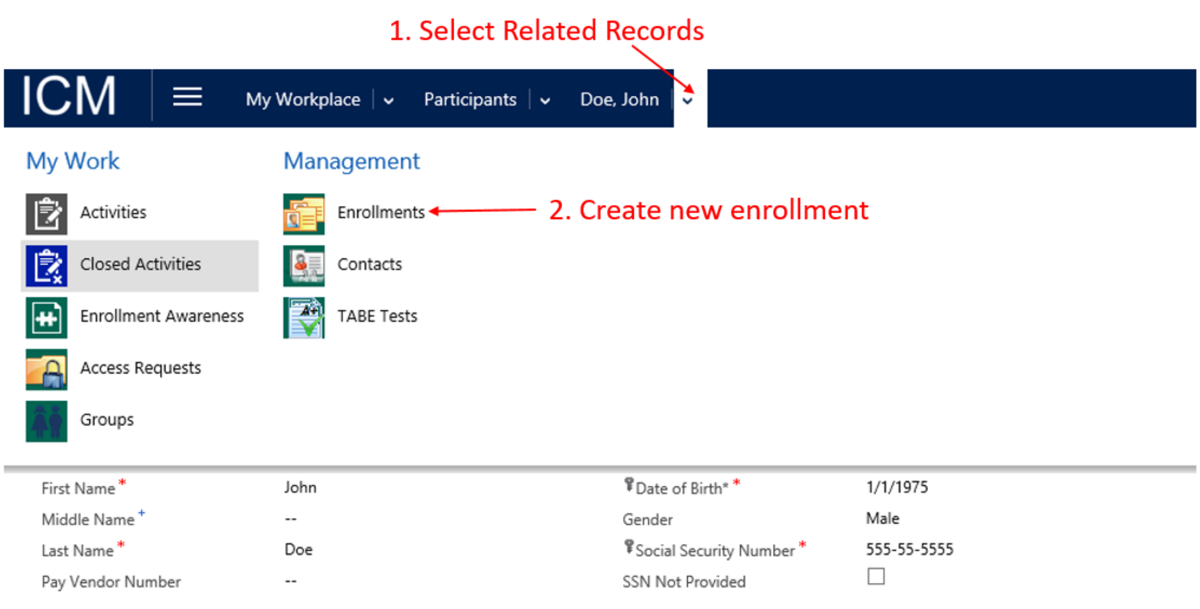

Figure 14 Navigate to related and create new enrollments from the participant in the navigation bar

Non-case-based users should use the following steps to add an enrollment:

1. Navigate to the participant's record, the participant's name will be listed as the current item in the navigation bar
2. Select the dropdown arrow to the right of the current item to view the related record types
3. Select Enrollments, which will show the enrollments associated with a specific participant as well as local commands
4. Select Add New Enrollment
5. Fill in the appropriate information
6. Select **Save**

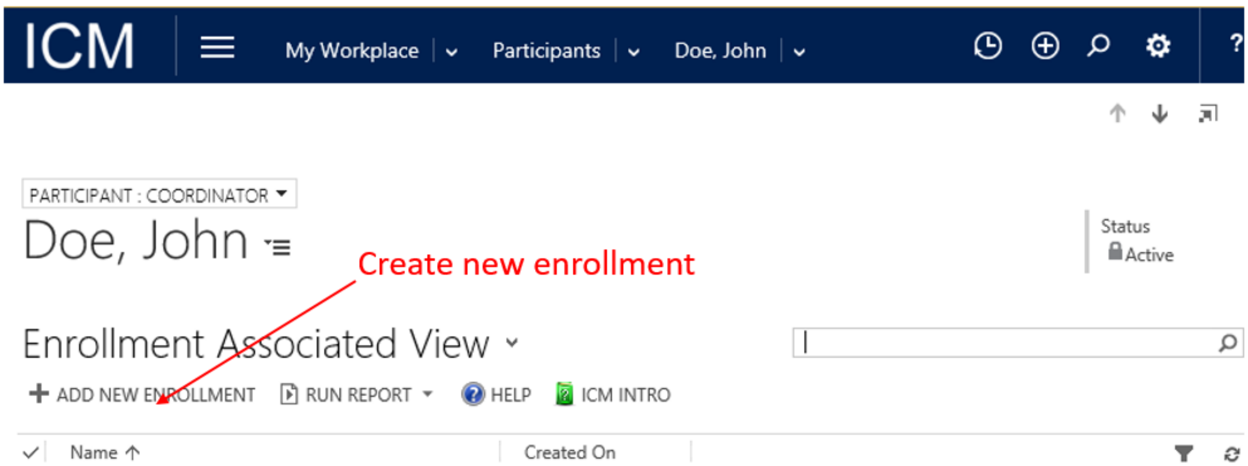

Figure 15 Create new enrollment from the participant in the navigation bar

2.5 Enrolling Eligible Enrollments

Users should use the following steps to enroll an enrollment:

1. Open the enrollment
2. Resolve all issues listed in the yellow notification bar
3. Select Enroll

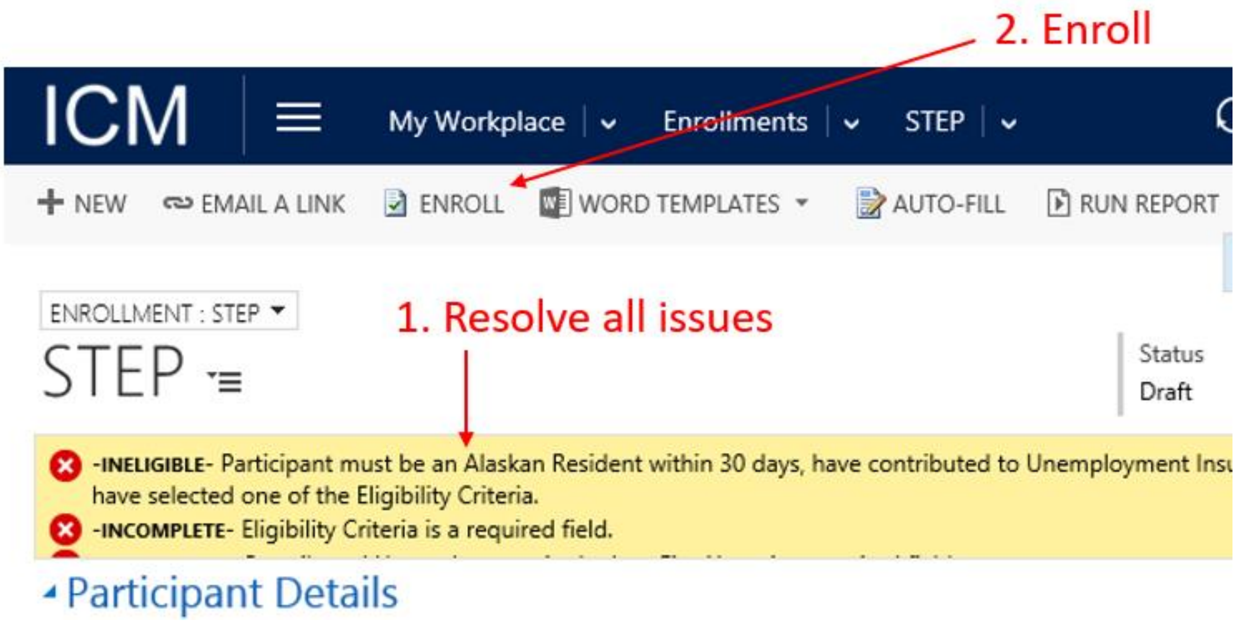

Figure 16 Resolve enrollment data validation and enroll

Once an enrollment is enrolled, the enrollment information becomes locked or unable to be edited.

2.6 Adding Services

Users should use the following steps to add services to an enrollment:

1. Open the appropriate enrollment
2. Scroll down to Services or use the arrow to the right of the enrollment title to skip to Services.
3. Select the + icon to the far right of Services
4. Populate the appropriate fields on the service form

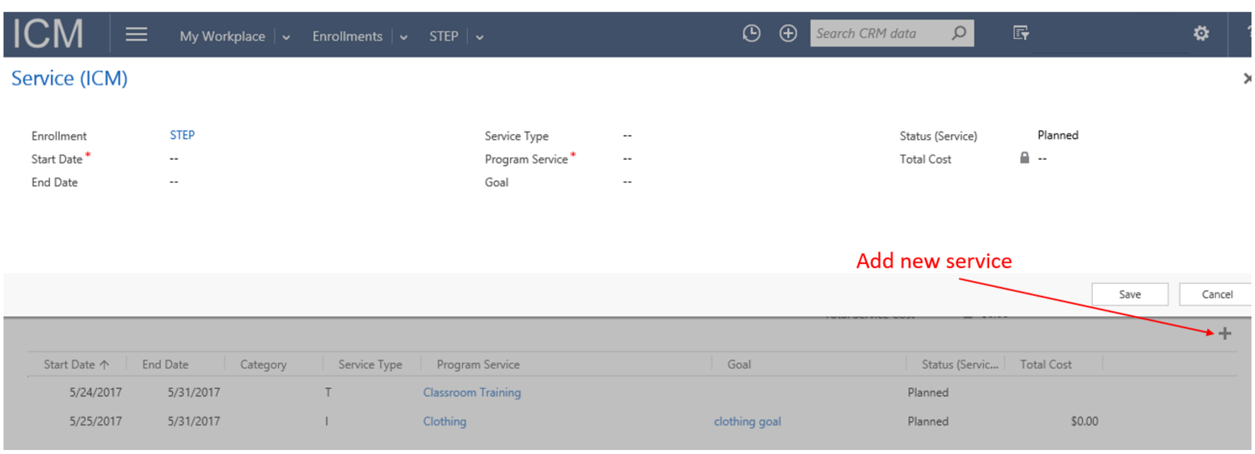

Figure 18 Create new service

2.7 Adding Outcome and Goals/Credentials

Each program has slightly different outcome fields on an enrollment. Users will need to fill out the reporting and outcome section where needed.

Follow the steps below to add information to the outcome section:

1. Open the appropriate enrollment
2. Scroll down to Outcome or use the arrow to the right of the enrollment title to skip to Outcome
3. Enter required information into the outcome section

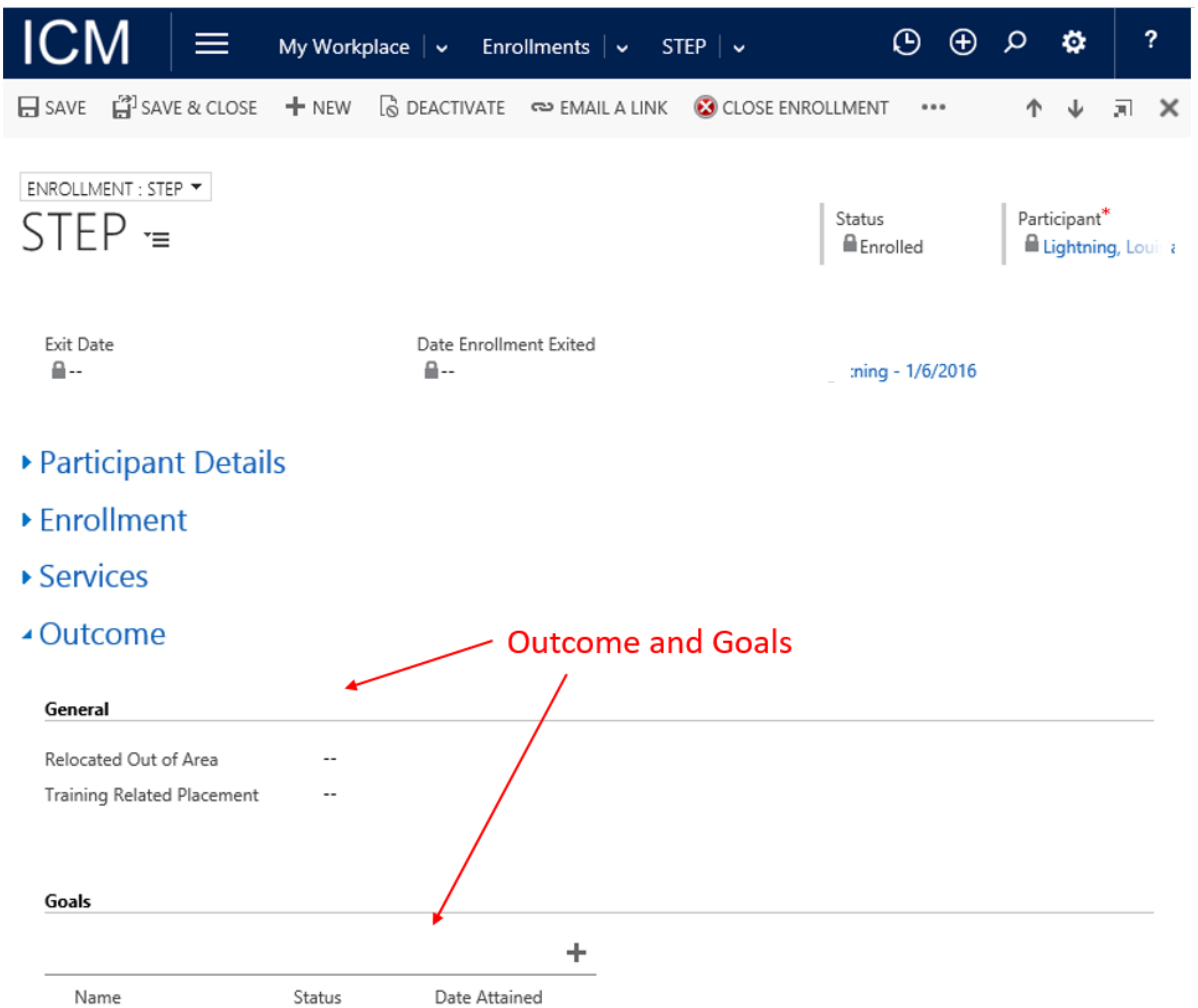

Figure 17 Completing Reporting, outcome and goals

4. Enter Goals/Credentials (if applicable) under the outcome section
    a. Select the + icon to the far right of Goals
    b. Populate the appropriate fields on the goals form
    c. Save

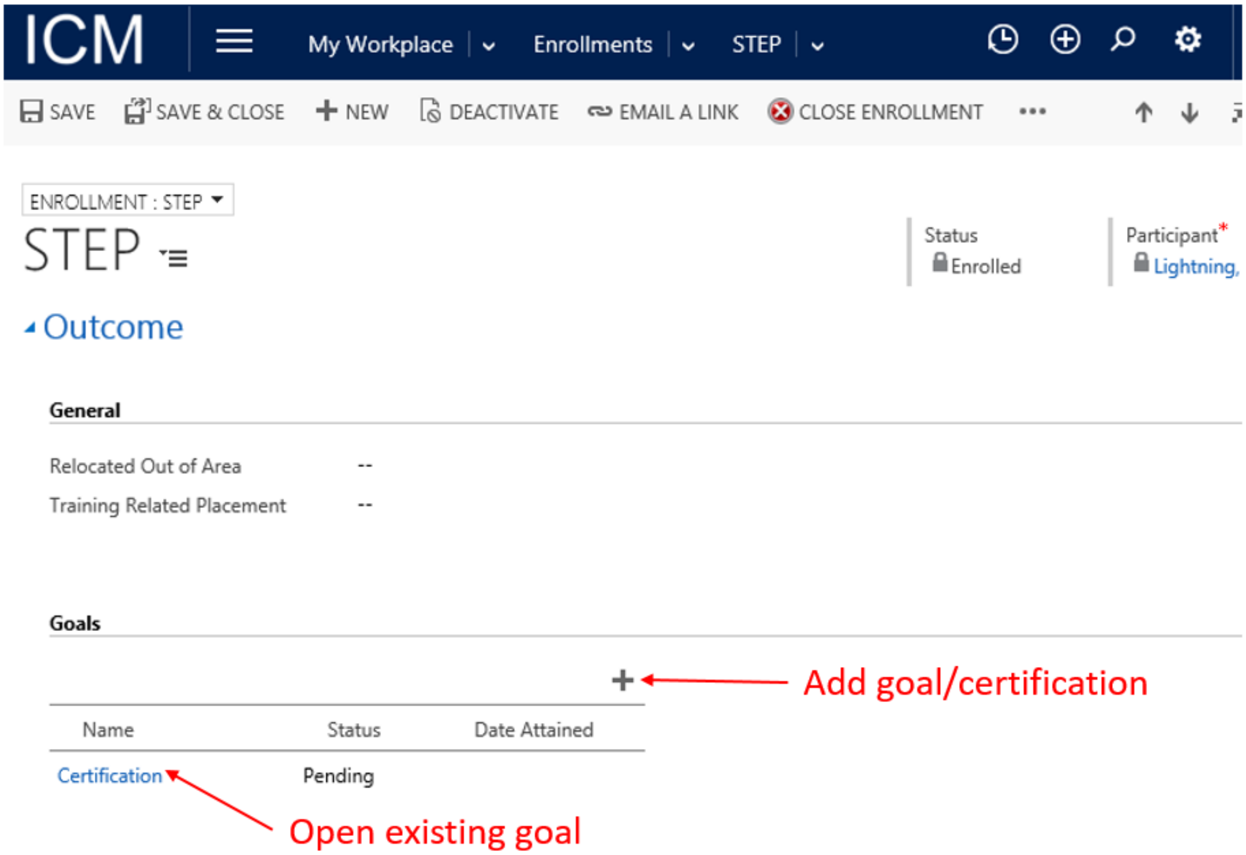

Figure 18 Add or open goals

Goal Tips:

- To open a goal, the user must click the goal name (blue link)
- To delete a goal, the user must open the goal and then delete

2.8 Closing an Enrollment

At some point an enrollment can be closed. Some programs have different waiting periods after the enrollment has been exited, participants stop responding, or the enrollment is no longer needed. Use the following steps to close an enrollment:

1. Open the appropriate enrollment
2. Scroll down to Services or use the arrow to the right of the enrollment title to skip to Services

3. Enter any additional information into services and change the status accordingly (e.g. Completed, Failed).
4. Scroll down to Outcome or use the arrow to the right of the enrollment title to skip to Outcome
5. Enter any additional information into outcome section
6. Select **Close Enrollment**

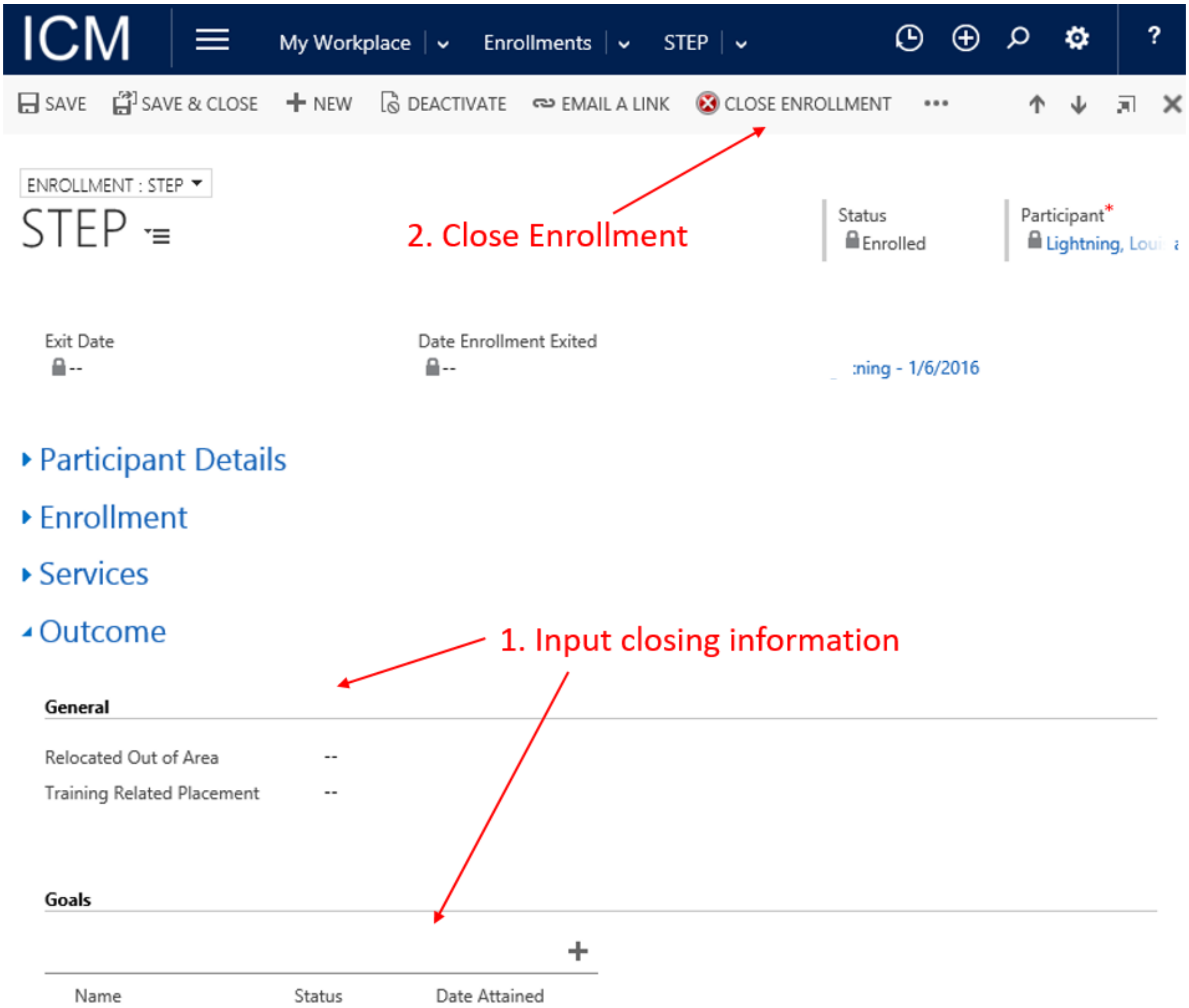

Figure 19 Close Enrollment by completing Outcome section and Close Enrollment