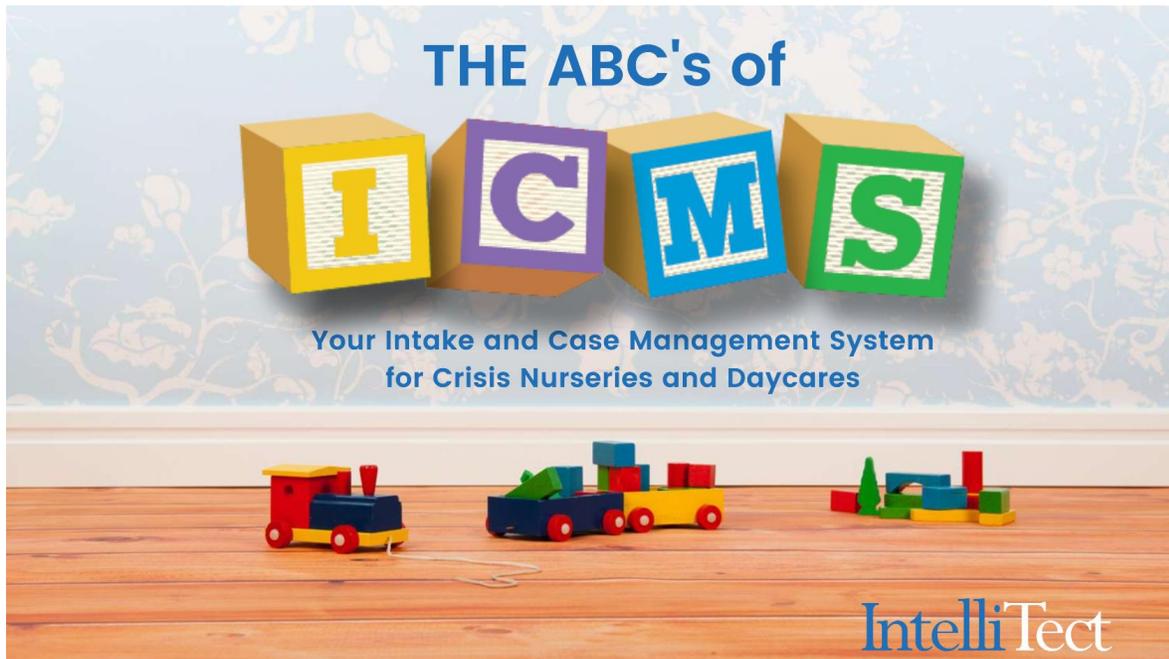


## Implementing ICMS, Step-by-Step



ICMS is an Intake and Case Management System designed specifically for crisis nurseries. The easy-to-use, paperless childcare management system simplifies state-mandated reporting and the manual intake process. Our implementation team works with your leadership and caregivers to have ICMS up and running within your ideal timeframe.

### Getting Started (approximately 2 hours)

When starting an implementation in coordination with IntelliTect, you'll first meet with our team to discuss your organization's specific needs. You'll provide our team with a basic overview of your organization's day-to-day functions. We'll discuss your nursery's location, how many children you care for daily, and your organization's current intake and case management system.

One of our competent ICMS experts will answer any initial questions about the system and then dive into a detailed demo of the system, so your team can see precisely how ICMS operates. We'll demonstrate the entire intake process, from receiving a call to providing essential information needed for state-mandated annual reports. The initial demo of the system takes approximately an hour and includes a complete Q&A to address any questions or concerns.

Following the demo meeting, our implementation consultant will send tutorial videos, the ICMS general info slide deck, and credentials to log in to our ICMS demo site. Our slide deck is a PowerPoint that covers the main features of ICMS, pricing, and benefits of the system. The slide deck summarizes everything you learned during your initial demo meeting with our team so that you feel prepared to discuss ICMS with your leadership team.



When ready, if it's appropriate, send your current intake documents to our implementation consultant so that they can comprise a Gap Analysis for your team. If someone on your team is already assigned to work with your intake information, we'll partner with them to do a faster implementation. The documents can be sent via major document formats.

Once our implementation consultant has sent a Gap Analysis for your review or has worked with your team to identify differences between processes, we'll meet to discuss potential additional features and how we can make ICMS function for your team out of the box. During this meeting, we'll finalize a plan for additional features (if any) and explain how they might look in the system once implemented. We'll determine the MVP (minimal viable product) for your specific nursery and present our options for funding additional features (additional features will be deployed, if necessary, when completed).

If you've decided to include additional features, our team will provide an estimate detailing the expected hours and cost to complete the desired additions.

You can present all the necessary information to move forward with ICMS to your team and decision-makers. When your leadership gives the green light, you'll let our implementation consultant know you're ready to receive the Sales Agreement, Software License Agreement, PSA (Professional Services Agreement), and Work Authorization for any required customizations. You'll receive four requests for signature from Adobe Sign at IntelliTect.

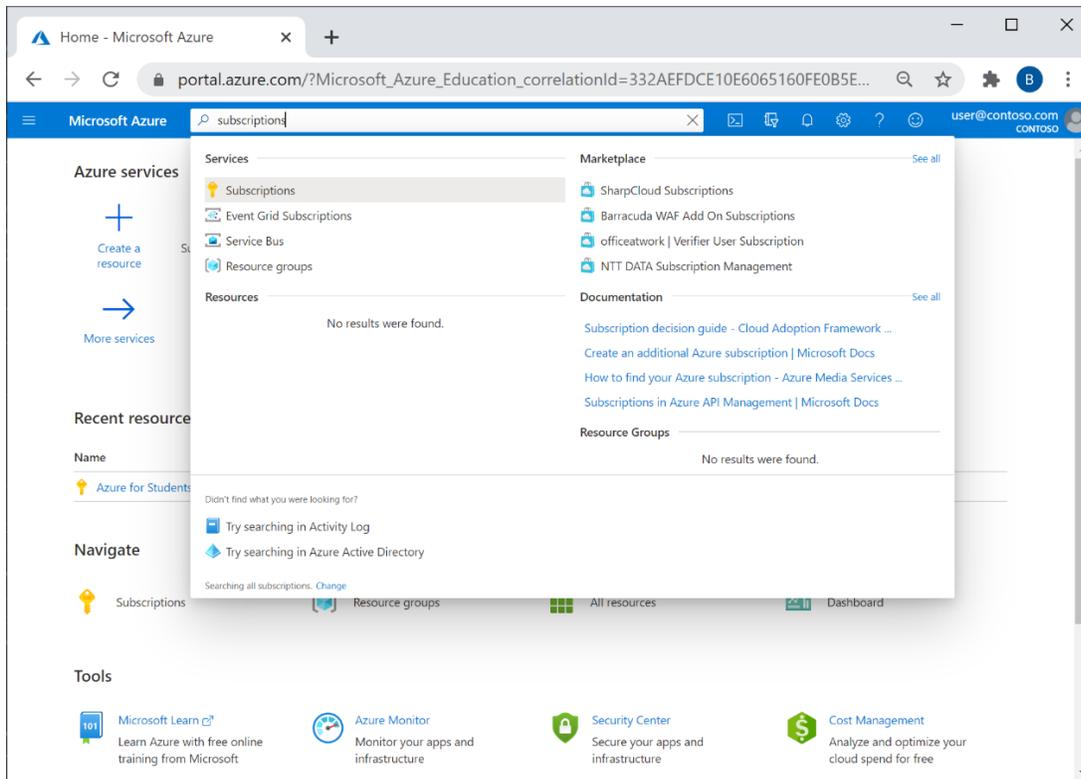
Our team will also send our document explaining accepted payment methods and our W-9, meaning that you will receive six documents in total.

If there are any questions regarding contract details, please reach out to [icmsinfo@intellitect.com](mailto:icmsinfo@intellitect.com).

#### The Basics (approximately 2-3 hours)

Once the contracts are signed, payment is received, and your team has selected the desired date to begin implementation, we'll begin setting up the basics.

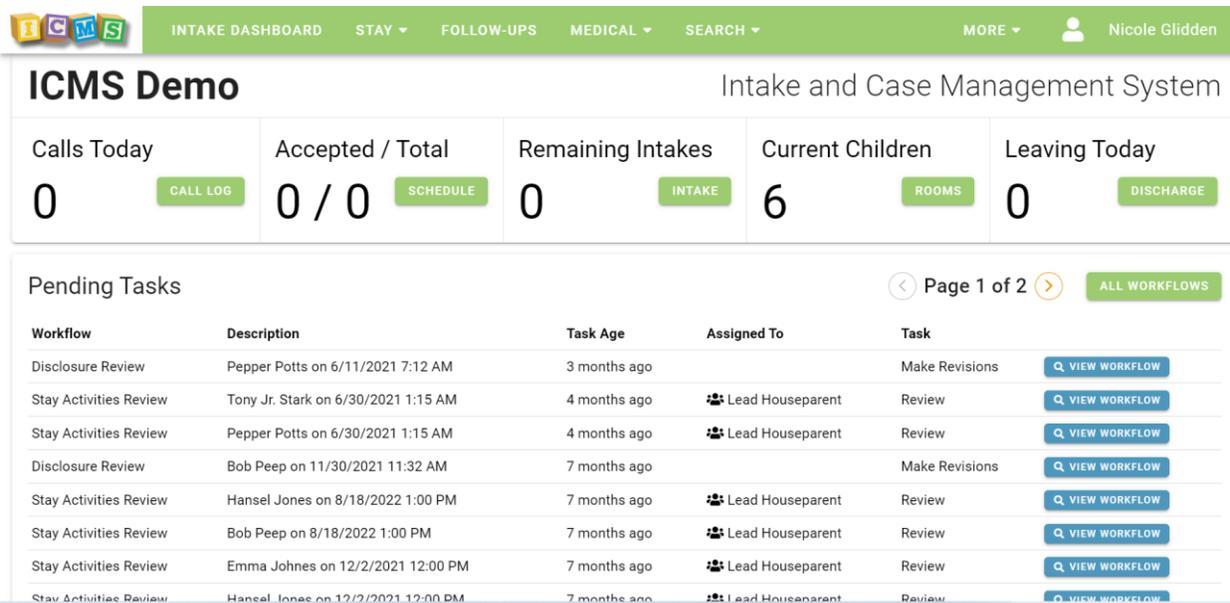




We'll set up an Azure account for your organization (if you don't already have one), as Microsoft gives non-profit organizations \$3,500 (USD) credits to use toward Azure workloads. Your organization's private ICMS application and database will be hosted in Azure, Microsoft's cloud computing service. Your ICMS system will be accessible on-premises throughout your facility and off-premises (for specific users that you can choose). You maintain complete control over your data because it will be hosted in your organization's Azure account. Creating your accounts, verifying that the data in Azure is accurate, and ensuring everything is operating as expected will take about two hours.

Our team will then proceed with the installation of ICMS into your Azure tenant. Your Azure tenant represents your organization and is a dedicated and trusted instance of Azure that belongs to your organization once they register for a Microsoft cloud service. This process takes about two hours from start to finish.





**ICMS Demo** Intake and Case Management System

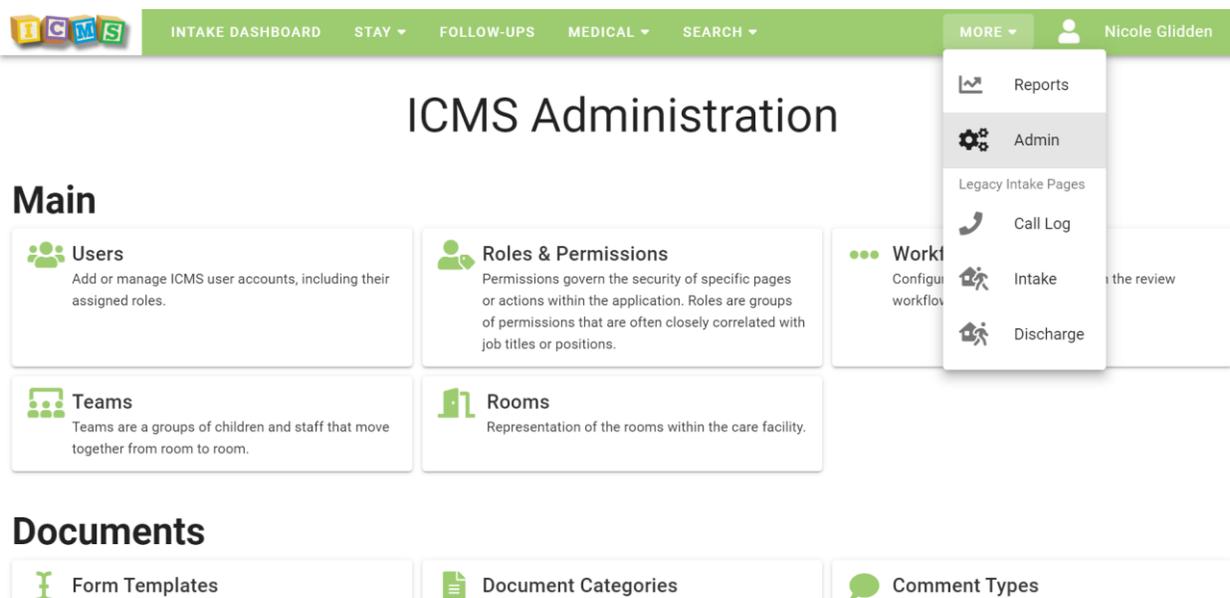
INTAKE DASHBOARD STAY FOLLOW-UPS MEDICAL SEARCH MORE Nicole Glidden

Calls Today <b>0</b> CALL LOG	Accepted / Total <b>0 / 0</b> SCHEDULE	Remaining Intakes <b>0</b> INTAKE	Current Children <b>6</b> ROOMS	Leaving Today <b>0</b> DISCHARGE
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Pending Tasks Page 1 of 2 [ALL WORKFLOWS](#)

Workflow	Description	Task Age	Assigned To	Task
Disclosure Review	Pepper Potts on 6/11/2021 7:12 AM	3 months ago		Make Revisions <a href="#">VIEW WORKFLOW</a>
Stay Activities Review	Tony Jr. Stark on 6/30/2021 1:15 AM	4 months ago	Lead Houseparent	Review <a href="#">VIEW WORKFLOW</a>
Stay Activities Review	Pepper Potts on 6/30/2021 1:15 AM	4 months ago	Lead Houseparent	Review <a href="#">VIEW WORKFLOW</a>
Disclosure Review	Bob Peep on 11/30/2021 11:32 AM	7 months ago		Make Revisions <a href="#">VIEW WORKFLOW</a>
Stay Activities Review	Hansel Jones on 8/18/2022 1:00 PM	7 months ago	Lead Houseparent	Review <a href="#">VIEW WORKFLOW</a>
Stay Activities Review	Bob Peep on 8/18/2022 1:00 PM	7 months ago	Lead Houseparent	Review <a href="#">VIEW WORKFLOW</a>
Stay Activities Review	Emma Johnes on 12/2/2021 12:00 PM	7 months ago	Lead Houseparent	Review <a href="#">VIEW WORKFLOW</a>
Stay Activities Review	Hansel Jones on 12/2/2021 12:00 PM	7 months ago	Lead Houseparent	Review <a href="#">VIEW WORKFLOW</a>

Once ICMS is installed into your Azure tenant, we'll spend roughly two hours navigating how to configure the system to fit your specific needs. As an example, we'll walk you through how to set up your organization's core users during this meeting. We'll also review the various roles and ensure you understand security.



**ICMS Administration**

INTAKE DASHBOARD STAY FOLLOW-UPS MEDICAL SEARCH MORE Nicole Glidden

**Main**

- Users**  
Add or manage ICMS user accounts, including their assigned roles.
- Roles & Permissions**  
Permissions govern the security of specific pages or actions within the application. Roles are groups of permissions that are often closely correlated with job titles or positions.
- Teams**  
Teams are a groups of children and staff that move together from room to room.
- Rooms**  
Representation of the rooms within the care facility.
- Workflows**  
Configure workflow for the review
- Intake**
- Discharge**

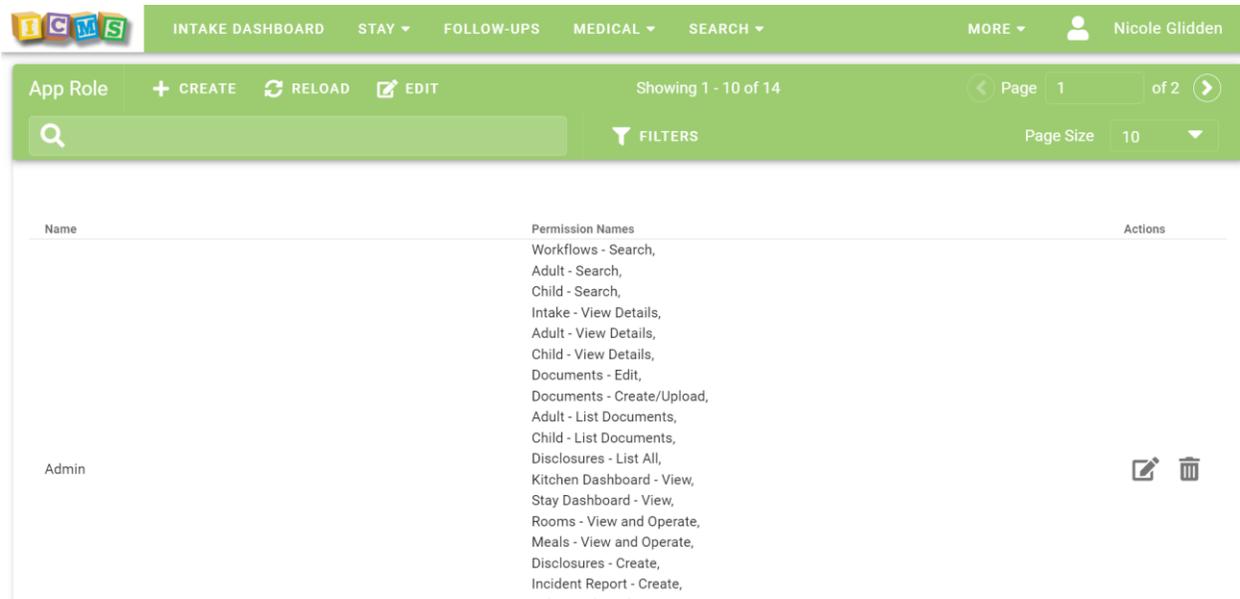
**Documents**

- Form Templates
- Document Categories
- Comment Types

Your team will do the configuration of most of the ICMS system after this meeting concludes. Generally, your team should never need to adjust the settings in Azure. If you believe there is an issue, don't hesitate to contact our implementation team for support.



Next, you'll set up access levels for all staff members. What information and permissions will staff members need to access? What will they see about other staff members? What changes to the system or their profiles will they be able to make within the system? Will they be able to add information to additional sections in the dashboard?



The screenshot shows the ICMS Admin interface. At the top, there is a navigation bar with the ICMS logo, menu items (INTAKE DASHBOARD, STAY, FOLLOW-UPS, MEDICAL, SEARCH), a MORE dropdown, and a user profile for Nicole Glidden. Below this is a secondary navigation bar with 'App Role', '+ CREATE', 'RELOAD', and 'EDIT' buttons. A search bar and 'FILTERS' button are also present. The main content area displays a table with the following data:

Name	Permission Names	Actions
Admin	Workflows - Search, Adult - Search, Child - Search, Intake - View Details, Adult - View Details, Child - View Details, Documents - Edit, Documents - Create/Upload, Adult - List Documents, Child - List Documents, Disclosures - List All, Kitchen Dashboard - View, Stay Dashboard - View, Rooms - View and Operate, Meals - View and Operate, Disclosures - Create, Incident Report - Create,	 

As a reminder, depending on a staff member's App Role, they'll be able to see different levels of information, some more sensitive than others. When you perform a PIN sign-in (usually on a shared computer or tablet), your maximum permissions are those of a houseparent. Anything beyond that (Supervisor, Intake, Lead HP, Director, etc.) requires a complete password sign-in. Team members with the appropriate permissions can enter their PIN to log back into the system and continue with their desired tasks.

After you've set up your team's permissions, you can explore the remainder of the Admin section of the system. Here, you'll find information on Adult Follow-ups, Demographics, Meals, Allergens, Intake Lists, Stay Lists, Resources, and other data that pertains to the technical workings of ICMS.



The screenshot shows the ICMS Intake Dashboard. The top navigation bar includes 'INTAKE DASHBOARD', 'STAY', 'FOLLOW-UPS', 'MEDICAL', 'SEARCH', 'MORE', and a user profile for 'Nicole Glidden'. The main content is divided into two sections: 'Demographics & Adults' and 'Stay & Children'.

**Demographics & Adults**

- Relationship Type**: The available relationships between adults and children, or adults and their emergency contacts.
- Follow-up Resources**: The available resources to choose when recording an Adult Follow-up. E.g. specific housing support or childcare agencies.
- Resource Types**: Categories for Resources, used for reporting.
- Education Level**
- Ethnicity**
- Race**
- Gender**
- Income Level**
- Referral Type**

**Stay & Children**

- OTC Medication**: Available types of OTC medication that can be administered after parental consent is obtained.
- Stay Activity**: Activities that can be recorded for children on the Rooms pages.
- Stay Activity Category**: Groupings of stay activities for organization when choosing an activity to record.
- Watch Types**: <https://icmsdemo.azurewebsites.net/admin/Ethnicity?pageSize=100>
- Behavior Report Situations**: Situations that can be selected in child behavior.

You will need to have your signature forms, disclaimers, and other vital documents ready in any widely accepted digital form, so our team can add them to the system. Our implementation team will need additional time after the configuration sessions to finalize adding all configuration items like (activities, food, allergens, over-the-counter meds, etc.).

[Prepare for Rollout \(approximately 3 hours w/IntelliTect\)](#)

When you're ready, we'll spend about an hour in a Go Live planning meeting, where we'll schedule training sessions, finalize a date to launch the system, and answer any questions regarding going live with ICMS. During the Go Live planning meeting, feel free to ask for clarification on any of the steps you've taken up to this point in the implementation process.

You'll then meet with our implementation team for Training Session #1, a two-hour training session where we'll train your organization's leadership team on how to use ICMS effectively. We'll walk through the entire ICMS process in real-time and demonstrate how to effectively use the system for intakes, meal tracking, activity notes, medical information, reporting, and much more. Our goal in this initial training session is to train your trainers, so they feel equipped to train their team successfully.

Once you've asked all your questions and your leadership team feels comfortable operating the system on their own, we'll leave you to train the rest of your staff on how to use ICMS. If any questions or complications arise during this time, please reach out to our implementation team for support ([icmsinfo@intellitect.com](mailto:icmsinfo@intellitect.com)).

Next, your leadership team will contact us to organize Training Session #2, where our implementation team will provide additional training based directly on your feedback from training your team. Is there anything we didn't cover in prior sessions? Does your team need



more guidance on taking down medication information? Is a drop-down not working as expected? Not sure how to use an open comment box? Does the workflow need clarification?

You'll use Training Session #2 as an opportunity to refine your internal processes and make sure your team is equipped to succeed. Once you've asked all your questions and you feel comfortable operating within the system on your own, our implementation consultant will mark the implementation as complete.

#### After Rollout (1 hour)

Following implementation, we'll address any critical issues as they arise, meaning that you should contact us immediately if something isn't working correctly. We're always around to solve any issues that arise and would love to help you fix these complications as soon as possible.

After one week of use, our team will spend thirty minutes reviewing your experience and making sure the system is working as needed. We'll repeat this meeting after a month of use to verify that everything is running smoothly and that your team is thrilled with ICMS as their intake and case management system.

After ICMS is successfully implemented and your team feels confident using the system, IntelliTect removes direct involvement.

Of course, we'd love to hear from you anytime with comments, concerns, or questions about the system. We're available for technical support or assistance with training throughout the time your organization actively uses the system.

Our implementation team can be reached at [icmsinfo@intellitect.com](mailto:icmsinfo@intellitect.com).

