

CFS application environment summary

From: M Bret Blackford (bret_blackford@yahoo.com)

To: emcpherson@cfserve.org

Cc: bret_blackford@yahoo.com

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Eric,

One more quick email ahead of the full Christian Family Services (CFS) IT environment review.

Attached is a brief summary of key applications currently in use at CFS. Overall, this appears encouraging. CFS seems to be relying primarily on cloud-based applications, which generally shifts much of the hardware, patching, maintenance, and resiliency burden away from CFS and onto the software vendors. Based on what I have seen so far, there does not appear to be much that is immediately actionable in this area, so this attachment is mainly for your background and reference.

One related area that does deserve attention, however, is user-access governance. At a minimum, I believe CFS should have procedures to periodically review and approve access rights to key applications—at least annually—to help ensure that only current employees and authorized contractors retain appropriate access. There should also be clear procedures for approving access when new employees are onboarded and for promptly removing or adjusting access when employees or contractors leave or change roles.

We can discuss possible procedures as part of the broader IT review.

--- Bret



CFS_ApplicationEnvironment.pdf
70 KB

Christian Family Services (CFS)

Application Environment Summary

Working observations based on screenshots and application notes reviewed on March 20, 2026, including indications that Microsoft 365 / Outlook is used for email, OneDrive is used for file storage or sharing, and QuickBooks Online is used for bookkeeping.

Overall assessment: CFS appears to rely primarily on cloud-hosted business applications rather than an on-premises application server. This is favorable for resiliency and future network migration work. Screenshots also indicate organizational email use tied to the cfsserve.org domain and QuickBooks Online for bookkeeping. Remaining questions center on the exact email platform, identity management, file storage, printing/scanning, and any legacy local dependencies.

Observed application environment

- Observed platforms include ICANotes, Inovalon / Provider Cloud, FocusEDI, Silo, Dashlane, and QuickBooks Online. The screenshots also indicate that Microsoft 365 / Outlook is used for email and that OneDrive is used for file storage and/or sharing.
- The visible use of the Microsoft 365 admin center, Outlook-related screens, and OneDrive suggests CFS is using Microsoft 365 services for communication, user account management, and at least some document storage / sharing.

Application	Likely role	Observation
ICANotes	Behavioral health EHR / charting	Browser-based access appears to be in use.
Inovalon / Provider Cloud	Claims, eligibility, and billing	Supports payer / claims processing through a web portal.
FocusEDI	EDI / billing portal	Another browser-accessed revenue-cycle tool.
Silo	Separate cloud portal	Observed as a web-based system; purpose should be confirmed.
Dashlane	Password management	Positive sign of centralized credential management.
QuickBooks Online	Bookkeeping / accounting	Browser tabs indicate QuickBooks Online is in use for accounting functions.
Organizational email	Email / communication	Screenshots show accounts using the cfsserve.org domain; exact email platform should be confirmed.

Why this is encouraging

- Core applications appear reachable through standard web browsers rather than a local application server.
- This reduces the risk that one aging on-site device would disable major operations.
- A cloud-centered stack should make future network cleanup or migration easier, assuming reliable internet.
- Dashlane suggests better password control than informal local storage, and the screenshots also point to an organized cloud-based credential environment.

Items still to confirm

- Whether user logins still depend on local Active Directory or another on-site identity system, even though most core applications appear cloud-based.
- Whether all shared files have been fully moved into OneDrive / Microsoft 365, or whether some data still lives on local PCs or a local file server / network share.
- Whether printers, scanners, or specialized devices depend on local server functions.
- Whether any shortcuts, mapped drives, or legacy processes still point to local resources rather than cloud services.
- How backups are handled for any remaining local data, and whether email / accounting data retention is managed entirely by cloud providers.

Bottom line: CFS appears to have a mostly cloud-based application environment, including browser-accessed business systems, Microsoft 365 / Outlook for email, OneDrive for file storage and/or sharing, and QuickBooks Online for bookkeeping. The next phase should focus on confirming whether any remaining local dependencies are tied to logins, printing/scanning, legacy shared folders, or other office resources.