

# DRAFT Primero Implementation Plan

XXX Roll-Out (2025-2026)



Last Updated: XXX  
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|---------------------------------------------------------|-----------|
| <b>Purpose of this Document</b>                         | <b>4</b>  |
| <b>1. Phase 1: Assessment &amp; Preparation</b>         | <b>4</b>  |
| 1.1 Background, Objectives & Working Groups             | 5         |
| UNICEF HQ Support Provided                              | 5         |
| Partner Responsibilities                                | 5         |
| 1.2 Key Documentation                                   | 6         |
| 1.2 SOPs for Case Management                            | 7         |
| 1.3 Case Management Paper-Based Forms                   | 7         |
| 1.4 CPIMS+ Programmatic and Technical Assessment        | 7         |
| 1.5 Data Protection Impact Assessment                   | 7         |
| 1.6 Information Sharing                                 | 7         |
| Interoperability with external systems                  | 7         |
| Non-CPIMS service providers                             | 7         |
| 1.7 Terms of Use                                        | 8         |
| 1.8 Data Breach SOP                                     | 8         |
| <b>2. Phase 2: Implementation Planning</b>              | <b>8</b>  |
| 2.1 Roles, Features, Functionality & Customization      | 8         |
| 2.1.a Forms & Lookups                                   | 8         |
| 2.1.b Roles Permissions                                 | 8         |
| System Roles                                            | 8         |
| 2.1.c Roles, User Groups and Users                      | 10        |
| 2.1.d Agencies & Services                               | 10        |
| 2.1.e Referrals                                         | 10        |
| 2.1.f Additional Configurations & Reporting             | 10        |
| 2.1.g Locations                                         | 10        |
| 2.1.h Interoperability                                  | 11        |
| 2.2 Training & Knowledge Sharing Approach               | 11        |
| 2.3 Data Analysis & Monitoring                          | 12        |
| 2.4 Hosted Deployment                                   | 12        |
| 2.4.a Hardware Procurement & User Devices               | 12        |
| Laptops                                                 | 12        |
| 2.5 Primero Subscription                                | 13        |
| <b>3. Phase 3: Implementation</b>                       | <b>13</b> |
| 3.1 Start the Deployment Process                        | 13        |
| 3.2 Configure the Demo Instance (Alpha Phase)           | 14        |
| 3.3 Testing & Verification                              | 14        |
| 3.4 Data Migration                                      | 15        |
| 3.5 Go-Live / Production Instance (Beta Phase)          | 15        |
| <b>4. Phase 4: Production Support &amp; Maintenance</b> | <b>17</b> |
| 4.1 Supporting Everyday Use & the Primero Support Hub   | 17        |
| 4.2 Maintenance Releases                                | 17        |
| 4.3 Decommissioning                                     | 17        |

# Purpose of this Document

This document describes the implementation plan for a Primero v2 rollout within the [ORGANIZATION] as a social welfare case management system in [COUNTRY] for vulnerable children. The implementation of CPIMS+ is aligned to requirements defined by key stakeholders in [ORGANIZATION] and supported by UNICEF.

This plan documents the rollout guidelines and is aligned to the steps in the CPIMS+ Workplan, creating a repository for all key information that is required to be documented for CPIMS+. The different phases and document outlined below are described in the [CPIMS+ Rollout Guidelines](#).

## [BACKGROUND, OBJECTIVES AND CONTEXT]

The implementation plan provides space for documenting the following:

- The context for the implementation
- A blueprint for the rollout process: the rollout phases, roles and responsibilities of the stakeholders
- The expectations for ongoing system administration and maintenance
- A description of the IT infrastructure and processes necessary to support the deployment and the ongoing support of the system
- A description of the support process
- The training and knowledge sharing approach

## Accountability Framework

This document will act as an **accountability framework** for the implementation. The key stakeholders will be asked to endorse it. Prior to the approval of the implementation plan and prior to the go “live” (production) phase, a formal agreement outlining the legal/normative requirements for this implementation (Terms of Use) must be signed by all relevant parties.

The Implementation Plan should be considered a “living document” after the endorsements. Any further changes should come from a joint discussion and with the approval of the stakeholders at the country level. When this document is updated, the date of change and responsible person making the change should be documented clearly in the header of this document.

# 1. Phase 1: Assessment & Preparation

Primero will be the central case management data repository. A single web-accessible instance (with all provisions for data durability) will be hosted by [HOSTING AGENCY] and accessible to all national, regional and district partners. Partners involved in the CPIMS+ in [COUNTRY] on [DATE] include [ORGANIZATIONS].

## 1.1 Background, Objectives & Working Groups

The CPIMS+ rollout will be the joint responsibility of [ORGANIZATIONS]. Assessment and preparations for the rollout are the responsibility of [ORGANIZATION]. UNICEF will provide assistance as defined in the workplan. UNICEF is responsible for the IT infrastructure and support will be handled by the Primero Technical Team at UNICEF.

[RATIONALE FOR IMPLEMENTATION, CONTEXT, IMPLEMENTATION LOCATIONS, SCALE-UP PLAN]

### **UNICEF HQ Support Provided**

For inter-agency CPIMS+ rollouts, UNICEF can support the rollout in the following tasks:

- Review and endorsement of this implementation plan in coordination with partners
- Ensuring that the Primero system is implemented in accordance with the national CP Case Management SOPs
- Leading and coordinating system translation and localization efforts
- Support with each phase and step of the CPIMS+ Rollout Guidelines
- Providing the IT infrastructure necessary to host Primero
- Primero data protection
- Training the Primero System Administrator and providing on-going support
- Coordinating with the focal points of implementing agencies to ensure that the system roll-out is receiving the support it needs
- Ongoing application support

### **Partner Responsibilities**

**Partner 1** will be responsible for taking over and supporting the Primero Implementation. The tasks include:

- Coordinating training and onboarding of personnel
- Coordinating device procurement
- Working with UNICEF to build the Primero implementation
- Ensuring that the Primero system is implemented in accordance with the national SOP
- Primero data protection

Last Updated: XXX  
Changes made by: XXX

- Providing ongoing operational support to the system hardware/software and users of Primero
- Coordinating UAT feedback from district-level participants
- Implementing future Primero national expansion

Please see the table in **Annex A** for the current names attached for the called out responsibilities.

Below is a summary of the key participants involved in the CPIMS+ rollout:

| Role & Responsibility                                                                                                                      | Name & Email     |
|--------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| Head of Office / Director of Country Operations (approval and sign-off)                                                                    |                  |
| CPIMS+ in Country Lead Coordinator (in-country coordination between partners aiming to utilize the CPIMS+)                                 |                  |
| Primary Primero System Administrator in country for all agencies                                                                           |                  |
| Supporting Primero System Administrators in specific agencies using CPIMS+                                                                 |                  |
| User Acceptance Testers (key focal points from participating agencies who review and sign off on forms and functionality prior to go-live) |                  |
| CPIMS+ Partner Focal Points per agency                                                                                                     |                  |
| UNICEF Focal Point                                                                                                                         |                  |
| Primero Deployment Lead                                                                                                                    | Jan Panchalingam |
| On-site IT Support                                                                                                                         |                  |

A detailed timeline of **key activities** for the rollout can be found in the [INSERT WORKPLAN LINK].

## 1.2 Key Documentation

Last Updated: XXX  
Changes made by: XXX

Key documentation for the CPIMS+ implementation can be found here [INSERT LINK]. This folder includes the final versions of harmonized SOPs and paper forms for case management, CPIMS+ assessment, DPIA, DP-ISP which have been developed by the Global Case Management Task Force. It also includes legal documents such as the Terms of Use (ToU), work plan which will be filled out during the rollout and data breach process. These documents are linked to the Implementation Plan as they inform data sharing processes for the utilization of the system.

## **1.2 SOPs for Case Management**

[INSERT LINK IF APPLICABLE]

## **1.3 Case Management Paper-Based Forms**

[INSERT IF APPLICABLE]

## **1.4 CPIMS+ Programmatic and Technical Assessment**

[INSERT IF APPLICABLE]

## **1.5 Data Protection Impact Assessment**

[INSERT IF APPLICABLE]

## **1.6 Information Sharing**

[INSERT IF APPLICABLE]

It is expected that Primero will align to the agreed-upon information sharing protocols at the country level. Users across organisations/ institutions will manage data which will be stored in a single central database. Restrictions of who can see what data will be enforced via Primero authorization concepts of Role and Group permissions. These permissions were determined by the in-country team and can be viewed in the [ROLES PERMISSION TAB OF THE WORKPLAN LINK]. In light of this, it is required that the SOP and DPISPs be reviewed during the alpha phase to ensure complementarity, and may need to be revised later on.

## **Interoperability with external systems**

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[INSERT IF APPLICABLE]

Interoperability will be sought out with the following systems: [INSERT SYSTEM E.G. PARTNER SYSTEM, GBVIMS+, PROGRES V4] to enhance case management and outcomes for children and their families.

## **Non-CPIMS service providers**

Referrals and transfers can be made to service providers outside of the Primero application. Primero has something called external referral roles: a set of authorization rules that limit what data can be exported from the system or saved as printable PDF files.

## **1.7 Terms of Use**

[INSERT LINK]

## **1.8 Data Breach SOP**

This implementation of Primero should adhere to a standard operating procedure for data breaches. If hosted on UNICEF's Azure cloud, the Data Breach SOP is included in the link below:

<https://drive.google.com/file/d/1i0GZ9OEgz-HYx0xjKxKjgFMUqK54zkZt/view?usp=sharing>

The documents developed should be attached as annexes to this plan with dates clearly stated on each document.

## 2. Phase 2: Implementation Planning

This section describes how Primero will be implemented.

### 2.1 Roles, Features, Functionality & Customization

The application will form the basis for target release of Primero v2.0 CPIMS+. All configuration and requirements are documented in [INSERT WORKPLAN LINK].

#### 2.1.a Forms & Lookups

The application will be configured based on the Global Case Management Task Forms with minor localization which is tracked in the [FORMS FEEDBACK TAB OF THE WORK PLAN].

#### 2.1.b Roles Permissions

##### System Roles

Primero provides a construct also called a “role” which governs how users are permitted to interact with the system and the case management data it contains. Therefore the business roles of the organisations’ staff will be mapped to the Primero “roles” with their own permissions and restrictions. At no point is it implied that the roles as they are understood in the Primero software will affect an individual’s role and title in their organisation.

The roles below will be defined during a collaborative requirements gathering process, and are based on the implementation guide and requirements gathering sessions with stakeholders. The team will try to keep the number of overall roles configured in Primero low in order to reduce the configuration maintenance overhead. If the roles do not end up granting sufficiently precise access to the users or end up being too permissive (i.e. allowing certain users to see more than they need to see), they will be revisited, and new ones may be created by the System Administrator. The primary users of the system will be [INSERT WORK PLAN LINK: ROLES PERMISSIONS tab]. Below is a high-level summary of the system roles:

**Case Worker**, core role defining the work of a typical case worker:

- Can only view and edit their own records,
- Refer a case,
- Send the case plan, assessment and closure for approval to their supervisor

**Case Management Supervisor**, general oversight role for case workers:

- Can view cases of case workers they supervise

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Changes made by: XXX

- Can add notes to a case but cannot edit a case
- Refer, assign, transfer
- Approve case plan, assessment and closures

**Child Protection Manager / Coordinator:**

- Can view cases of case workers they supervise
- Can add notes to a case but cannot edit a case
- Refer, assign, transfer
- Can over-ride consent if it is not provided for a referral
- Approve case plan, assessment and closures

**Reporting Focal Point:**

- This role is for high-level management and UN staff
- Can only view and download anonymized, aggregate reports

**CP Service Provider:**

- Receives referrals and can only see IA referral details to complete a referral

**Organizational Administrator:**

- Does not have case access
- Can create/edit users for the agency

**Inter-Agency System Administrator**, overseeing the entire implementation:

- Authorized user that manages the system including creating and editing users, agencies, roles, locations, user groups, configuration
- Full understanding of Excel and report creation
- Along with fully understanding Primero, the system administrator will need to be familiar with cloud-based deployments, understanding provisioning servers, deploying applications, setting up monitoring and other security measures, as well as networks, and hardware configuration (laptops, etc.)
- A contractual obligation to protect confidentiality of case data
- It is expected that the System Administrator will not have access to identifying case data. The System Administrator will not be able to change permissions associated with their own role.

## **2.1.c Roles, User Groups and Users**

The application will be initially piloted with the above-mentioned roles. Please view the [USER MAPPING TAB OF THE WORK PLAN] to see a full list of users provisioned.

## **2.1.d Agencies & Services**

The application will be configured based on referral pathways defined in-country. The participating agencies including [AGENCY NAMES] are service provider agencies who will provide the following services [INSERT LIST OF SERVICES]. Service mapping can be found on the [SERVICE MAPPING TAB OF THE WORK PLAN].

## **2.1.e Referrals**

The application will be configured based on the Global Case Management Task Forms and the inter-agency referral form for data sharing for service provision.

## **2.1.f Additional Configurations & Reporting**

In addition to the baseline reports in CPIMS+, the following reports have been configured in the system: [INSERT REPORTS].

The application is available in English. [ADD ADDITIONAL LANGUAGES]. A full list of configuration can be found on [CONFIGURATION TAB OF THE WORK PLAN].

## **2.1.g Locations**

Locations used in the application were sourced from OCHA's Humanitarian Data Exchange, as agreed by the partners. Please view the locations used in the system in the [LOCATIONS TAB OF THE WORK PLAN].

## **2.1.h Interoperability**

[INSERT IF APPLICABLE]

## **2.2 Training & Knowledge Sharing Approach**

Once the CPIMS+ is ready and configured and training for end-users is scheduled. Training material for the CPIMS+ can be found [INSERT LINK] which is downloadable and customizable.

Below is a list of artifacts (in English) to that will be available to support training:

- Case Worker & Supervisor User Guide: PPT, PDF
- System Administrator User Guide Materials: PDF

Last Updated: XXX  
Changes made by: XXX

- System Administrator Configuration Guide: PDF
- How-To Introductory Videos

## Initial Training for System Administrators

Training for System Administrators is conducted by the Primero Deployment Lead on [INSERT DATE]. It is necessary that the Primero System Administrator understands the following:

- Form configuration (duplicating/modifying forms, creating new forms)
- Field configuration (adding values to existing fields, creating new fields, sharing existing fields in different forms)
- Role-based Access / Actions configuration (filters, dashboards, reports, exports/imports, referrals/transfers, read, write, etc.)
- Adding users and assigning them roles
- Monitoring and maintenance
- Overview of Primero
- Orientation on documentation artifacts, what is available for each type of user
- Troubleshooting guide
- List of common questions and answers (FAQ)
- Protocols for known situations (e.g., backup and recovery)

There is no need for a formal classroom setting for any follow up sessions with the System Administrator and all material can be found [INSERT LINK TO SUPPORT HUB]. Training materials include slide presentations and user guides as PDFs that can be used for easy reference for functions that aren't frequently used. Additionally, there are a number of short videos covering using the application's basic navigation and functionality.

## Initial Training for Case Workers & Supervisors

Case Worker and Supervisor training is conducted and coordinated by UNICEF on [INSERT LEAD] on [INSERT DATE]. This initial training supports the first cohort of users as trainers therefore it is recommended that a cross-section of expected Primero users are present in trainings, covering all roles defined in the SOP. In the future, those trained can distribute materials and proctor courses within their sites/regions. Centralizing the co-lead training sessions will allow for not only a standardized approach to teaching Primero to users, but also allow for a quicker rollout and the training of multiple sites at once.

Training sessions for the end users will include:

- [Logging using your user role](#) provided in the "[Users Created in Primero](#)" tab
- Going to "Cases" and [searching for a case](#)
- [Creating a "New Case"](#) and you should feel familiar with all of the identification/registration forms and [The workflow status bar](#)
- Reviewing the [Case Worker Home Page](#)
- Reviewing the Assessment, Case Plan, Services and Closure forms

Last Updated: XXX  
Changes made by: XXX

- [Flagging a case](#)
- The [Tasks tab](#) to track any overdue or upcoming tasks
- [How to send a Assessment, Case Plan and Case Closure for Approval](#) and how a supervisor is able to approve/reject an Assessment, Case Plan and Case Closure
- [Referring a case for a service](#)
- [Viewing the change log](#)
- [Case manager dashboard](#)
- [Case Manager role: assigning a case](#)
- [Case Manager role: transferring a case](#)
- Case Manager role: adding a note to a case workers' case
- [Disabling a case](#)
- [Reporting](#)
- [Going offline](#)
- [How to change your password](#)

The configured demo site will be used for training.

## 2.3 Data Analysis & Monitoring

The CPIMS+ team is currently building KPIs which you will be able to get top line data from. It is key however to decide on the inter-agency aggregate data point (aligned to the DPISP) as well as data within your own agency which will inform programming. [INSERT PLAN].

## 2.4 Hosted Deployment

Read more about the hosting infrastructure when hosted by UNICEF, deployment, system architecture & infrastructure, data backups, system maintenance, technical security considerations and system disaster recovery [here](#).

### 2.4.a Hardware Procurement & User Devices

#### Laptops

The implementing agencies will need to provide laptops for the users of Primero. The following will be expected:

- A well supported, licensed install of Windows 8.1 or above
- A modern, recently updated browser: Chrome is recommended
- Excel or LibreOffice (<https://www.libreoffice.org/>) or some other spreadsheet application capable of reading XLS and CSV files that are exported from Primero
- A PDF reader for forms exported for printing
- A licensed anti virus program is strongly recommended. Avast is a good free option: (<https://avast.com>)

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In locations where power and local network connectivity are unpredictable, it is recommended to use commercial 3G mobile dongles. In addition to procuring the devices, it's recommended to provide protective device cases and portable chargers.

## 2.5 Primero Subscription

Primero was purchased on [INSERT DATE] and [LINK TO STATEMENT] for the following services: [INSERT DETAILS]

# 3. Phase 3: Implementation

## 3.1 Start the Deployment Process

Primero will be deployed in phases. Phasing will minimize risk to the programs and allows end users to become familiar with the system.

At project kick-off, it was decided to introduce a core set of users to the system. The first cohort of users was chosen from [INSERT NUMBER OF DISTRICTS] who will be engaged in User Acceptance Testing (UAT). The users will act as trainers to support the larger system roll-out and training for their organisations.

The selection of the piloted districts were based on the following criteria:

- Sites with programme capacity (i.e. those who are following the SOP and using the standardized case management forms)
- Digital literacy

The primary users of the system will be [INSERT WORK PLAN LINK: ROLES PERMISSIONS tab].

It is recommended to bring on new teams and users through an initial push to key locations with strong business processes, teams and infrastructure, and then through a series of subsequent, coordinated expansions into new locations.

## 3.2 Configure the Demo Instance (Alpha Phase)

The Alpha phase begins on [INSERT DATE]. The team deployed a fully functional **demo instance** of Primero (v2) to a **UNICEF-hosted Azure cloud server**. The System Administrator will first receive training on how to configure the system by the Primero Deployment Lead on [INSERT DATE]. Thereafter, the System Administrator receives a “Welcome” email to Primero/CPIMS+ to set up their access and password.

Last Updated: XXX  
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CPIMS+ will be configured by the System Administrator to a process that has been designed to resemble the process described in the SOPs. The system administrator will configure the CPIMS+ as defined by the [INSERT WORKPLAN] by adding or modifying:

- Forms and fields: new forms being added to the business process
- Roles: tightening or changing the authorization rules
- Reports: new reports being implemented

In the future once the system is live, the Primero System Administrator, in coordination with the key stakeholders will implement these changes as necessary. Configurations should never be made directly on the live production server. Instead, each Primero implementation will include two environments - one “demo” environment [INSERT URL] and one “production” environment [INSERT URL]. The purpose of the demo environment is to provide a “sandbox”, a safe secondary instance where all changes or modifications can be tested before they are pushed to the production environment. The demo environment is clearly marked on the login page with a banner and button labels, and contains the word “**demo**” in the URL. No real data should ever be entered into the demo instance.

New releases, which may include security patches as well as new features, will be released to the demo environment where they can be tested. Any configuration change must be communicated to the system users to avoid surprises and misuse.

### 3.3 Testing & Verification

During the Alpha phase, the system is currently limited to a set of designated testers and trainers. The data being entered into the Alpha Primero will not be real child records or real case management data. The goal of the alpha deployment is to put a demo system in front of the users and collect feedback that can be recorded and used to inform further configuration. Users can access the alpha server at [INSERT URL].

During the Alpha phase, the System Administrator will be responsible for familiarizing the users of the partner organizations with the application by creating logins into the alpha deployment and allowing people to create sample case data. These “alpha users” will be encouraged to create and manage *fake* cases, and to ensure that no real case data is entered into the system during this phase. Users will be asked to draw upon their experience to develop and manage these cases in a way that simulates the actual use of the system, and their needs as users. Structured feedback will be gathered throughout this process and can be captured on [INSERT FEEDBACK FORM].

### 3.4 Data Migration

If migration of existing “legacy” data is required [INSERT MIGRATION PROCESS]. In this implementation only **open/active, high risk/medium risk records** will be migrated. Once migration

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is completed to CPIMS+, any legacy applications should be discontinued and properly decommissioned.

The CPIMS+ is ready and configured on [INSERT DATE] and training for end-users is scheduled after configuration on [INSERT DATE].

### 3.5 Go-Live / Production Instance (Beta Phase)

Once the application is functionally ready and configured, and once this implementation plan is fully signed off by the working group leading the implementation (as defined in section 2.2) and agreed to by all stakeholders, the System Administrator will “[promote](#)” the configuration to the final **production** website. Logins will be created for the users by the System Administrator (with support from Primero Deployment Lead as needed). The System Administrator will take full responsibility for managing the system. The final application domain name is [INSERT URL]. The URL has been determined by [INSERT LIST OF PARTNERS]. If migration

The live system will now enter a support phase, with periodic maintenance releases with bug fixes and minor features being pushed on a regular basis.

All support requests will go through the support.primerio.org.

It is recommended that after go-live, the demo site is used for training or testing and demoing configuration changes. It should be remembered that no live or sensitive information be ever entered into this test-only instance as it is not securely set up or backed up.

The System Administrator will be responsible for setting up and maintaining the users. The System Administrator will coordinate with all partners to collect a list of all active users. Likewise key partner focal points will be responsible for requesting new users to be created or specific users to be disabled with regular job turnover. The key partner focal points should provide the System Administrator with a list of users [INSERT USERS AND GROUPS LINK], detailing the following:

- User's full name
- Assigned Primero user name (this will need to be standardized for the whole system)
- User's organisational title
- User's designated team or teams
- Desired role (see Roles, above)
- Organisational email
- User's location
- User's agency
- List of services the user offers, if different from the agency's

It is strongly recommended that users correspond to individuals to ensure case management accountability.

Last Updated: XXX  
Changes made by: XXX

In the production environment, for organizations using single-sign on, the system administrator will select the identity provider to ensure seamless authentication for those users. If SSO is not enabled for an organization, the system administrator has the option of setting a temporary password and communicate it back to the individual users or requesting the user to set up their own password via a “Welcome” email.

The initial user set and user group set corresponding to the initial designated set of users will be configured on the Primero global instance during the Beta phase by the System Administrator, supported by the Primero Deployment Lead as needed.

## 4. Phase 4: Production Support & Maintenance

### 4.1 Supporting Everyday Use & the Primero Support Hub

This section describes the implementation support process. User and technical support for the application has been broken up into three categories: Level 1, Level 2, Level 3. The levels correspond to ascending difficulty in finding a solution to a problem. Level 1 is an issue which can be resolved by a local manager, system administrator, or trainer resource. Levels 2 and 3 require more technological assistance from an outside support team, such as the software vendor who manages issue ticketing via the Primero Support Hub: <https://support.primerio.org>. The Primero team will set up and train the System Administrator to use the Support Hub ahead of Go Live. Read more about the issue escalation process, and the role of the system administrator [here](#).

#### Authorized User Procedures

System administrators are responsible for user management and responsible for validating individual authorized users who are accessing the Primero system. This process includes:

- 1) Receiving a verified and approved case worker and manager list from organizational focal points prior to the system administrator adding users to the system. This list will include: the full name of the user, role of the users, team members (if the user is a supervisor), email address, position, phone number and location of the users.
- 2) Email notification/request to the Primero system administrator from the organizational focal point for adding/removing/suspending individual users which includes: the full name of the user, role of the user, team members (if user is a supervisor), email address, position, phone number and location.

The Authorized User Procedure can be modified based on the in-country needs and it is strongly recommended that this authorized user procedure is in place to ensure due diligence prior to providing user access to the Primero system.

### 4.2 Maintenance Releases

Software application updates will be made by the IT support team in coordination with the Primero System Administrator. They will require no action on the part of the end users, although the System Administrator must schedule and communicate an appropriate time with the end users when the system will not be available.

Last Updated: XXX  
Changes made by: XXX

There is ongoing development and bug fixing in Primero. Some features and fixes may be of interest to the implementation team and System Administrator and some may not. The development team will attempt to conservatively balance the release between desired functionality, bug fixes, security, and potential risk to system stability when introducing upgrades.

The following may be released during maintenance:

- Requested features
- Complex configuration changes made in coordination with the national CPIMS Coordinator and the System Administrator
- Bug fixes either identified by the Primero development team or by the end users
- Security updates

The maintenance release will be periodic and scheduled well ahead of time to avoid any disruptions.

## 4.3 Decommissioning

If the mission of Primero has been fulfilled, or the product has been superseded, or is no longer sustainable, it needs to be decommissioned. The following should be considerations for a decommission plan:

- Ownership, confidentiality, and potential destruction of the data currently stored in Primero
- Migrating data and user base to new product, if applicable
- Shutting down or repurposing the existing hardware and cloud services
- Programmatic changes

More details on putting together a plan for decommissioning a UNICEF ICTD product can be found here:

[https://docs.google.com/document/d/1nlMa5VxUFadrl7G7\\_o-Y7affTe5jn-2Og3JxX39lsjQ/edit?usp=sharing](https://docs.google.com/document/d/1nlMa5VxUFadrl7G7_o-Y7affTe5jn-2Og3JxX39lsjQ/edit?usp=sharing)