

### Addition of Guardian assignment in CRM

On April 14, 2016 DODD released the guardian assignment in CRM. This allows County boards the ability to assign and maintain the guardian relationship between the individual and the guardian.

DODD retired the legacy guardian application and moved the functionality into CRM. This allows for the county boards to maintain the most up to date information on the relationships between an individual and their guardian. The information that DODD had on file as guardian assignments in the legacy guardian application were moved into CRM. It is the responsibility of the county boards to review the guardian information and update if necessary. County Boards can run the XML file report to see who has a guardian and who the guardian is assigned to verify.

Also if you are a non-imagine county you will only be able to add a guardian, no additional contacts can be added.

Below are the links to the instructions on adding/editing guardian information. Along with pulling the XML report. There is also the link to the Webinar. All of the information can be found on DODD's website at [DODD.ohio.gov](http://DODD.ohio.gov).

For the Guardian instructions:

<http://dodd.ohio.gov/Training/Documents/County%20Board%20Guardian%20Instructions.pdf>

For the Webinar:

<https://www.youtube.com/watch?v=I9cZIKwWAgQ>

If you have additional problems please email [LOC@dodd.ohio.gov](mailto:LOC@dodd.ohio.gov) or [IDS.support@dodd.ohio.gov](mailto:IDS.support@dodd.ohio.gov)

Thank you

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