Contact Management System

Instruction Guide

November, 2011
Contact Management System Overview

The Contact Management System (CNT) allows users to electronically update and obtain contact information for County Boards of DD, Councils of Government (COG) and the Ohio Department of Developmental Disabilities (DODD). CNT is also the tool that County Boards may use to grant Medicaid Services System (MSS) access to COGs or vendors with whom they do business.

The general public may search contact information or run reports through the CNT link on the DODD website:
https://doddportal.dodd.ohio.gov/INF/additionalservices/cnt/Pages/default.aspx.

County Boards may update contact information and establish COG/vendor associations by submitting an affidavit requesting CNT access. For assistance with the CNT application, send an e-mail to cnt.support@list.dodd.ohio.gov
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Accessing CNT

In order to update or create contacts, obtain access to CNT by completing an affidavit. Access CNT via the DODD Gateway Portal at https://doddportal.dodd.ohio.gov/Pages/default.aspx

Select Applications.

Select CNT from the list of applications.

Select Load Application.
CNT Main Screen

Navigate by selecting items from the “Click for” list on the left. Use the buttons and links provided to navigate and **do not use the back and forward buttons in the browser**. Depending on access assignment, all the options shown below may not be available.

To return to the CNT Main Screen from any module, use the Home or Back buttons or make a selection from the list of options on the left side of the screen.
CB Contact Module

County Board Contact

To create reports or make changes to the County contacts, Select “Contact Modules” from the “Click for” list. Select “CB Contact” from the list of modules on the left of the screen.

County Boards can manage county specific data in the CB Contact Module. The All Contacts list provides a selection of options.

All Contacts returns all staff and management at the County Board.
Administration Contact returns only contacts with administrative roles within the County Board.
Program Contact returns all managers and staff associated with a program at the County Board.
System Contact returns all contacts associated with a DODD system (e.g., PAWS, IDS, PAR, etc).
Contacts w/o a program/system/administration returns data for unassociated contacts.
CB Contact Module (cont’d)

Add a Contact

• To add a contact, select the County Board name from the dropdown list
• Select the Create New Contact button
• Enter the contact information into the fields provided (required fields must be completed)

- Scroll down to select a program/system/administration association for the contact by double – clicking the selection(s). If an association is not desired, proceed to the next step
• Select Add Contact
CB Contact Module (cont’d)

- Select **OK** to add contact
- Select **Back** to return to the County Board Contact Module screen

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<tr>
<th>Selected Program</th>
<th>Available</th>
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<td>Adult Program</td>
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<td>Children/Youth Program</td>
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<td>Daily Rate Application</td>
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<td>Early Intervention</td>
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<td>Administrative Assistant to Sup't</td>
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<td></td>
<td>Assistant Superintendent</td>
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<tr>
<td></td>
<td>Business Manager</td>
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</tbody>
</table>
COG Contact Module

COG Contact

COGs can manage county specific data in the COG Contact Module. The All Contacts list provides a selection of options:

- **All Contacts** returns all staff and management at the COG.
- **Administration Contact** returns only Executive Director and Business manager contacts.
- **Program Contact** returns all managers and staff associated with a program at the COG.
- **System Contact** returns all contacts associated with a DODD system (e.g., PAWS, IDS, PAR, etc).
- **Contacts w/o a program/system/administration** returns records for unassociated contacts.

**Add a Contact**

- To add a contact, select the COG name from the dropdown list
- Select the Create New Contact button
- Enter the contact information into the fields provided (required fields must be completed)
- Scroll down to select a program/system/administration association for the contact by double – clicking the selection(s). If an association is not desired, proceed to the next step
- Select Add Contact
- Select OK to add contact
- Select Back to return to the COG Contact Module screen
Contract Module

The COG Contract Module is intended to store contract data between County Boards and COGs for services provided in specific program areas. **This module is available only to County Boards.** County Boards should create an entry for each program area for which they have a contract with a COG. County Boards should also confirm the contract dates are correctly entered. **Dates will be used to control security access to applications.**

Add a Contract

From the CNT Main Screen, select the COG Contract link.

Select the “COG Contract” link on the left side of the screen.

Select a County from the drop down list and double-click.
Contract Module (cont’d)

- Select **Next**
- Select **Add New Contract**

**Add Contract Between County and COG**

The information on this screen may only be added by county boards. The information is intended to document contractual relationships between county boards and COGs for service provided in specific program areas. With that in mind, counties should create an entry for each program area for which they have a contract with a COG. Counties should also make sure that the dates of the contract are correctly entered since the date information will be used to control security access to applications. If a program area is not listed please contact ODMRDD at cnt.support@odmrdd.state.oh.us to have it added to the table.

- **County:** Enter County
- **COG:** MEDRC - Mid East Ohio Regional Council
- **System:** MSS - Medicaid Services System
- **Begin Date:** 11/02/2011
- **End Date:** [Leave blank if applicable]

Select **Add Contract** when prompted to proceed to add the contract.
Contact Reports Module

Users can compile reports for County Board and COG contacts. Any data entered into the CNT will be returned based on the programs and systems selected. At least one (1) program or system must be selected.

Select the “Contact Reports” link.

Select the report type from the list of items below.
Contact Reports Module (cont’d)

Select the county (or counties) for the program/system results desired. Select “All CBs” or hold the CTRL key to select specific counties.

Select the program(s) and or systems desired.

Select “Create Report”.

[Diagram of Contact Reports Module with county and program selection options]

Glossary
Contact Reports Module (cont’d)

- To select all programs and systems, click **Select All**.
- To deselect all programs and systems (either auto-selected or manually checked), select **Clear All**.
- To query selections, select **Create Report**.

### Contacts for Adams County

**Adult Program**
- **Lafferty, Elizabeth**
  - WVS Director
  - Venture Productions, Inc.
  - 11516 State Route 41, South
  - West Union, OH 45693-9434
  - (937) 544-2823
  - (937) 544-0823 (FAX)
  - (937) 544-9236 (TDD)
  - liaffect@venture5@yahoo.com

**Business Manager**
- **Park, Andrea**
  - 3964 Wheat Ridge Road
  - West Union, OH 45693
  - (937) 544-2823
  - (937) 544-2223 (FAX)
  - apaets@hughes.net

**Children’s/School Program**
- No Data Found

**Medicaid Administration**
- No Data Found

**Service Support Administration**
- **Seitz, Rhiana**
  - 11516 State Route 41, South
  - West Union, OH 45693
  - (937) 544-2823
  - (937) 544-7213 (FAX)

Reports can be copied/pasted into Microsoft® Excel. Place the cursor to the left of the first character of the first word in the first “cell” of the report returned from CNT. Hold down the SHIFT key and scroll to the bottom of the report returned from CNT. Mouse right-click and Select “Copy” from the drop down list (or CTRL-C). Open an Excel worksheet, place cursor in cell A1, and paste (or CTRL-V). While the worksheet is still highlighted, adjust the columns, select the font type and size desired, and save the document.
The Contact Management System allows users to search data by staff first and/or last name.

Select “Contact Search” from the list of items in the “Click for” box.

- Enter the first and/or last name of the contact
- Select Search All from the drop down list
- Order by Name
- Select OK

Ordering by Name returns queries in alphabetical order by last name. Ordering by Type returns queries in alphabetical order by County or COG.
Contact Search (cont’d)

Return All (by Name or Type order) returns all contacts in the CNT.

NOTE: DODD contacts are not available in CNT.

To contact DODD employees, please call 800.617.6733.
Vendor Contract Module

The Vendor Contract Module allows users to view or add contracts between counties and vendors. Contract data can only be added by county boards. The information is intended to document contractual relationships between county boards and vendors for service provided in specific program areas. Counties should create an entry for each program area for which they have a contract with a vendor. Counties should also make sure that the dates of the contract are correctly entered since the date information will be used to control security access to applications.

Select the Vendor Module link from the list of items in the “Click for” box.

- Select the “Vendor Contract” link and choose a county. Multiple-county selection is not available in this module.
- Click Next.
Vendor Contract Module (cont’d)

Select “Add New Contract” to add a contract.

Existing Vendor Contracts
No Contract assignment.
Vendor Reports

Users can view reports for all vendors associated with the assigned county by selecting the “Vendor Reports” link from the list of items in the “Click for” box.

- Select a vendor from the Vendor drop down list.
- Select “View Contacts”.

CNT returns a report of all counties with a contract vendor association, the system-vendor association, and the begin end dates of the contract.
Please contact cnt.support@list.dodd.ohio.gov for CNT support, questions, or concerns.