



## imagineIS County Training Budget Support Specialist Tip Sheet

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**1. Set the Default Budget Support Summary Dashboard.**

*Sign on to imagineIS as Budget Support Specialist-->Imagine down arrow-->DASHBOARDS-->select BSS dashboard from sub-grid-->Set as Default.*

**2. Review and Assign Cost to Service Listings.**

*My Notifications-->Cost Projections Needed-->Service Summary-->Services with Financial Information-->LCL-->County -->Fund Source Allocation-->Save & Close.*

**3. Run Workflow Notification to SSA.**

*While on the Service summary select ellipse-->Run Workflow-->Notification to Assigned SSA-Cost Projections Completed-->ADD-->Save & Close.*

**4. Print the Service Summary.**

*CRM down arrow-->IMAGINE tile-->imagine down arrow-->Select INDIVIDUALS-->select name & open-->arrow next to name of individual-->Service Summaries-->Service Summary current-->(--)--> Run Report-->draft, agreement, or completed-->Acrobat .pdf-->open-->print.*

**5. Track SSA push to the FM.**

*Sign on as the SSA-->Choose Individual-->Service Summary-->Request for Approval button.*

**6. Track FM approval of Service Summary.**

*Sign on as FM-->Service Summaries Waiting for Approval-->Click Approval button*

**7. Reset Service Summary to Draft.**

*FM click ellipses-->Reset to Working Draft--> Goes back to SSA as the working draft*

**8. Mark Notification Complete.**

*Sign on as SSA-->Check Notifications-->Select Service Summary/Click Mark Complete button.*