

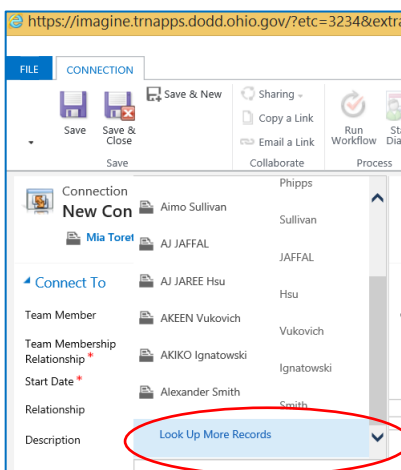
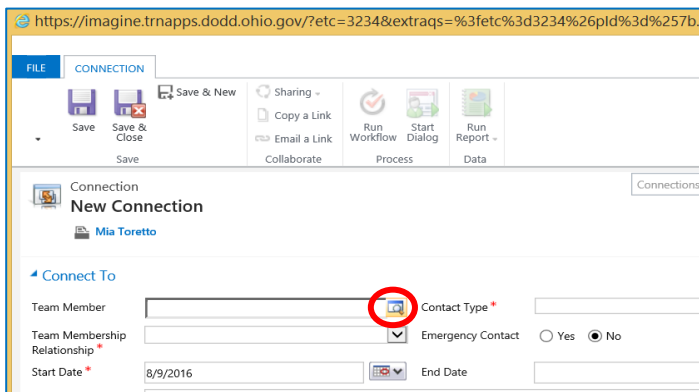
SSA imagineIS Connecting Providers to Individuals

1. Connect an Individual to a Waiver Provider.

- a) Open the Individual's Front Page
- b) Click on the **Connect** button at the top of the Individuals Front Page.



- c) When the Contact window opens, click on the **Search** icon -
- d) Click on **Look up More Records**



- e) When the Search box opens click on the down arrow next to “**Look for**”. From the drop down list chose “**Provider**”.
- f) Then type in part of the Provider’s Agency or Company name and click the magnifying glass.

Look Up Record

Enter your search criteria.

Look for: Provider

Look in: Provider Lookup View

Search: acme

Company Name...	Provider/Vendor...	Certification Sta...
#1-2376	Waiver Provider	

- g) Click in the blue section of the Provider that should be connected.
- h) Click the “**ADD**” button.

Look Up Record

Enter your search criteria.

Look for: Provider

Look in: Provider Lookup View

Search: acme

Company Name...	Provider/Vendor...	Certification Star...	Certification End...	CEO
Acme 101	Waiver Provider			
Acme BDTS LLC	Local Provider	7/7/2015	1/20/2016	Jones
ACME LLC	Local Provider	5/1/2015		FogHorn
ACME Pick Up LLC	Waiver Provider			
Acme Provider	Local Provider	1/1/2015		Jim
<input checked="" type="checkbox"/> AcmeUAT	Local Provider	1/1/2015		Buggs

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New Add Cancel Remove Value

- i) The **New Connection** will appear and click on the magnifying glass next to “**Contact Type**” and chose “**Provider**” from the drop-down list.
- j) Click the down arrow in the “**Team Membership Relationship**” field and click on “**Assigned Team Member**”.
- k) Click on the “**Yes**” radio button for “**Provider Selection Process Completed**”
- l) Complete any of the other fields desired, i.e., “**Emergency Contact**”, “**Relationship**”, etc.
- m) Click on **Save & Close** command.

The screenshot shows the 'New Connection' form in the imagineIS system. The top ribbon contains the 'FILE' and 'CONNECTION' tabs. The 'CONNECTION' tab is active, and the 'Save & Close' button is circled in red. The form fields are as follows:

- Team Member:** AcmeUAT
- Contact Type *:** 4 - Provider (circled in red)
- Team Membership Relationship *:** Assigned Team Member
- Emergency Contact:** Yes (radio button selected)
- Start Date *:** 8/9/2016
- End Date:** (empty)
- Relationship:** 740-333-3333-Emergency Contact
- Provider Selection Process Completed:** Yes (radio button selected, circled in red)
- Description:** (empty)

- n) The Individual's Front Page will open. To see the Connection in the Contacts sub-menu you may have to Refresh your browser.