




SSA imagineIS Tip Sheet – Discovery

1. Navigate to the Discovery Module/s in imagineIS.
Individual's Front Page → 'v' beside **Individual's Name** → **Discovery Management Tile** → Click on the **underlined Discovery Module title hyperlink** to open the module for results entry → Click on the  icon to open the Discovery Results Report.
2. Entering or Editing Discovery.
 Navigate to preferred module (see #1) → Click on the "No" next to **Explored Module** to change it to "Yes" → Click on the "No" next to 'Supports Requested' if needed → Click on drop-down box next to 'Existing Supports' and chose from the list displayed if needed → Scroll down and click on Result or the selected sub-menu → Click '+' sign → The Discovery Entry screen will open as a drop-down from the top to the page → Enter information as required '*' fields and desired → Click on Save → Click Save & Close to return to the Discovery Management window → (Information entered in **Existing Supports** and **Supports Requested** will appear in the **'Discovery Quick Summary Section of the Individual's Front Page.'**) → Click on the **Individual's Name** on the top left to return to their Front Page
3. Enter or Editing Discovery Summary – Important To/Important For
 Navigate to preferred module (see #1) → Scroll down and click on Summary → Enter information in **Important To** and **Important For** sections as desired → Click on Save → Click Save & Close to return to the Discovery Management window → (Information entered in the **Important To/Important For** will appear in the **Individual Quick Summary Section of the Individual's Front Page.**) → Click on the **Individual's Name** on the top left to return to their Front Page
4. Enter or Editing Discovery Summary – Risks/How Addressed
 Navigate to preferred module (see #1) → Scroll down and click on Summary → Click '+' sign in the **Risks and How Addressed** section → The entry screen will open as a drop-down from the top to the page → Enter the Name, Risk, How Addressed and Sort Order → Click on Save → Click Save & Close to return to the Discovery Management window → (Information entered in the **Important To/Important For** will appear in the **Individual Quick Summary Section of the Individual's Front Page.**) → Click on the **Individual's Name** on the top left to return to their Front Page
5. Review and/or Print an Individual's Discovery Quick Summary
Individual's Front Page → Click on **Discovery Quick Summary** sub menu (The report may take a few minutes to display.) → The last **PUBLISHED** Discovery Results will display → Click the '- All Discovery Modules must be phased at the same time.
- Discovery Management can be "Reset to Internal" at any time **prior** to Publishing.
- Once Discovery Management is Published it will be rest to "Working Draft – Internal"
8. Print Discovery Results – Draft or Discovery Results – Published
Individual's Front Page → **Run Report** → When the report displays click the disk 'If the Printer icon is clicked instead of the DISK, an error message will display – "Unable to Load Print Client Control."