



## SSA imagineIS Tip Sheet – Individual’s Record

1. Opening an Individual for the first time – required steps.
  - a) Check that a ‘Residence Address’ and ‘Mailing Address’ are entered for the Individual and are correct.  
**Individual’s Front Page → ‘Addresses’**
  - b) Check that the Individual’s ‘Reporting County’ is listed correctly.  
**Individual’s Front Page → ‘County Information’ → ‘Reporting County’ field**
  - c) Check if the Individual has been ‘Terminated’ and re-enroll them if necessary.  
**Individual’s Front Page → ‘County Information’ → ‘Termination Date’ field (add ‘Reenrollment Date if needed)**
  - d) Check the Individual’s ‘Service Summary’:  
**Individual’s Front Page → ‘√’ beside Individual’s Name → Service Summaries tile**
  - e) Check the Individual’s Determination Dates (span dates) are present and correct.  
**Individual’s Front Page → ‘√’ beside Individual’s Name → Service Summaries tile → Open Current Service Summary record (The dates on the Future Service Summary will automatically be generated) → Click the Refresh icon  to view changes**
  - f) Make certain there is both a Current and Future Summary.  
**Individual’s Front Page → ‘√’ beside Individual’s Name → Service Summaries tile (If there are no or only one Service Summaries listed, submit a DODD Help Desk ticket.)**
2. Enter an Email Address and Telephone Numbers for an Individual.  
**Individual’s Front Page → Contact sub-menu / Phone Information for the Individual**
3. Invite the Individual to the imagineIS Portal.  
**Individual’s Front Page → check Individual’s email address → click on ‘...’ → Click on Invite Individual**
4. Enter an Address (Mailing, Residence, Secondary, etc.) for the Individual.  
**Individual’s Front Page → Address sub-menu → ‘+’ → Enter information → Save & Close**
5. Upload a Picture and make it the ‘Profile’ picture.  
**Individual’s Front Page → Pictures sub-menu → Notes → Attach → Browse → Open → Done  
More About Me sub-menu → Check box in blue area**
6. Enter a ‘Connection’ for an Individual.  
**Individual’s Front Page → Connect → To Another →  Find or Enter Name → Team Membership Relationship → Save & Close (only Assigned Team Members can gain access to the imagineIS Portal)**
7. Invite Guardians and Family Members to the *imagineIS* Portal.  
**Individual’s Front Page → Contacts → Click on Family or Guardian’s Name hyperlink → On Contact Information page click on Login Enabled – Change ‘No’ to ‘Yes’ if needed on the top right of screen → click on the More Command – the 3 dots – ‘...’ → Click on Invite Contact**
8. View and print Emergency Contacts for an Individual.  
**Individual’s Front Page → ‘...’ → Run Reports → Emergency Contacts**
9. Navigate to, view, and upload an Individual’s ‘Documents’.  
**Individual’s Front Page → ‘√’ beside Individual’s Name → Documents**
10. View and approve Pending Pictures  
**Individual’s Front Page → Pictures sub-menu → Notes.**