imagineIS County Training
Customer Eligibility Specialist Tip Sheet

1. Setting default Dashboard View
   Home →*Click Dashboard Title* → *Click Eligibility Specialist* →*Click Set Default*
2. Create a New Individual
   Home →Click CRM→ Imagine Tile→Imagine→Introduction Tile→'+New'→Complete Required Fields→ Save→Click CREATE INDIVIDUAL→Save and Close
3. Send Notification to SSA Supervisor/Director for the new Individual
   Home → Click SSA Supervisor-Director Dashboard→ Scroll down page to "Individuals Pending SSA Assignment"→Find & double-click on the new Individual's record→ Individual's Front Page opens '...' → Other Activities → Notification→ New Notification →Change Recipient to SSA Supervisor-Director's name
4. County to County Transfer – Requesting County
   Home→CRM → Imagine Tile→ Imagine → Click in Individual Search box →Enter part of Individual's name in this format *firstname* →Click Magnifying Glass (The search feature allows you to view Individuals from other Counties) →double-click in the Individual's record → Individual's Front Page opens → Individual's Name in navigation bar→ Individual transfer Request Tile → +Add New Individual Transfer Request → New Individual Transfer Request window opens → Save & Close (Request has been sent to "Losing" county to complete the transfer of the Individual) → Individual Transfer Request Association window opens
5. County to County Transfer – Losing County
   Home→Dashboard View → County Transfers →ITR Pending State→ Click on Transfer Request → Review details→ Click IRR-Date-County Name (Requesting county's name) beside Regarding→ Original County Response chose Approve or Deny→ Nave & Close →Mark Complete
6. Cancelling a County to County Transfer
   Home→CRM → Imagine Tile→ Imagine →Individuals Tile→ Search for Individual's record →Double-Click on Individual's record →Individual's Name in navigation bar →Individual Transfer Tile→ Cancel Transfer Request →OK in message boxes
7. Dropped Transfers
   Home→CRM → Imagine Tile→ Imagine → Individuals Tile→ Search for Individual in Search box →Double-click on Individual's Record→Individual's Name in navigation bar → Change sub-section to 'ITR MDA – Denied→Dropped→Cancelled →view of Individuals records in those categories