



## Budget Support Specialist

### Description

This Budget Support Specialist training will instruct county board members who are responsible for analyzing and estimating costing for services, how to accomplish those activities within the *imagineIS* system. Training will take place in a dedicated training environment, after which the newly gained skills will be applied to the production environment using real cases.

### Who should attend?

Anyone responsible for costing services and setting up individual's service summary for the *imagineIS* system.

### Prerequisite:

Familiarity with the Person Centered Principles concepts championed by Ohio DODD  
Familiar with CRM Navigation  
Comfortable operating a personal computer and mouse.  
Familiarity with internet browsers

## *Agenda*

### Training Prerequisite

Bring active cases to enter into the *imagineIS* training and production environments.

### Introduction

Register, Introductions, System Checks  
Overview  
CRM and ImagineIS Navigation  
The role of Budget Support Specialist in *imagineIS*  
Processes – Overview Roles and Date Ranges  
Relationship – Primary CRM Role Relationships  
Dashboards – Financial Approval Dashboard

### Activities

Setup a Service Summary for an Individual  
Costing for Services  
Sending a Notifications that Costing is Complete  
Printing a Service Summary