



Department of
Developmental Disabilities



imaginelS
Implementation and
Change Management Project

Budget Support Specialist Guide

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The signatories below acknowledge that they have read, understand and approve the contents of this document.

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Draft

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Budget Support Specialist Functional Process

The below flowchart shows the functional process for developing and getting a Service Summary processed for an Individual. The following section define the steps required to complete the function.

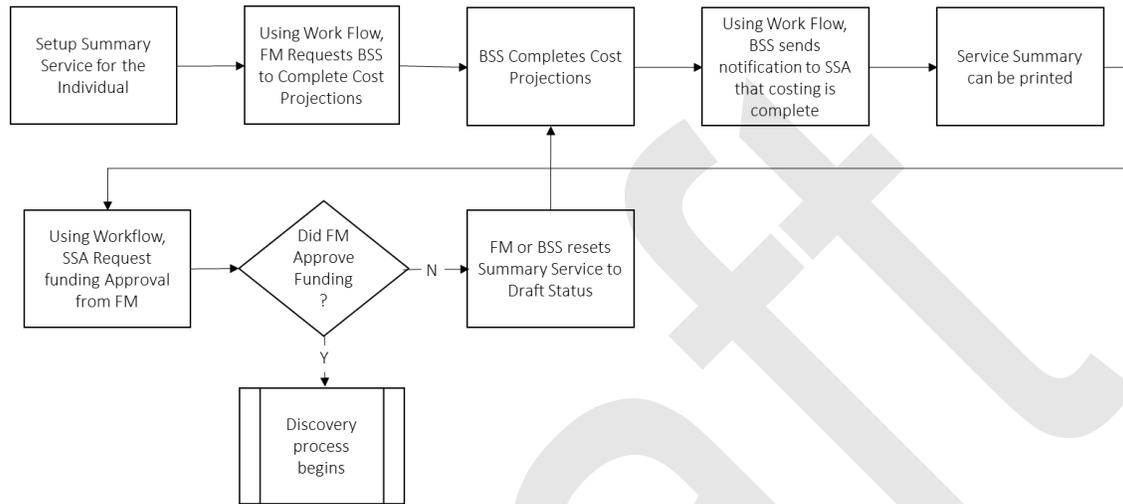


Figure 1 – Budget Support Specialist Functional Process

Set Default Dashboard

The default dashboard when established, will be the dashboard seen each time the user signs into *imaginIS*.

1. Sign on to *imaginIS* as Budget Support Specialist
2. Click the IMAGINE down arrow
3. Click the DASHBOARDS Tile

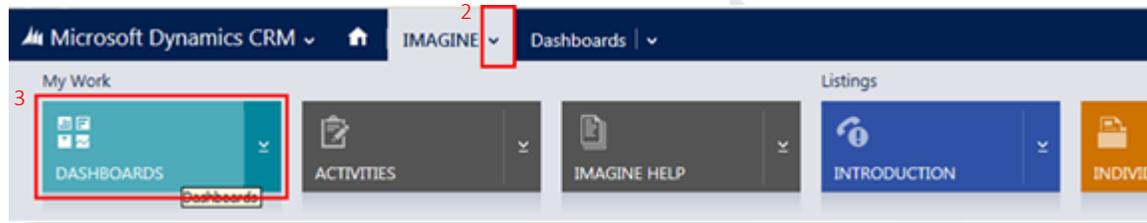


Figure 2 – Set Default Dashboard

4. Click the sub grid down arrow and select “Budget Support Specialist Financial Dashboard”

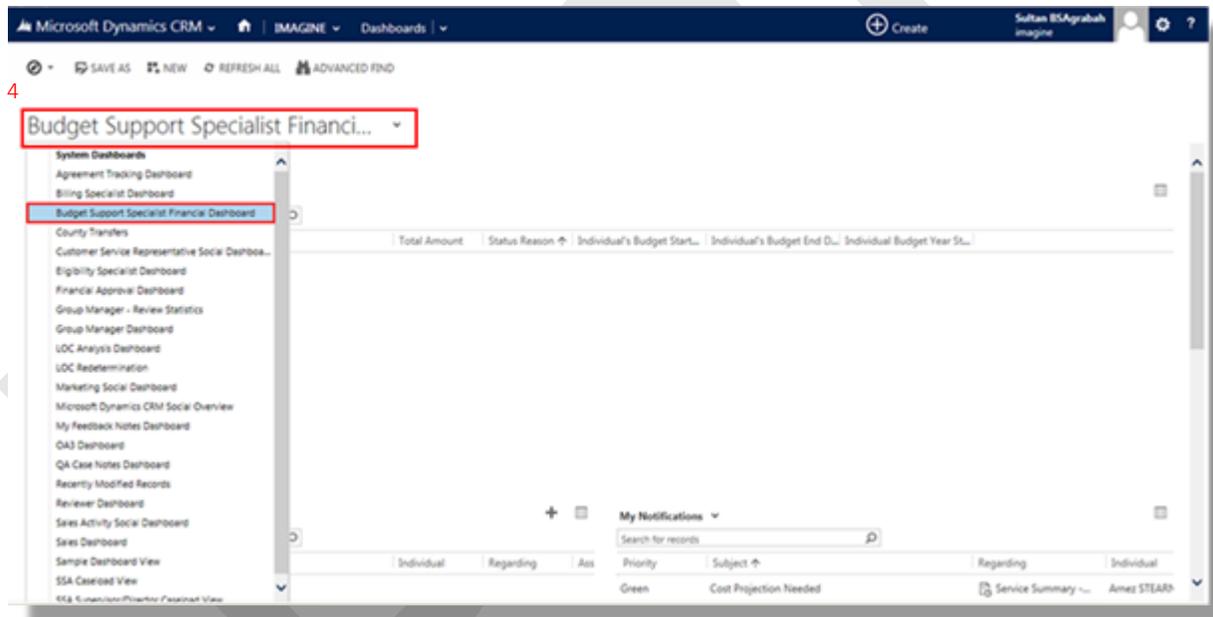


Figure 3 – Budget Support Specialist Financial Dashboard Selection

5. Click "SET AS DEFAULT" to save
6. Click the House on the blue ribbon to return to the initial dashboard



Figure 4 – Set Budget Support Specialist Financial Dashboard as default

Setup Service Summary for the Individual

Assign the Finance Manager and Budget Support Specialist to the Service Summary as well as establishes the date range for which the service will be active.

1. Sign on to *imaginIS* as Budget Support Specialist
2. Click the IMAGINE down arrow
3. Click the INDIVIDUALS Tile

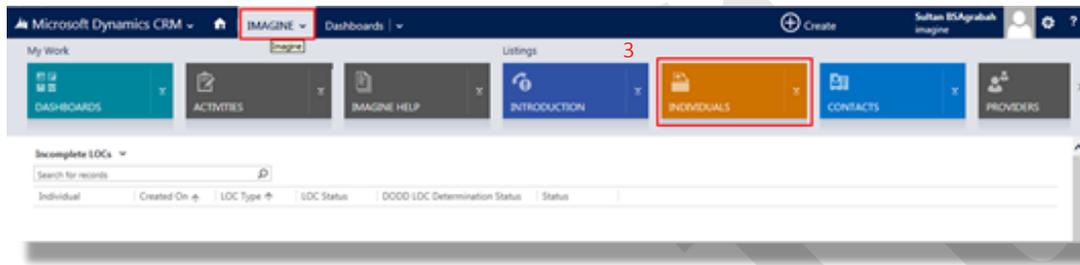


Figure 5 – Navigation to select the Individual

4. Search for the desired Individual



Figure 6 – Search for an Individual

5. Click on the Individual's "Full Name" link to display the Individual's screen

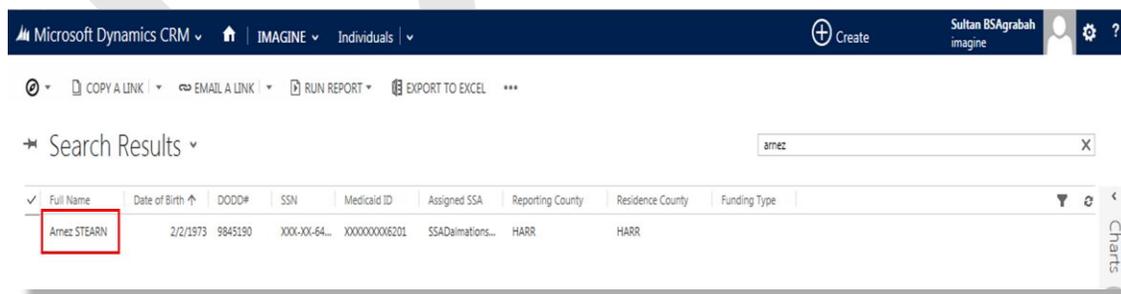


Figure 7 – Select an Individual

6. Select the down arrow next to the Individuals name
7. Select the Service Summaries Tile

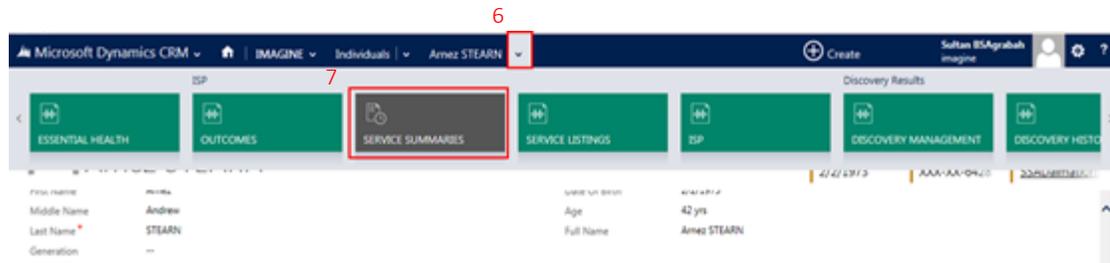


Figure 8 – Select the Service Summaries Tile

8. Click the 'Current' Service Summary

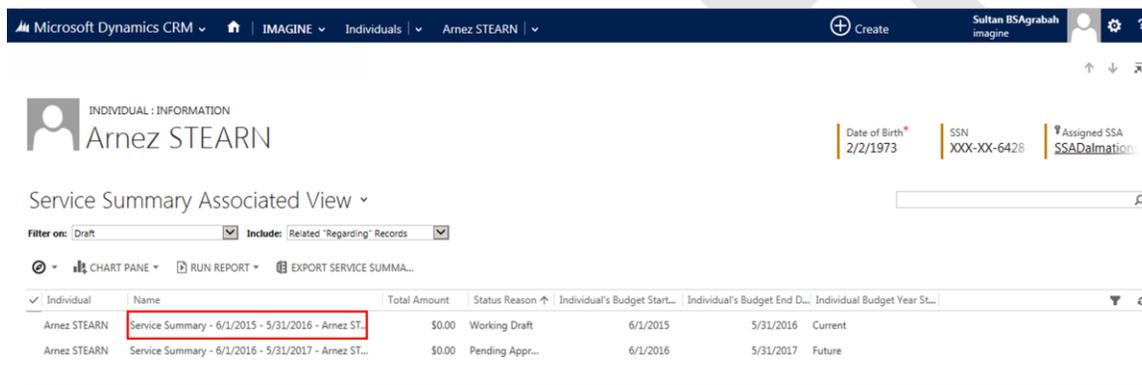


Figure 9 – Select the current Service Summary

9. Click on the “Assigned Financial Manager” field
10. Look up the desired Financial Manager and select to assign to the Service Summary
11. Click the Budget Support Specialist Field
12. Look up the desired Budget Support Specialist and select to assign to the Service Summary
13. Click the “Individual’s Budget Start Date” and enter span start date
14. Click the “Individual’s Budget End Date” and enter span end date
 - a. Note: Span Date cannot exceed 366 days
15. Fill in other information on the page
16. Click the Save link
17. Click Save & Close link

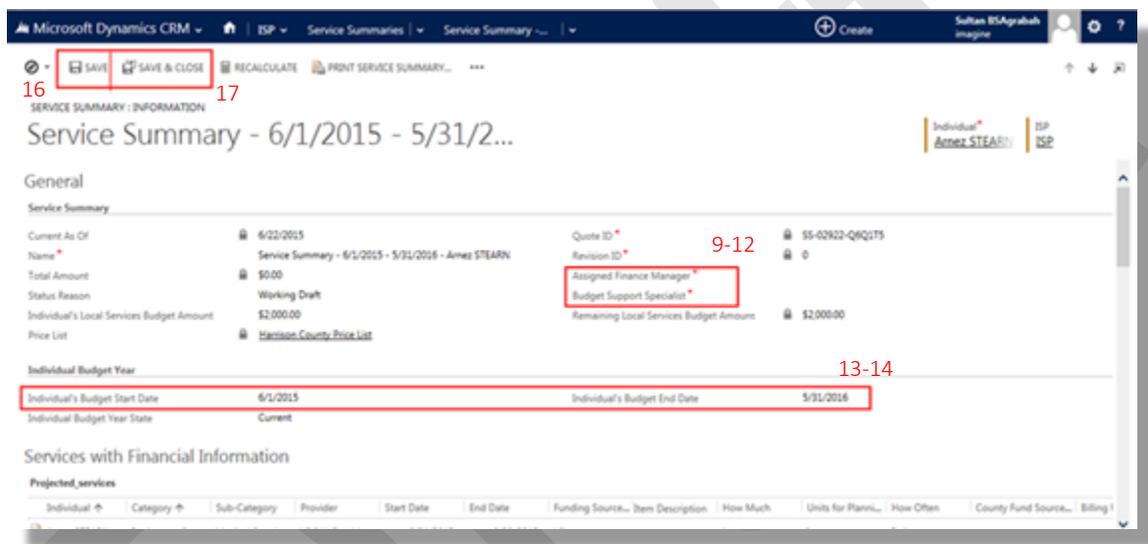


Figure 10 – Service Summary navigation and field locations

18. Click the “refresh List” link on right side of the individual’s sub grid on the individual front page
19. The status reason column will be “Working Draft”.

Note: Below are the Service Summary statuses and their definition:

Working Draft – SSA is entering information. The Service Summary cannot be seen by portal users.

Pending Approval – BSS has completed costing and the Service Summary is now viewable by portal users and can provide feedback. Any non-assigned team member will require feedback to be sent to the SSA for manual entry. Finance manager must enter waiver dollars at this point. Printing is allowed.

18

Complete – The Summary Service is active and will print on ISP.

Microsoft Dynamics CRM | IMAGINE | Individuals | Arnez STEARN | Create | Sultan BS Agrah imagine

INDIVIDUAL : INFORMATION
Arnez STEARN

Date of Birth: 2/2/1973 | SSN: XXX-XX-6428 | Assigned SSA: SSADalmation

Service Summary Associated View

Filter on: Draft | Include: Related "Regarding" Records

CHART PANE | RUN REPORT | EXPORT SERVICE SUMMA...

Individual	Name	Total Amount	Status Reason	Individual's Budget Start	Individual's Budget End	Individual Budget Year Start
Arnez STEARN	Service Summary - 6/1/2015 - 5/31/2016 - Arnez ST...	\$0.00	Working Draft	6/1/2015	5/31/2016	Current
Arnez STEARN	Service Summary - 6/1/2016 - 5/31/2017 - Arnez ST...	\$0.00	Pending Appr...	6/1/2016	5/31/2017	Future

Figure 11 – Individual's Service Summaries List refresh

Completing Cost Projections

Identify the costing type and costing for the service (Local or Waiver).

Note: The Service listing needs to be created for the outcome prior to this step. Otherwise this step cannot not be completed.

1. Sign on to *imaginIS* as Budget Support Specialist
2. Select from the subgrid “Budget Support Specialist Financial Dashboard”

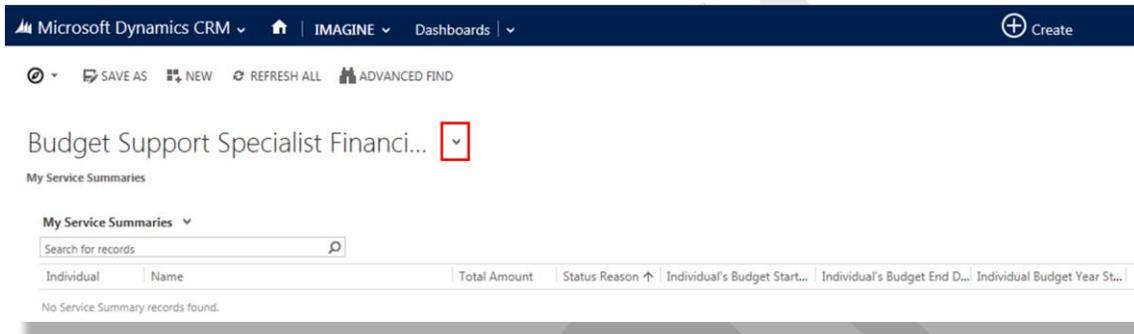


Figure 12 – Changing to Budget Support Specialist Dashboard

3. Scroll down the page to “My Notifications”. This is located on the same line as “Alerts”.
4. Click on ‘Cost Projections Needed’ notification
 - a. If this notification does not exist, use the My Notification drop down to change the view.
 - b. Use the Pop Out, , to see more records associated with the Notifications view

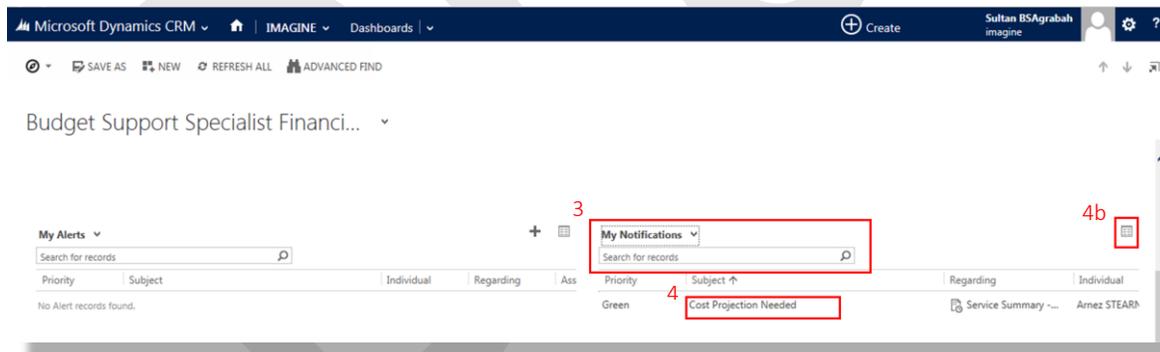


Figure 13 – Navigation to find “Cost Projection Needed” records

5. While on the 'Cost Projections Needed' page, click the Service Summary, on the Regarding line

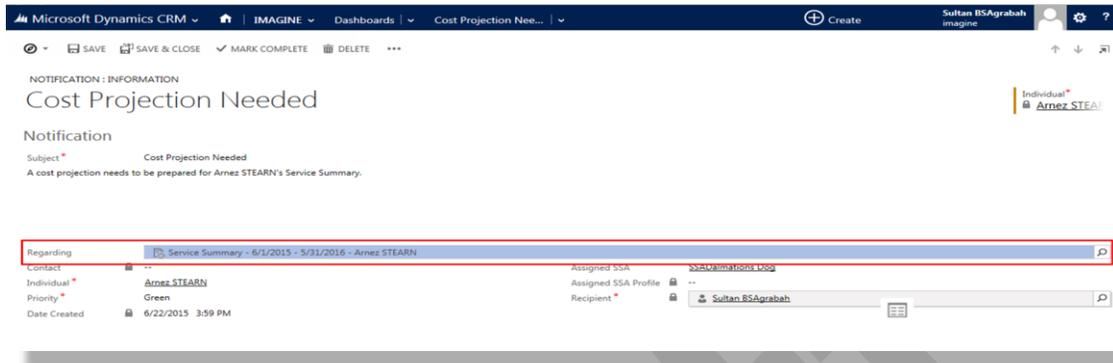


Figure 14 – Select Service Summary from Notifications

6. Scroll down to “Services with Financial Information” section and select. There can be two types:
- a. LCL = Local; Must have a Local Fund Source Allocation associated with it.
 - b. WVR = Waiver; A Waiver does not get a fund source allocation. It is paid through MSS/PAWS

Note: In the example below, there are three 'LCL' and one 'WVR' Service.
Costing must be complete for all Service Lines before Finance approval can be requested

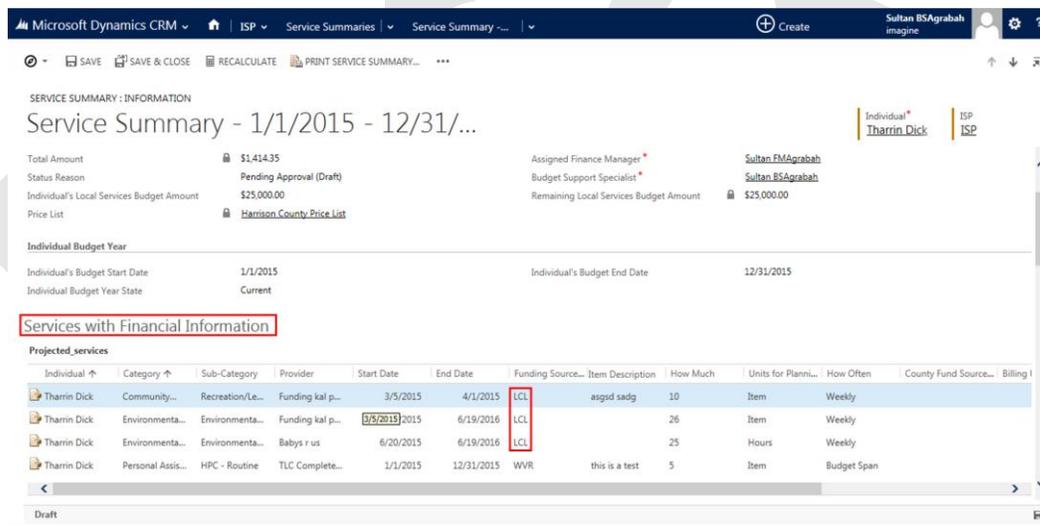


Figure 15 – Services with Financial Information

7. Costing

- a. Double click a "LCL" or "WVR" funding source to open the item for costing; it will open a 'Projected Service' window.

Note: Do not click on an underlined item. It hyperlinks to the column heading name.

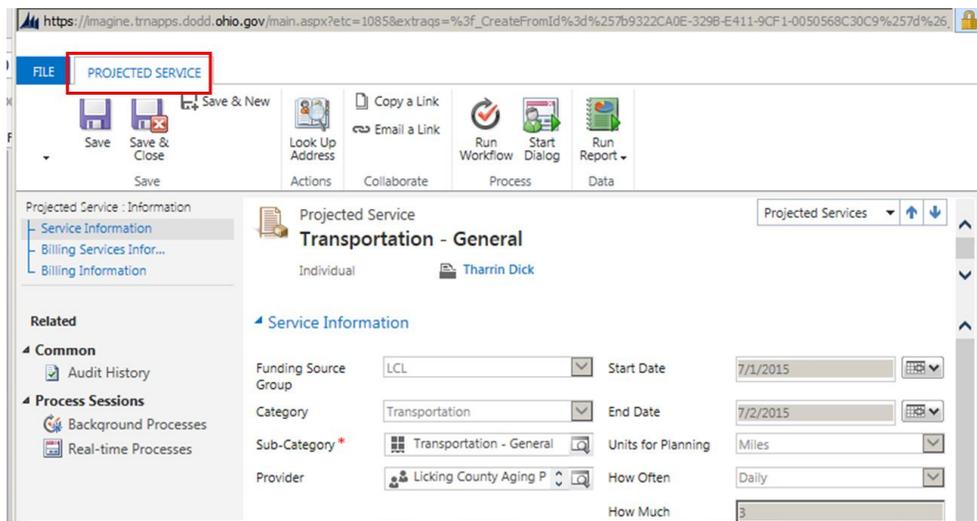


Figure 16 – Projected Services

- b. Scroll down and click the Billing Information link
- c. Click the County Fund Source look up function

Note: The County Fund Source Allocations (CFSA) will only display for selection if:

1. The Finance Manager has been assigned to the CFSA
2. The CFSA contains the specific service combination (Category & Sub-Category) as the Service Summary
3. The CFSA is within the time frame of the Service Summary

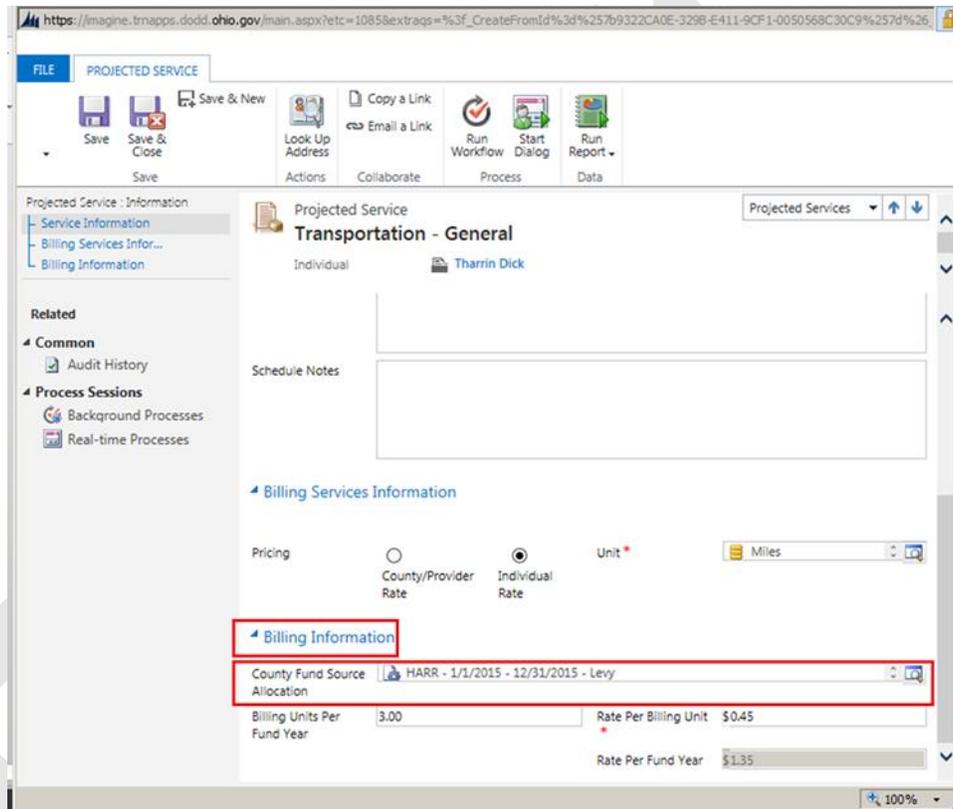


Figure 17 – Projected Services – Billing Information

- d. Pricing will default to the County/Provider rate. If Individual Rate is selected, rate per billing unit can be modified (See Fig Projected Services – Individual Rate Selected)
 - e. “Billing Units per Fund Year” must be calculated and entered by the Waiver/Budget Specialist
8. Click Save and Close

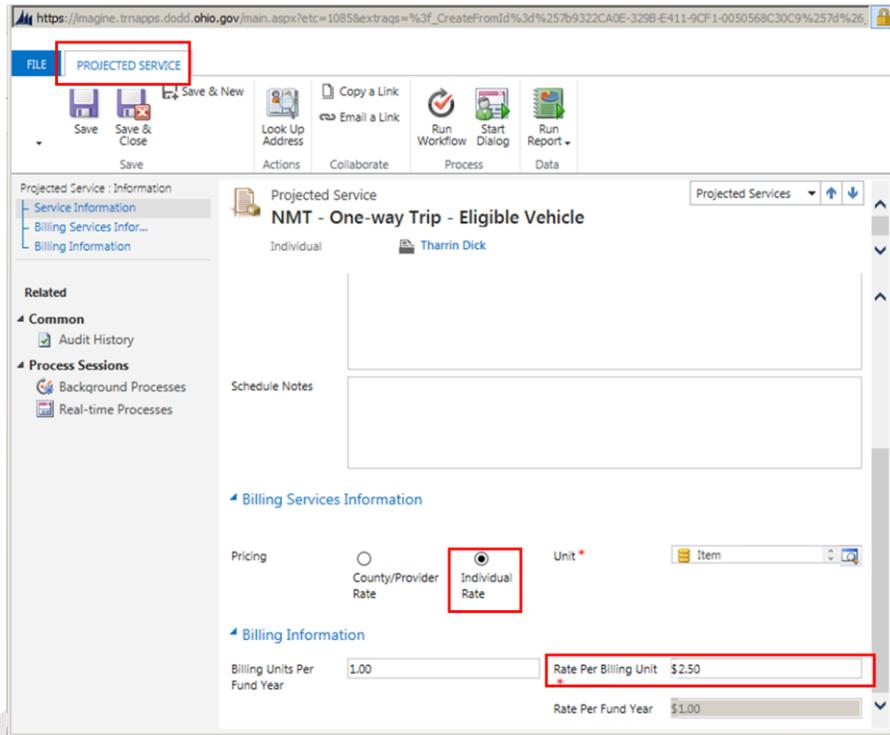


Figure 18 – Projected Services - Individual Rate Selected

Send Notification Costing is Complete:

Running the on-demand work flow will notify the SSA that costing for services is completed and the SSA can now request funding approval.

1. While on the Service Summary, select the more commands (...) to Run Work Flow that will send a notification to the SSA that costing is complete.

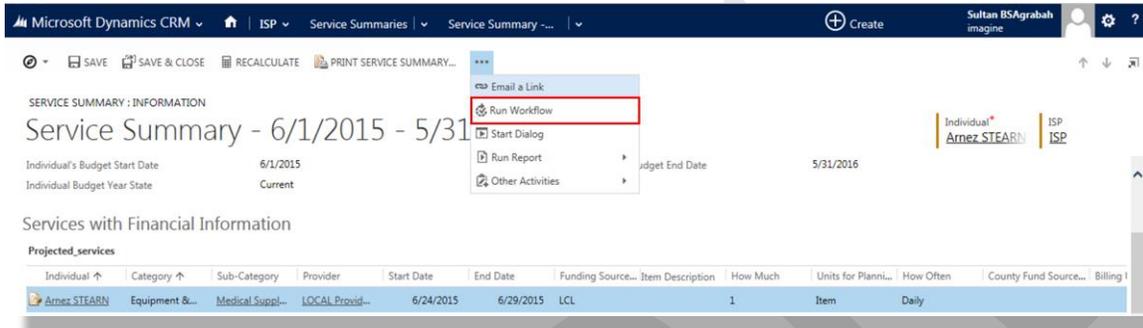


Figure 19 – Run Workflow for Service Summary

2. Verify that 'Notification – To Assigned SSA – Cost Projections Completed' is selected
3. Select 'Add' button to send the notification

Note: This step moves the Service Summary phase from 'Working Draft' to 'Pending Approval'
This is the phase from which the Service Summary can be printed.

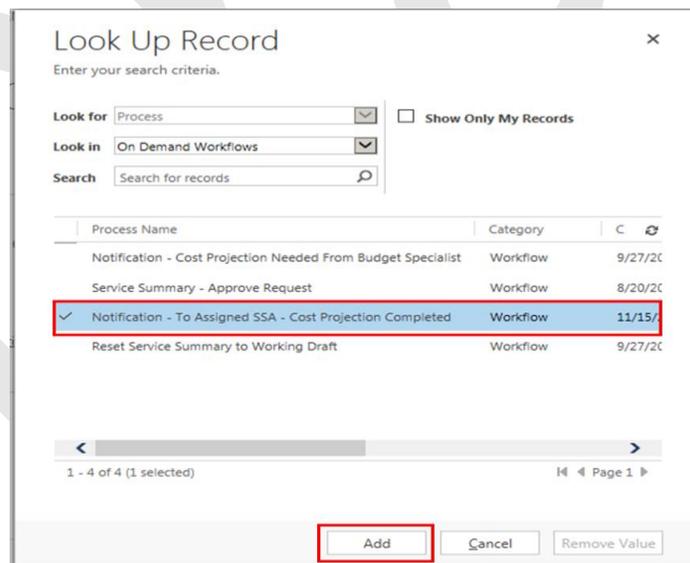


Figure 20 – Work Flow – Send Notification Costing is Complete

Printing the Service Summary

The result of printing the Service Summary produces a .pdf file.

1. Sign on to *imaginIS* as Budget Support Specialist
2. Start from the Service Summary for which costing was completed
3. Select More Commands (...)
 - a. Click the Run Report link
 - i. There are 3 phases/version of the service summary that can be printed.
 1. Draft
 2. Agreement
 3. Completed
 - ii. Click the version you wish to print and it will display as a PDF on screen.

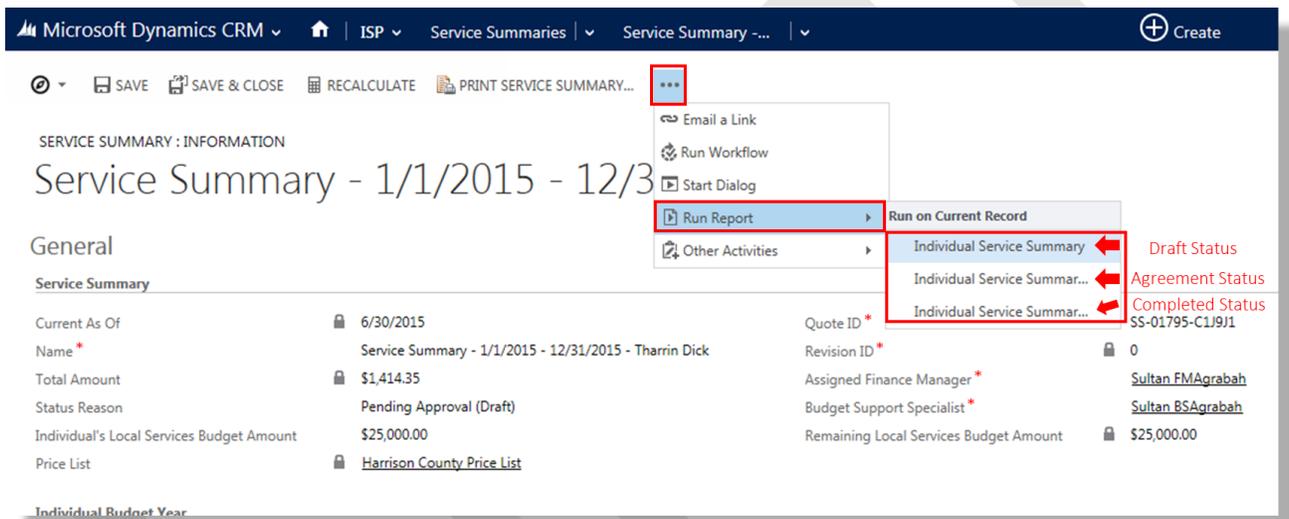


Figure 21 – Print Service Summary

Resetting the Service Summary to Draft

The Service Summary can be reset to “Working Draft” from either “Pending Approval” or “Completed Approved” status. This allows the Budget Support Specialist to enter costing for services again.

1. Sign on to *imaginIS* as Budget Support Specialist
2. Click the IMAGINE down arrow
3. Click the INDIVIDUALS Tile

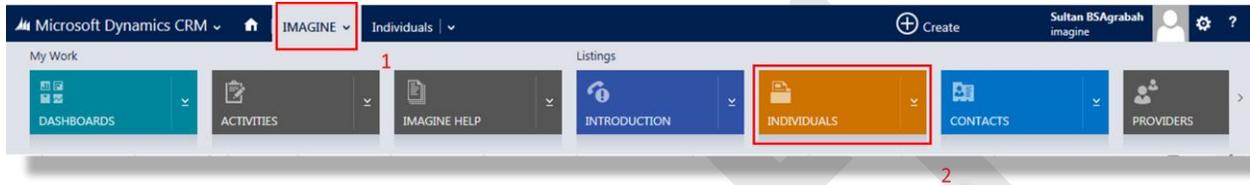


Figure 22 – Individual Tiles

4. Search for and click on the desired Individual to open the record

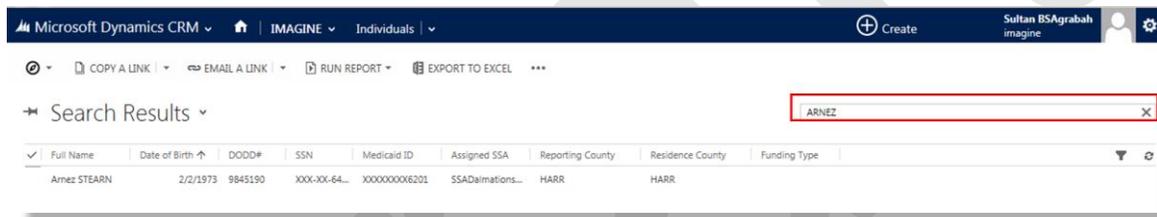


Figure 23 – Search and Click on Individual

5. Click the drop down to the right of the sub grid and select “Service Summary Associated View Dashboard”
6. Click on Current Service Summary to open

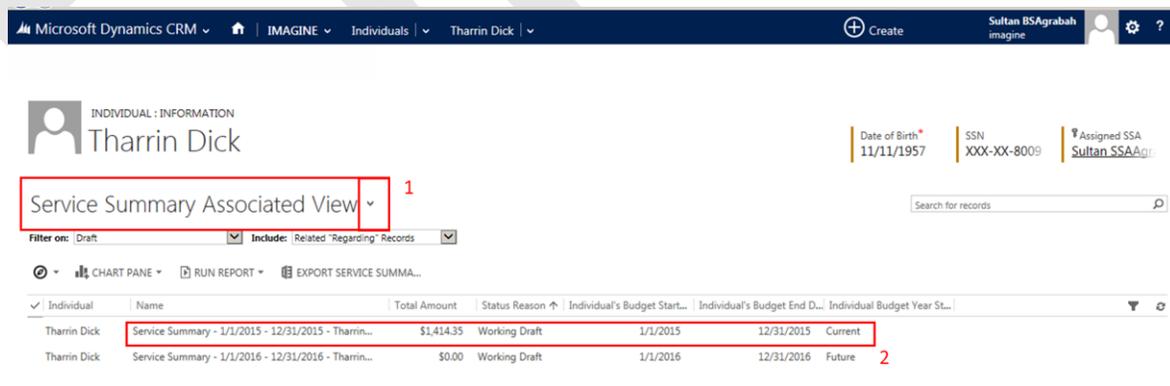


Figure 24 – Service Summary Associated View

7. Click on more commands (...)
8. Click the Run Workflow command

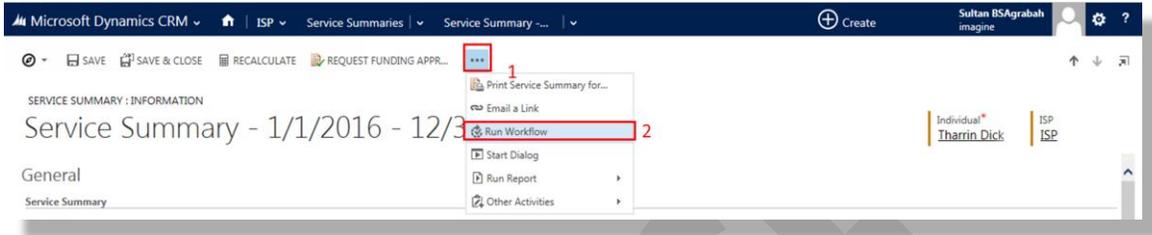


Figure 25 – Work flow - Reset to Working draft – Part 1

9. Check Mark “Reset Service Summary to Working Draft”
10. Click “Add” Button to initiate the work flow

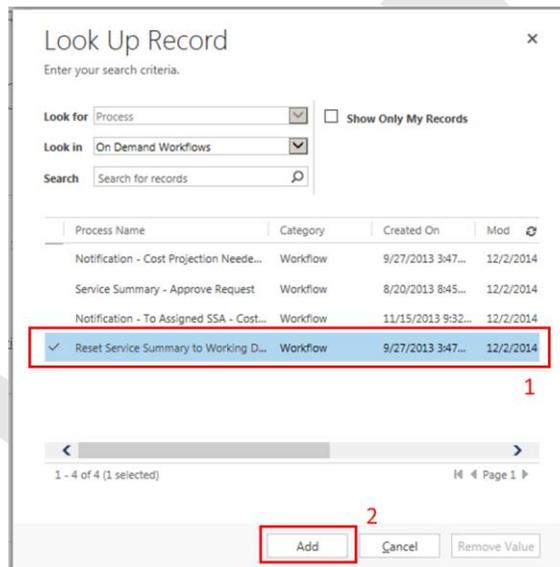


Figure 26 – Work flow - Reset to Working draft – Part 2

11. Click "OK" on confirmation Dialogue window
12. Close Service Summary and click the refresh button to refresh the list of Individuals
13. Notice that the status reason of the Service Summary has been reset to Working Draft

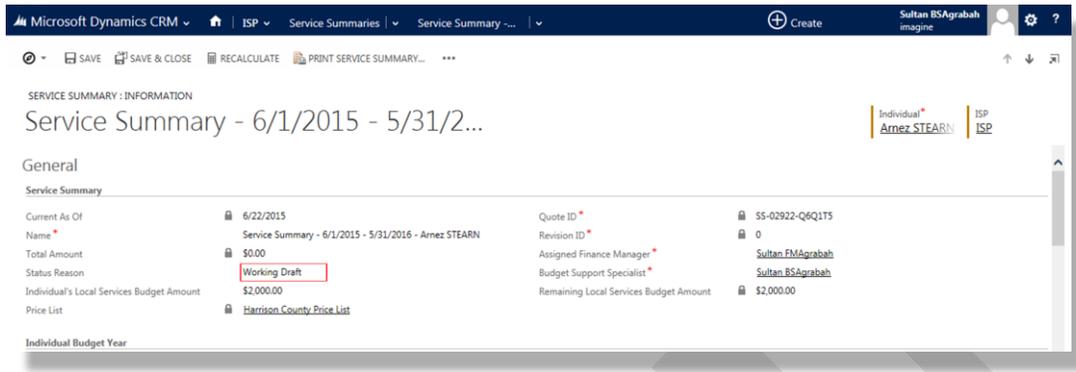


Figure 27 – Status Change Verification

Mark Notification Complete

Notifications do not disappear on their own, however they will disappear when marked to complete. Following the below steps to make a notification complete.

1. Sign on to *imaginIS* as Budget Support Specialist
2. Ensure you are on the Budget Support Specialist Financial Dashboard
3. Scroll down to My Notifications

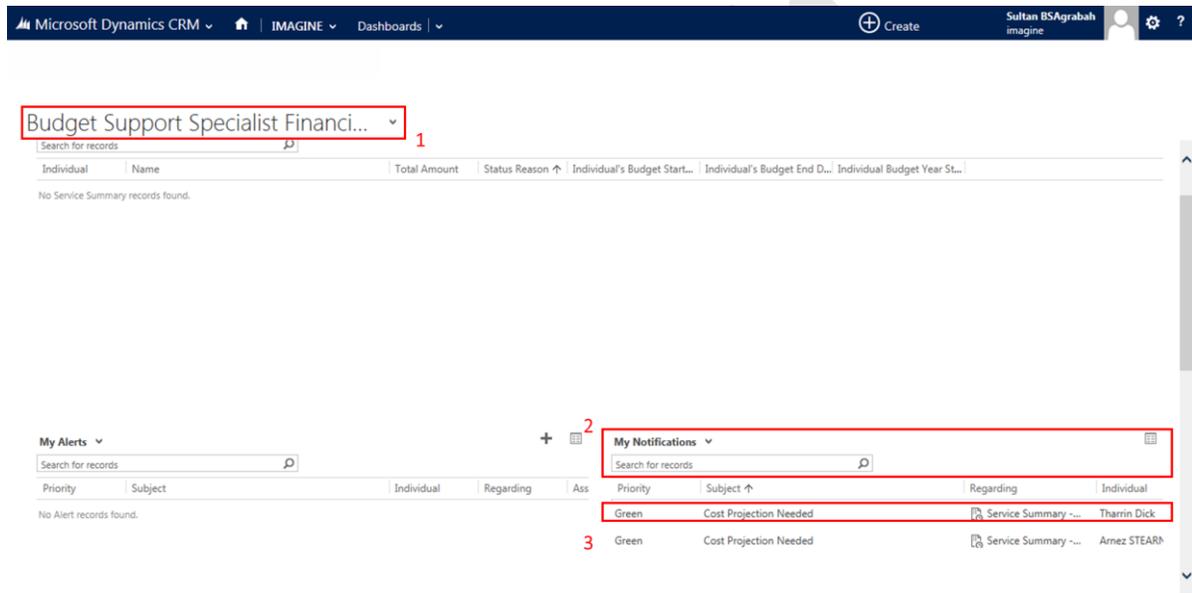


Figure 28 – Scrolling to Notifications

4. Click on the notification to open
5. Select Mark Complete

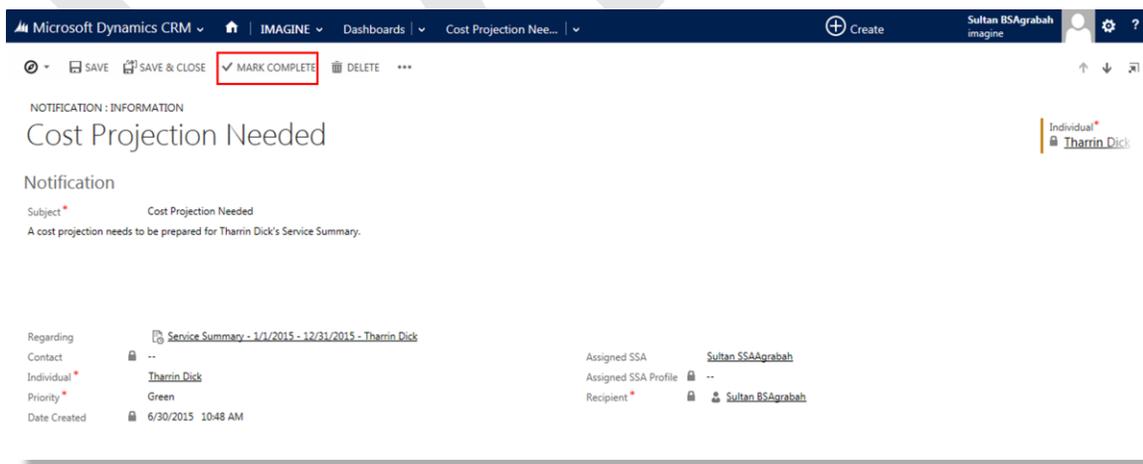


Figure 29 – Mark Notification Complete