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# Budget Support Specialist

July 02, 2015

DODD

# Contents

## Overview

Setup Service Summary for an Individual

Costing

Send Notification Costing is Complete

Print The Service Summary

Questions

# Overview (Class Structure)

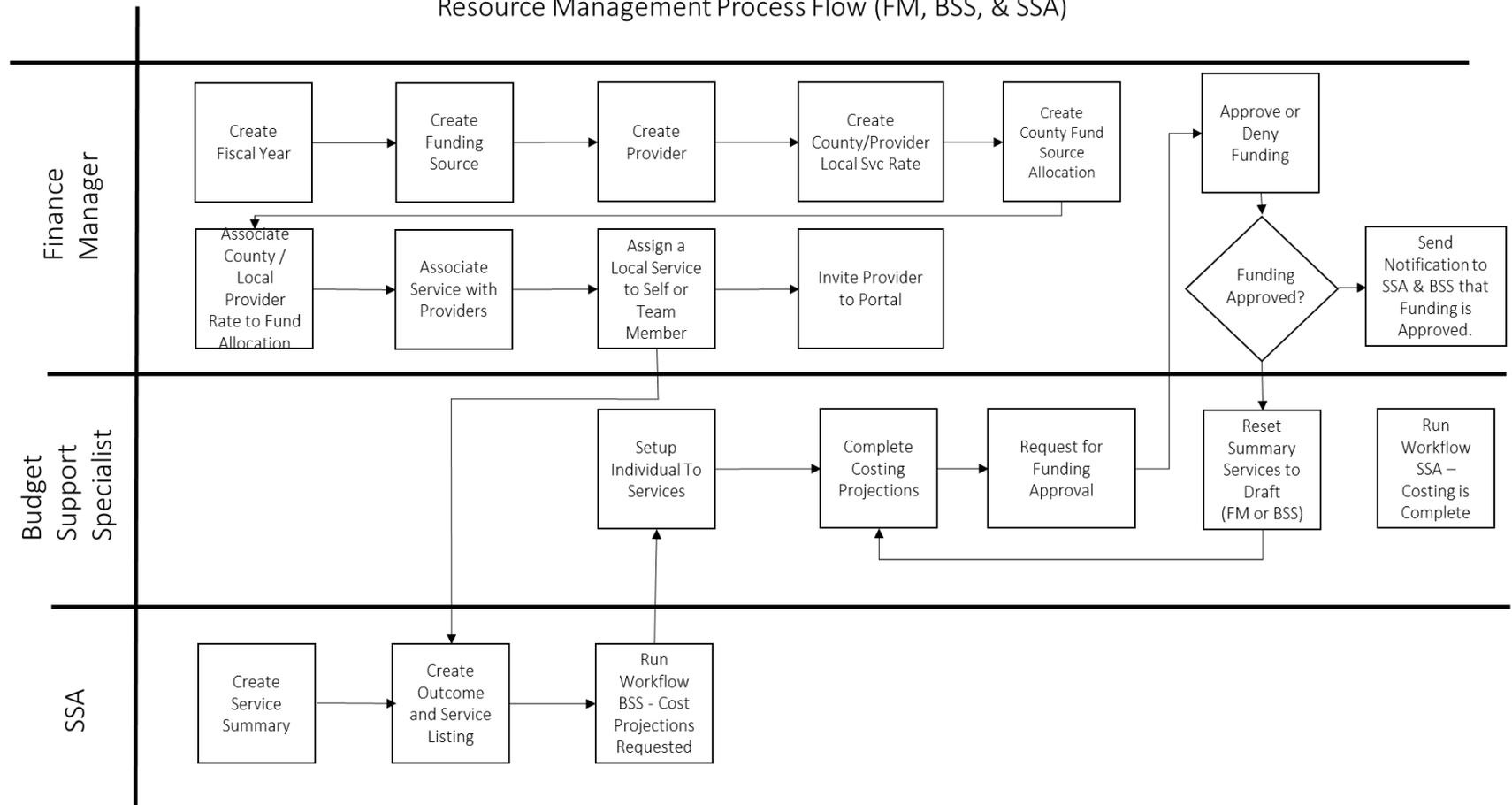
- Learning by hearing AND by doing
- Buddy System (help your neighbor)
- No “One” left behind

# Overview (*imaginelS* and you)

- ***imaginelS*** Roles vs Your Job Title
  - There is no correlation between the role name in ***imaginelS*** and your job title.
  - ***imaginelS*** roles are not functional job description or organizational titles.
  - There is absolutely no reason to perform an agency restructure to fit the ***imaginelS*** roles.
  - One person can have the authorization of multiple roles in ***imaginelS***

# Overview (Role Relationships)

Resource Management Process Flow (FM, BSS, & SSA)



# Overview (BSS Role)

**We want fiscal sustainability:**

**The system does not have enough money to support people in the coming years.**

**It's not a choice about considering other resources first. We must do our part to make sure we are partnering with other resources in order to be able to meet the future needs.**

**The county board cannot meet everyone's level of need alone. It takes a village: our community partners, families, home health, state plan services, as well as a network of donations and volunteers within the community.**

# Overview (BSS Role)

## ***Budget Support Specialist Role in imagineIS***

- Ensure the team looks at community resource funding before local or waiver funding
- Review and provide costing for services

# Overview

Use the supplied IDs to  
Sign on To *imaginelS* as  
Budget Support Specialist

# Set Default Dashboard

Microsoft Dynamics CRM | IMAGINE | Dashboards | Create | Sultan BSAgrabah imagine

SAVE AS NEW REFRESH ALL ADVANCED FIND

Budget Support Specialist Financi... 1

- System Dashboards
- Agreement Tracking Dashboard
- Billing Specialist Dashboard
- Budget Support Specialist Financial Dashboard**
- County Transfers
- Customer Service Representative Social Dashboa...
- Eligibility Specialist Dashboard

Total Amount	Status Reason ↑	Individual's Budget Start...	Individual's Budget End D...	Individual Budget Year St...
--------------	-----------------	------------------------------	------------------------------	------------------------------

Microsoft Dynamics CRM | IMAGINE | Dashboards | Create | Sultan BSAgrabah imagine

SAVE AS NEW SET AS DEFAULT REFRESH ALL ...

Budget Support Specialist Financi... 2

My Service Summaries

My Service Summaries

Search for records

Individual	Name	Total Amount	Status Reason ↑	Individual's Budget Start...	Individual's Budget End D...	Individual Budget Year St...
No Service Summary records found.						

# Set Default Dashboard

The screenshot shows the Imagine dashboard interface. At the top, there is a navigation bar with a home icon, the text 'IMAGINE', and a 'Dashboards' dropdown menu. On the right side of the navigation bar, there is a plus sign icon, the user profile 'Little BSJohn imagine', a settings gear icon, and a help question mark icon. Below the navigation bar, there are several utility icons: a clock, 'SAVE AS', 'NEW', 'REFRESH ALL', and 'ADVANCED FIND'. The main content area is titled 'Budget Support Specialist Financi...' with a dropdown arrow. Below this title, there are three summary sections, each with a search bar and a table header. The 'My Service Summaries' section shows 'No Service Summary records found.' The 'My Alerts' section shows 'No Alert records found.' The 'My Notifications' section shows one notification: 'Green Cost Projection Needed' with a 'Service' icon. A vertical scrollbar is visible on the right side of the dashboard.

# *imaginelS* Navigation (Terms)

**CRM:** Microsoft Dynamics CRM (customer relationship management) is the Microsoft platform that the imagine Information System was built on.

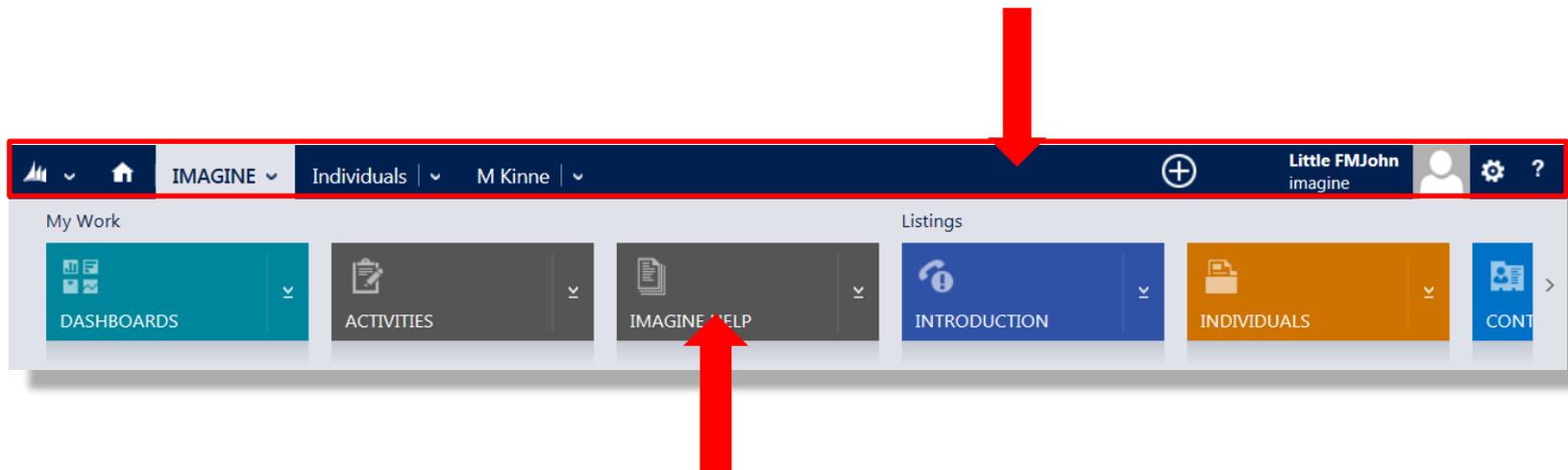
**Portal:** It is the part of ImaginelS that Individuals, family members, guardians, and providers use.

**Dashboard:** An “at a glance” view of information. Depending on the role, it shows the necessary sub grids, alerts, notifications, and tasks.

**Front Page:** This is the Individual’s (Facebook) page that is seen when first entering *ImaginelS*.

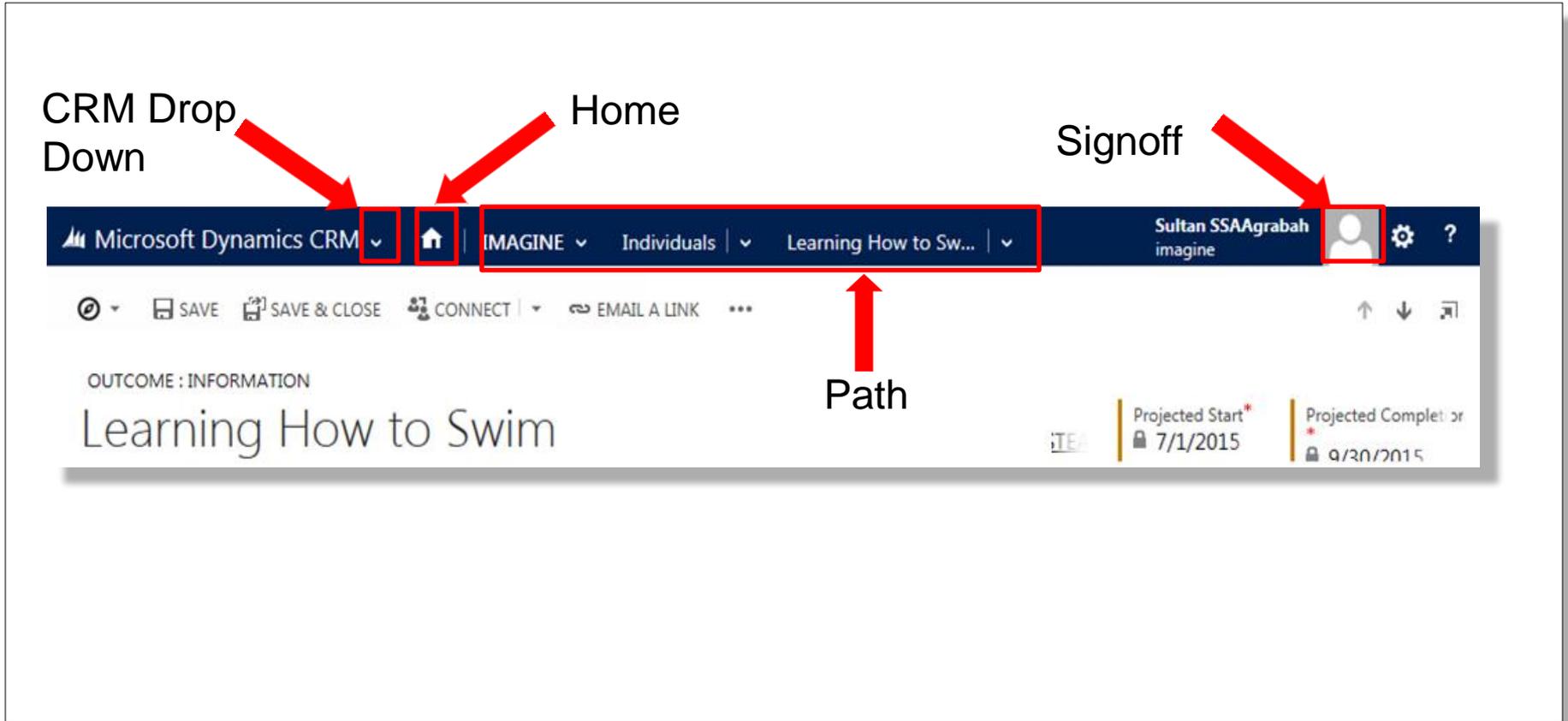
# *imagine*S Navigation (Terms)

**Navigation bar:** The dark blue bar across the top used for navigation.



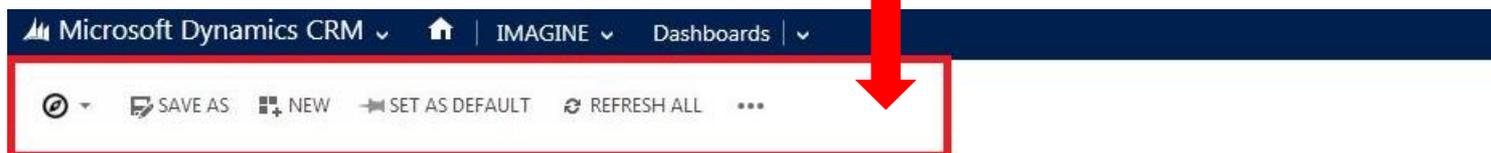
**Tiles:** When a down arrow is clicked in the navigation bar, a row of tiles will display. To go to that section of the system, click on a tile.

# imagineIS Navigation (Terms)



# imagineIS Navigation (Terms)

**Ribbon:** The ribbon contains the tools to work within a section of the navigation bar.



SSA Caseload View ▾

Dropdown arrow

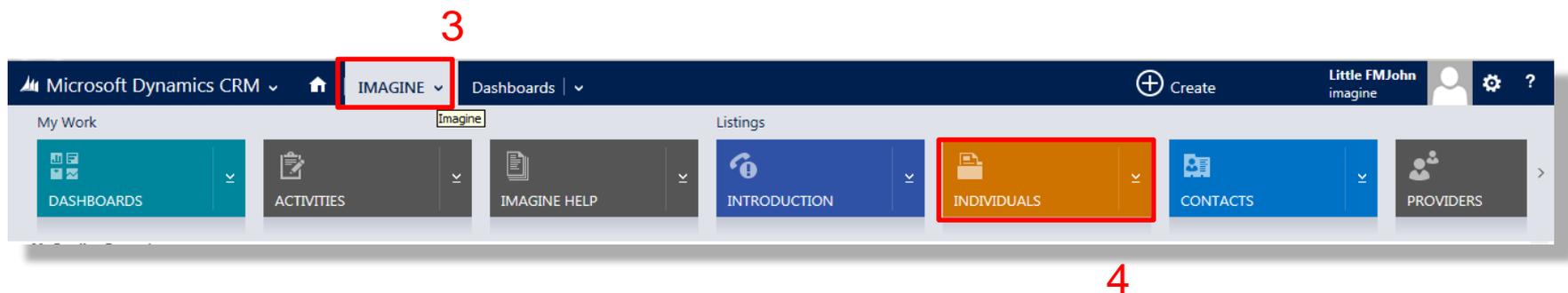
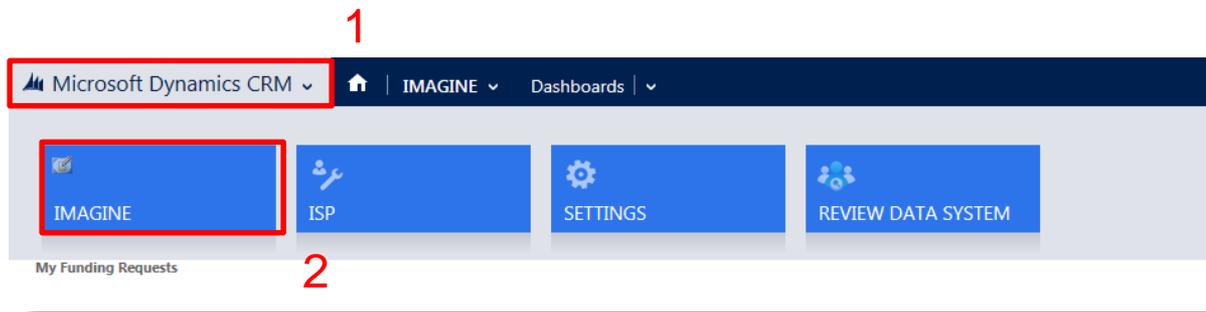
Search for records

Full Name	Date of Birth ↑	DODD#	SSN	Medicaid ID	Assigned SSA	Reporting County	Residence County
John Doe	1/1/1975	6671882			Sherry Knox	FAIR	FAIR
Joshua Ross	1/18/1990	6671884	XXX-XX-3333	XXXXXXXXX9123	Sherry Knox	FAIR	FAIR
Stephan Short	2/28/1993	6671883	XXX-XX-6666	XXXXXXXXX2333	Sherry Knox	FAIR	FAIR
Mark Crawford	2/1/1997	6671879	XXX-XX-0987	XXXXXX7399	Sherry Knox	FAIR	FAIR

**Sub grid:** Table of information.

# imagineIS Navigation (Example)

How to navigate to an individuals front page...



# imagineIS Navigation (Example)

IMAGINE Individuals

SEND DIRECT EMAIL COPY A LINK EMAIL A LINK RUN WORKFLOW

Active Individuals Search for records

Full Name	Date of Birth ↑	DODD#	SSN	Medicaid ID	Assigned SSA	Reporting County	Residence County	Date of Death
M Kinne	2/12/1946	9062017	XXX-XX-7778	XXXXXXXX1301		HARR	HARR	
NEHAMIAH VA...	3/24/1946	3126030	XXX-XX-3410	XXXXXXXX1201	SSAHiss Sir	HARR	HARR	

Microsoft Dynamics CRM IMAGINE Individuals M Kinne

SAVE SAVE & CLOSE CONNECT EMAIL A LINK

INDIVIDUAL : INFORMATION  
M Kinne

Date of Birth\* 2/12/1946 SSN XXX-XX-7777 Assigned SSA --

There are no Case Notes for this individual. Please add if any.

- Front Page
- Case Notes
- Addresses
- More About Me
- Discovery Quick Summary
- Individual Quick Summary

Individual's Front Page

# imaginelS Navigation (Mandatory Fields)

Microsoft Dynamics CRM | SETTINGS | County Fund Sourc... | New County Fund S...

SAVE SAVE & CLOSE + NEW

COUNTY FUND SOURCE/ALLOCATION : INFORMATION

## New County Fund Source/Allocation

### General

County*	HARR	Funding Source*	<input type="text"/>
County Fiscal Year*	--	County Number	--
CFSA Start Date	--	Assigned Finance Manager	--
CFSA End Date	--	Account Number/GL Code	--
CFS Code	--		
Owner*	<u>Little FMJohn</u>		
Total Committed	--		

Locked Field – County is a locked field  
An Asterisks (\*) indicates a mandatory field  
County, Fiscal year, Owner, and Funding Source are mandatory fields.

# Contents

Overview

Setup Service Summary for an Individual

Costing

Send Notification Costing is Complete

Print The Service Summary

Questions

# Setup Service Summary for an Individual

## Service Summary:

- Contains the list of services (LCL & WVR) and the budget and date span for which those services will be provided.

## Time Span:

- Typically the Entire Fiscal Year (Current)
- Next Fiscal Year (Future)

## Steps for setting up a Service Summary

- Assign Finance Manager
- Assign Budget Support Specialist
- Assign Budget Amount
- Assign Start and End Dates

# Setup Service Summary for an Individual

1

Microsoft Dynamics CRM | HOME | IMAGINE | Dashboards | Create | Little BSJohn imagine

My Work: DASHBOARDS, ACTIVITIES, IMAGINE HELP, INTRODUCTION, INDIVIDUALS, CONTACTS, PROVIDERS

2

3

Microsoft Dynamics CRM | HOME | IMAGINE | Individuals | Create | Little BSJohn imagine

COPY A LINK | EMAIL A LINK | RUN REPORT | EXPORT TO EXCEL

Search Results | Search: arn

Full Name	Date of Birth	DODD#	SSN	Medicaid ID	Assigned SSA	Reporting County	Residence County	Funding Type
Arnez STEARN	2/2/1973	9845190	XXX-XX-64...	XXXXXXXX6201	SSADalmations...	HARR	HARR	

4

5

Microsoft Dynamics CRM | HOME | IMAGINE | Individuals | Arnez STEARN | Create | Little SSAJohn imagine

ISP: RECURRING APPOINTMEN..., PAYOR DETAILS, LEARNING LOGS, ESSENTIAL HEALTH, OUTCOMES, SERVICE SUMMARIES, SERVICE LISTINGS

# Setup Service Summary for an Individual

Microsoft Dynamics CRM | IMAGINE | Individuals | Arnez STEARN | Create | Sultan BSAgrabah imagine

INDIVIDUAL : INFORMATION  
Arnez STEARN

Date of Birth\* 2/2/1973 | SSN XXX-XX-6428 | Assigned SSA SSADalations

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 D...	Individual Budget Year St...
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

# Setup Service Summary for an Individual

SAVE SAVE & CLOSE RECALCULATE REQUEST FUNDING APPR...

SERVICE SUMMARY : INFORMATION

Service Summary - 7/1/2015 - 12/31/...

Individual\* **BETHENY CAIN** | ISP **ISP**

## General

### Service Summary

Current As Of	7/24/2015	Quote ID *	SS-02763-G9D9M5
Name *	Service Summary - 7/1/2015 - 12/31/2015 - BETHENY CAIN II	Revision ID *	0
Total Amount	\$100,001.00	Assigned Finance Manager *	Little FMJohn
Status Reason	Working Draft	Budget Support Specialist *	Little BSJohn
Individual's Local Services Budget Amount	\$550,000.00	Remaining Local Services Budget Amount	\$450,000.00
Price List	Harrison County Price List		

### Individual Budget Year

Individual's Budget Start Date	7/1/2015	Individual's Budget End Date	12/31/2015
Individual Budget Year State	Current		

## Services with Financial Information

### Projected\_services

Individual ↑	Category ↑	Sub-Category	Provider	Start Date	End Date	Funding Source...	Item Description	How Much	Units for Planni...	How Often	County Fund Source...	Billi
BETHENY CAL...	Professional S...	Counseling Se...	1-Awesome P...	7/28/2015	8/27/2015	WVR	Counseling to...	20	Hours	Daily		
BETHENY CAL...	Transportation	City Bus Pass	ABC MEDICAL...	7/29/2015	8/6/2015	LCL	Go for a drive...	50	Miles	Daily	HARR - 6/1/2015 -...	

# Setup Service Summary for an Individual

SAVE | SAVE & CLOSE | RECALCULATE | REQUEST FUNDING APPR...

SERVICE SUMMARY : INFORMATION

## Service Summary - 7/1/2015 - 12/31/...

Individual\* **BETHENY CAI** | ISP **ISP**

Name*	Service Summary - 7/1/2015 - 12/31/2015 - BETHENY CAIN II
Total Amount	\$100,444.44
Status Reason	Working Draft
Individual's Local Services Budget Amount	\$550,000.00
Price List	Harrison County Price List

Revision ID*	0
Assigned Finance Manager*	Little FMJohn
Budget Support Specialist*	Little BSJohn
Remaining Local Services Budget Amount	\$450,000.00

Individual Budget Year

Individual's Budget Start Date	7/1/2015	Individual's Budget End Date	12/31/2015
Individual Budget Year State	Current		

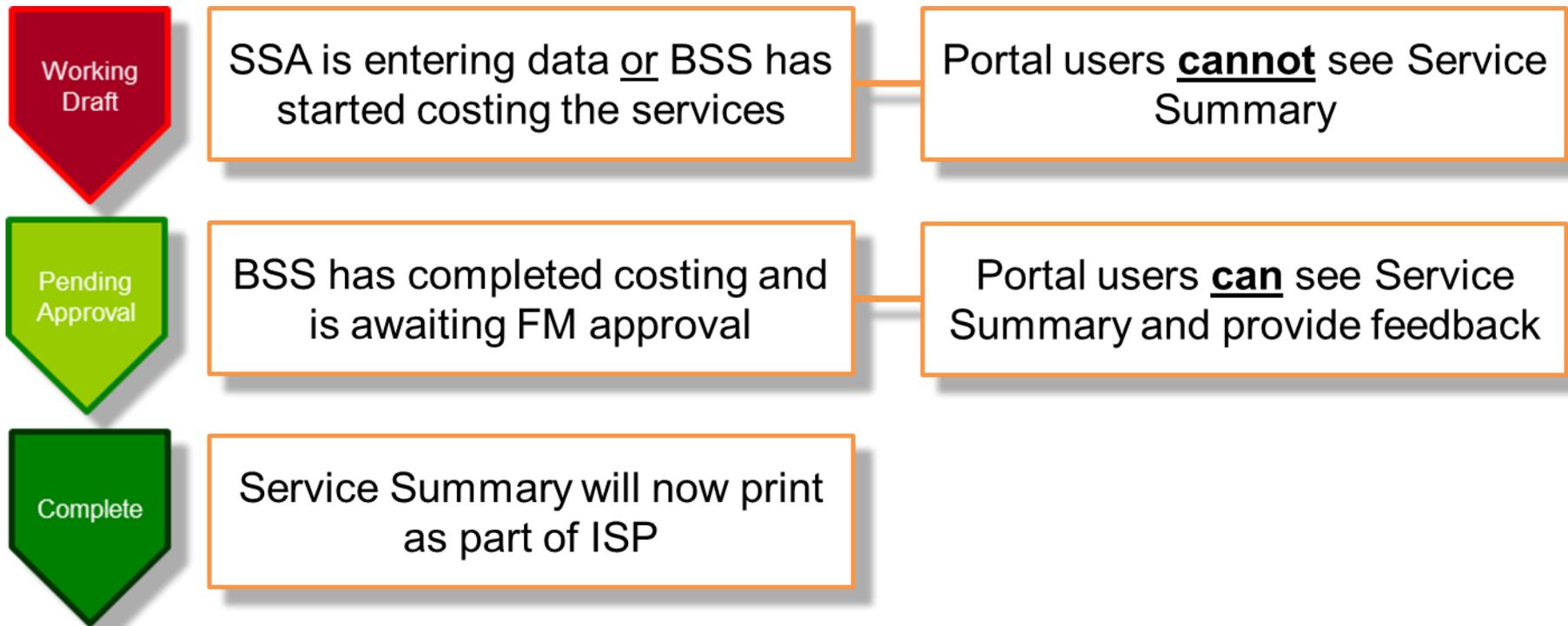
### Services with Financial Information

Projected\_services

Individual ↑	Category ↑	Sub-Category	Provider	Start Date	End Date	Fundin...	Item Descri...	How...	Units for...	How Often...	County Fund Sour...	Billing U...	Rate Per Billing...	Rate Amount Per...
BETHENY CAI...	Professional S...	Counseling Se...	1-Awesome P...	7/28/2015	8/27/2015	WVR	Counseli...	20	Hours	Daily		444.44	\$1.00	\$444.44
BETHENY CAI...	Transportation	City Bus Pass	ABC MEDICAL...	7/29/2015	8/6/2015	LCL	Go for a...	50	Miles	Daily	HARR - 6/1/201...	500.00	\$200.00	\$100,000.00

# Service Summary Phases

BSS – Budget Support Specialist, FM – Finance Manager



# Contents

Overview

Setup Service Summary for an Individual

Community Resources

Costing

Send Notification Costing is Complete

Print The Service Summary

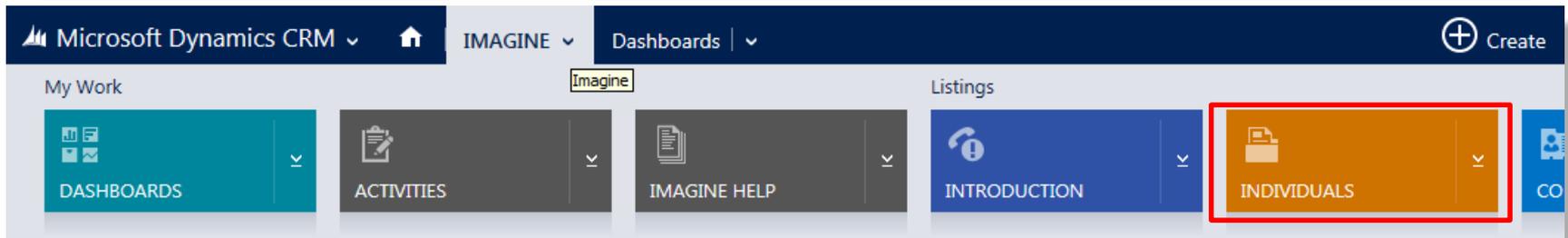
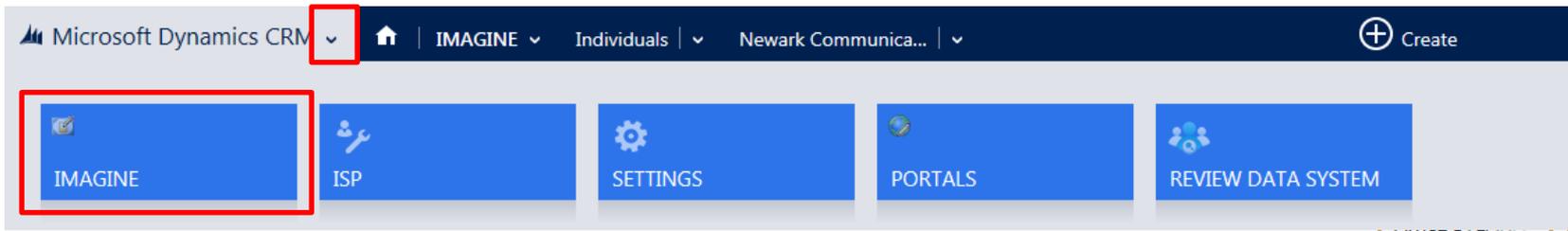
Questions

# Community Resources in *imaginels*

## Natural/Community/Other Contributing Resources

Looking for other type of funding available for servicing the individual.

Go to the Outcome for the Individual



# Community Resources in *imaginels*

Microsoft Dynamics CRM | IMAGINE | Individuals | Create | Sultan BSAgrabah imagine

1 – Search for the individual

ARNEZ

Full Name	Date of Birth	DODD#	SSN	Medicaid ID	Assigned SSA	Reporting County	Residence County	Date of Death	Termination Dat...
Tharrin Dick	11/11/1957	4655672	XXX-XX-8009	XXXXXXXX9201	Little SSAJohn	HARR	HARR		
NICKEITA Guilda	9/17/1959	9189355	XXX-XX-2455	XXXXXXXX0799		HARR	HARR		
Willtrell McMon...	1/26/1960	4664617	XXX-XX-4087	XXXXXXXX2901		HARR	HARR		
AKEEN Vukovich	2/4/1961	8508538	XXX-XX-1676	XXXXXXXX9601	Little SSAJohn	HARR	HARR		
MYQUL SIDERS II	5/20/1962	9146409	XXX-XX-7063	XXXXXXXX9699		HARR	HARR		
AME SCHLAG	4/6/1963	9336838	XXX-XX-0908	XXXXXXXX3901	WALT DISNEY	HARR	HARR		
Ja I Rieve	3/17/1965	9145839	XXX-XX-2816	XXXXXXXX7499	SSADalmations...	HARR	HARR		
Esha Mwanni	7/8/1967	9001065	XXX-XX-7971	XXXXXXXX5699		HARR	HARR		

2 – Click on Individual record to open Front Page

3 – Select the drop down next to the name

Microsoft Dynamics CRM | IMAGINE | Individuals | Arnez STEARN | Create | Sultan BSAgrabah imagine

ISP

PAYOR DETAILS | LEARNING LOGS | ESSENTIAL HEALTH | **OUTCOMES** | SERVICE SUMMARIES | SERVICE LISTINGS | ISP

4 – Select Outcomes

# Community Resources in *imaginels*

Microsoft Dynamics CRM | HOME | IMAGINE | Individuals | Arnez STEARN | Create | Sultan BSGrabah imagine

INDIVIDUAL : INFORMATION  
 Arnez STEARN

Date of Birth\* 2/2/1973 | SSN XXX-XX-6428 | Assigned SSA [SSADalmation](#)

Outcome Associated View

CHART PANE | RUN REPORT | EXPORT OUTCOMES

Individual	Current As Of	Status	Name	Discovered In	Desired Outcome	So that/In order to	Projected Start...	Projected Comp...	Priority	Emergency
Arnez STEARN	7/15/2015	Draft Distributed	Learning How to Swim	Communication & Lear...	To be able to swim 100...	Be able to swi...	7/1/2015	9/30/2015	3	No
Arnez STEARN	7/1/2015	Working Draft - Internal	Newark Communicatio...	Communication & Lear...	Arnez would like the ab...	Go to the libr...	6/23/2015	6/30/2015	3	No
Arnez STEARN	6/26/2015	Working Draft - Internal	Planning Worksheet	Communication & Lear...	To understand the Plan...	Better underst...	6/15/2015	6/30/2015	5	No

Select an Outcome

1 - 3 of 3 | Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

DODD# 9845190 Medicaid ID XXXXXXXX6201 Reporting County HARR

# Community Resources in *imaginels*

Microsoft Dynamics CRM | HOME | IMAGINE | Individuals | Planning Worksheet | Create | Sultan BSAgrabah imagine

EMAIL A LINK | RUN WORKFLOW | START DIALOG | RUN REPORT

OUTCOME : INFORMATION

## Planning Worksheet

Individual Arnez STEARN	Projected Start* 6/15/2015	Projected Completion* 6/30/2015
----------------------------	-------------------------------	------------------------------------

Outcomes

How and how often will progress towards this Outcome be reviewed?

Support Considerations

**Natural/Community/Other Contributing Resource**

Projected Services Information & Schedule

Feedback

# Community Resources in *imaginels*

Microsoft Dynamics CRM | IMAGINE | Individuals | Learning How to Sw... | Create | Sultan SSAAgrabah imagine

SAVE | SAVE & CLOSE | CONNECT | EMAIL A LINK

OUTCOME : INFORMATION

## Learning How to Swim

Individual: **Arnez STEA** | Projected Start: **7/1/2015** | Projected Completion: **9/30/2015**

Outcomes

How and how often will progress towards this Outcome be reviewed?

Support Considerations

Service/Support	Resource Name	Funding If Applicable
<b>Recreation</b> Comments/Level of Service YMCA Offers free swim lessons for those that live in the community. They cater specifically to those with disabilities.	YWCA	No Funding Required
<b>Transportation</b> Comments/Level of Service Arnez's Church is looking to get involved and suggested using Pete's Transportation. The Church will pay for their transportation services.	Pete's Transportation	\$25/Hour
--	--	--

Active | unsaved changes

# Contents

Overview

Setup Service Summary for an Individual

Community Resources

Costing

Send Notification Costing is Complete

Print The Service Summary

Questions

# Completing Cost Projections

The screenshot shows the Microsoft Dynamics CRM interface. At the top, the navigation bar includes 'Microsoft Dynamics CRM', 'IMAGINE', and 'Dashboards'. The user is logged in as 'Sultan BSGrabah' with the role 'imagine'. Below the navigation bar, there are options for 'SAVE AS', 'NEW', 'REFRESH ALL', and 'ADVANCED FIND'. The main content area shows a search for 'Budget Support Specialist Finan...'. On the left, there is a 'My Alerts' section with a search bar and a table showing 'No Alert records found.'. On the right, there is a 'My Notifications' section with a search bar and a table. The table in 'My Notifications' has columns for 'Priority', 'Subject', 'Regarding', and 'Individual'. It contains two rows of notifications, both with a 'Green' priority and 'Cost Projection Needed' subject. The first row's 'Regarding' field is 'Service Summary - ...' and the 'Individual' field is 'Tharrin Dick'. The second row's 'Regarding' field is 'Service Summary - ...' and the 'Individual' field is 'Arnez STEARN'. A red box highlights the 'My Notifications' section, and a red arrow points to the 'Service Summary - ...' notification in the first row.

1. Sign on as Budget Support Specialist  
2. Scroll down to My Notifications

3. Click on the Service Summary Notification to open

# Completing Cost Projections

Microsoft Dynamics CRM | HOME | IMAGINE | Dashboards | Cost Projection Nee... | Create | Sultan BSAgrabah | imagine

SAVE | SAVE & CLOSE | MARK COMPLETE | DELETE

NOTIFICATION : INFORMATION

## Cost Projection Needed

Individual\*  
Tharrin Dick

### Notification

Subject\* Cost Projection Needed  
A cost projection needs to be prepared for Tharrin Dick's Service Summary.

Regarding **Service Summary - 1/1/2015 - 12/31/2015 - Tharrin Dick**

Contact	--	Assigned SSA	Sultan SSAgrabah
Individual*	Tharrin Dick	Assigned SSA Profile	--
Priority*	Green	Recipient*	Sultan BSAgrabah
Date Created	6/30/2015 10:48 AM		

Activity Status: **Open**

Open

# Completing Cost Projections (LCL/WVR)

Microsoft Dynamics CRM | ISP | Service Summaries | Service Summary - ... | Create | Sultan BSAgrabah imagine

SAVE | SAVE & CLOSE | RECALCULATE | PRINT SERVICE SUMMARY...

SERVICE SUMMARY : INFORMATION  
Service Summary - 1/1/2015 - 12/31/... | Individual\* Tharrin Dick | ISP ISP

Services with Financial Information ← Scroll down to...and open

Projected\_services

Individual ↑	Category ↑	Sub-Category	Provider	Start Date	End Date	Funding Source...	Item Description	How Much	Units for Planni...	How Often	County Fund Source...	Billing I
Tharrin Dick	Transportation	Transportatio...	Licking Count...	7/1/2015	7/2/2015	LCL	Driving Process	3	Miles	Daily	HARR - 1/1/2015 -...	
Tharrin Dick	Transportation	NMT - One-w...	LICKING CO B...	1/1/2015	12/31/2015	WVR		1	Trip	Budget Span		
Tharrin Dick	Transportation	NMT - One-w...	LICKING CO B...	2/1/2015	8/1/2015	LCL		100	15 minutes	Weekly		
Tharrin Dick	Transportation	NMT - One-w...	LICKING CO B...	8/2/2015	11/1/2015	LCL		30	Hours	Weekly		

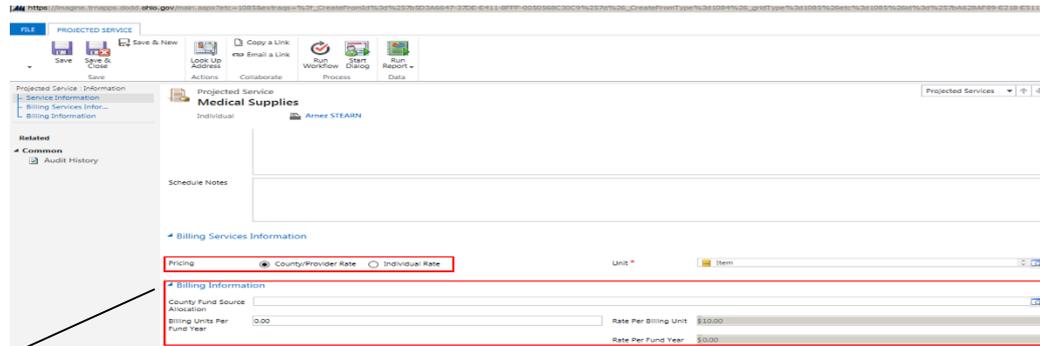
5 - 8 of 10 | Page 2

The Project Services were assigned by the SSA when the outcome was created.

# Completing Cost Projections

The screenshot shows the Microsoft Dynamics CRM interface for a 'Projected Service: Transportation - General'. The browser address bar indicates the URL: [https://imagine.trnapps.dodd.ohio.gov/main.aspx?etc=1085&extraqs=%3f\\_CreateFromId%3d%257b9322CA0E-329B-E411-9CF1-0050568C30C9%257d%26](https://imagine.trnapps.dodd.ohio.gov/main.aspx?etc=1085&extraqs=%3f_CreateFromId%3d%257b9322CA0E-329B-E411-9CF1-0050568C30C9%257d%26). The ribbon includes 'FILE' and 'PROJECTED SERVICE' tabs. The 'PROJECTED SERVICE' ribbon has sections for 'Save', 'Collaborate', 'Process', and 'Data'. The left navigation pane shows 'Projected Service : Information' with sub-items 'Service Information', 'Billing Services Infor...', and 'Billing Information'. The main area displays 'Projected Service Transportation - General' by 'Tharrin Dick'. It includes 'Schedule Notes' and 'Billing Services Information' sections. The 'Billing Services Information' section shows 'Pricing' with radio buttons for 'County/Provider Rate' (selected) and 'Individual Rate', and a 'Unit \*' dropdown set to 'Miles'. The 'Billing Information' section shows 'County Fund Source Allocation' as 'HARR - 1/1/2015 - 12/31/2015 - Levy', 'Billing Units Per Fund Year' as '3.00', 'Rate Per Billing Unit' as '\$0.45', and 'Rate Per Fund Year' as '\$1.35'. The bottom right corner shows a zoom level of 100%.

# Completing Cost Projections



### Billing Services Information

Pricing  County/Provider Rate  Individual Rate Unit\* Miles

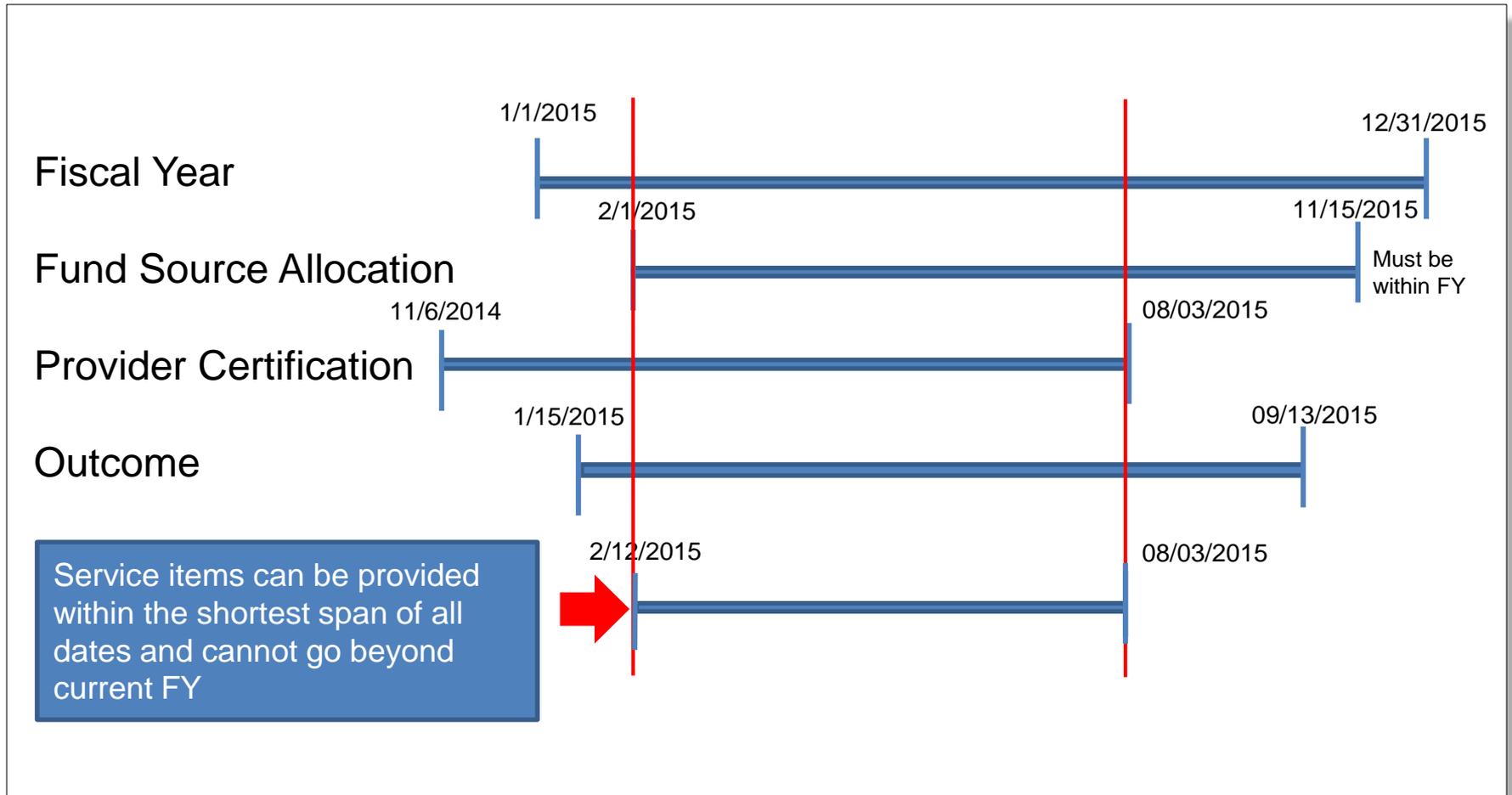
County Fund Source Allocation  Rate Per Billing Unit \$3,000

Billing Units Per Fund Year  Rate Per Fund Year \$9,000

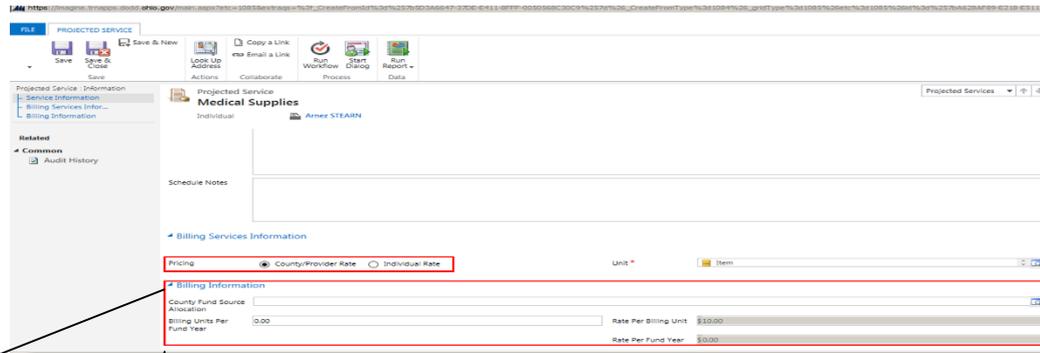
### Billing Information

- Select when costing a **local service**.  
CFSA Will not be a choice when costing WVR services.
- The County Fund Source Allocation selection will only display if:
- The FM has been assigned to the Local Service
  - The service is associated with a provider with matching category and sub category
  - The CFSA is within the time frame of the Service Summary

# Completing Cost Projections (Date Ranges)



# Completing Cost Projections (Billing Services)



### Billing Services Information

Pricing  County/Provider Rate  Individual Rate Unit\* Miles

County Fund Source Allocation HARR - 1/1/2015 - 12/31/2015 - Levy

Billing Units Per Fund Year 3.00 Rate Per Billing Unit \$0.45

Rate Per Fund Year \$1.35

Selecting Individual Rate Opens up Rate per Billing Unit for Edit

# Contents

Overview

Setup Service Summary for an Individual

Costing

Send Notification Costing is Complete

Print The Service Summary

Questions

# Send Notification Costing is complete

The screenshot displays the Microsoft Dynamics CRM interface for a Service Summary record. The record title is "Service Summary - 6/1/2015 - 5/31/2016". The "Run Workflow" option in the context menu is highlighted with a red box. The record details show "Individual's Budget Start Date" as 6/1/2015 and "Budget End Date" as 5/31/2016. The user "Arnez STEARN" is associated with the record. Below the record details, there is a section titled "Services with Financial Information" containing a table of projected services.

Microsoft Dynamics CRM | ISP | Service Summaries | Service Summary - ... | Create | Sultan BSGrabah imagine

SAVE | SAVE & CLOSE | RECALCULATE | PRINT SERVICE SUMMARY...

Service Summary - 6/1/2015 - 5/31/2016

Individual's Budget Start Date: 6/1/2015 | Budget End Date: 5/31/2016

Individual Budget Year State: Current

Individual\*: Arnez STEARN | ISP

Services with Financial Information

Projected\_services

Individual	Category	Sub-Category	Provider	Start Date	End Date	Funding Source...	Item Description	How Much	Units for Planni...	How Often	County Fund Source...	Billing I
Arnez STEARN	Equipment &...	Medical Suppl...	LOCAL Provid...	6/24/2015	6/29/2015	LCL		1	Item	Daily		

# Send Notification Costing is complete

Look Up Record

Enter your search criteria.

Look for    Show Only My Records

Look in

Search

Process Name	Category	C	🔄
Notification - Cost Projection Needed From Budget Specialist	Workflow	9/27/20	
Service Summary - Approve Request	Workflow	8/20/20	
✓ Notification - To Assigned SSA - Cost Projection Completed	Workflow	11/15/20	
Reset Service Summary to Working Draft	Workflow	9/27/20	

<  >

1 - 4 of 4 (1 selected)

Same Workflow Process for:

- Sending Notification Costing is Complete
- Sending Completed Cost Projections for SSA
- Resetting Service Summary to Working Draft

# Contents

Overview

Setup Service Summary for an Individual

Costing

Send Notification Costing is Complete

Print The Service Summary

Questions

# Print Service Summary

1

2

3

4

# Print Service Summary

Microsoft Dynamics CRM | IMAGINE | Individuals | Create | Little SSAJohn imagine

COPY A LINK | EMAIL A LINK | RUN REPORT | EXPORT TO EXCEL

Active Individuals

Full Name	Date of Birth	DODD#	SSN	Medicaid ID	Assigned SSA	Reporting County	Residence County	Date of Death	Termination Dat...
M Kinne	2/12/1946	9062017	XXX-XX-7778	XXXXXXXX1301		HARR	HARR		
NEHAMIAH VA...	3/24/1946	3126030	XXX-XX-3410	XXXXXXXX1201	SSAHiss Sir	HARR	HARR		
Wincent Kelley-J...	9/22/1947	3270544	XXX-XX-1919	XXXXXXXX6601		HARR	BELM		
NATAYLIA Kokesh	7/25/1956	8508565	XXX-XX-7773	XXXXXXXX5101		HARR	HARR		
Tharrin Dick	11/11/1957	4655672	XXX-XX-8009	XXXXXXXX9201	Little SSAJohn	HARR	HARR		
NICKEITA Guilda	9/17/1959	9189355	XXX-XX-2455	XXXXXXXX0799		HARR	HARR		
William McMan	1/26/1960	4664617	XXX-XX-1087	XXXXXXXX0001		HARR	HARR		

Select an individual and open

Charts

# Print Service Summary

Microsoft Dynamics CRM | IMAGINE | Individuals | Tharrin Dick | Create | Little SSAJohn imagine

RECURRING APPOINTMEN... | PAYOR DETAILS | LEARNING LOGS | ESSENTIAL HEALTH | OUTCOMES | **SERVICE SUMMARIES** | SERVICE LIST

11/11/1957 | XXX-XX-9000 | Little SS

Nick Name		Email	dogfood@dogchow.com
First Name*	Tharrin	Date Of Birth*	11/11/1957
Middle Name	--	Age	57 yrs
Last Name*	Dick	Full Name	Tharrin Dick
Generation	--		

**Phone Information**

Home Phone	--	Home Ext.	--	Mobile Phone	--
Work Phone	--	Work Ext.	--		
Other Phone Type	--	Other Phone	--	Other Ext.	--

# Print Service Summary

Microsoft Dynamics CRM | ISP | Service Summaries | Service Summary -... | Create

SAVE | SAVE & CLOSE | RECALCULATE | PRINT SERVICE SUMMARY...

SERVICE SUMMARY : INFORMATION

Service Summary - 1/1/2015 - 12/31/2015

General

Service Summary

Current As Of: 7/9/2015 | Name: Service Summary - 1/1/2015 - 12/31/2015 - Tharrin Dick | Total Amount: \$1,934.35

Quote ID: SS-01795-C1J9J1 | Revision ID: 0 | Assigned Finance Manager: Little FMJohn

Run Report menu options: Run on Current Record, Individual Service Summary, Individual Service Summar..., Individual Service Summar...

Annotations: 1 (menu icon), 2 (Run Report), 3 (Individual Service Summary), Draft Status, Agreement Status, Completed Status

## Different Status for Service Summary Prints

- Draft -
- Agreement -
- Completed -

# Print Service Summary (Sample)

https://imagine.trnapps.dodd.ohio.gov/crmreports/viewer/viewer.aspx?action=run&context=records&helpID=IndividualServiceSummary.rdl&id=%7bfb238768-e114-e311-1

File Help

Edit Filter

1 of 1 100% Find | Next

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**Harrison County**  
Board of Developmental Disabilities

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Individual: Tharrin Dick      Assigned SSA: Little SSAJohn      As-of-Date:  
DODD#: 4655672      Status Reason: Working Draft

**General**

Quote Information

Name: Service Summary - 1/1/2015 - 12/31/2015 - Tharrin Dick      Revision ID: 0  
Total Amount Per Budget Year: \$1,934.35

Individual Budget Year

Individual Budget Year State: Current	Individual's Budget Start Date: 1/1/2015	Individual's Budget End Date: 12/31/2015
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**Services with Financial Information**

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Service Information

Funding Source Group: LCL	Category: Transportation	Sub-Category: NMT - One-way Trip - Eligible Vehicle
Provider: LICKING CO BD DD	Start Date: 2/1/2015	End Date: 8/1/2015
Units for Planning: 15 minutes	How Often: Weekly	How Much: 100

Item Description:  
Schedule Notes:

Billing Information

100%

# Questions ??