



Definitions and Tips for *imaginels*

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Definitions

CRM: Microsoft Dynamics CRM (customer relationship management). It is the Microsoft platform that the imagine Information System was built on. It is the “side” of the imagine Information System that the County Board will use.

Portal: The Portal was built by DODD. It is a simplified version of the imagine IS and is the “side” the individuals, family members, guardians, and providers will use. It does not have all the functionality as the CRM side.

Dashboard: Your home screen. It is an “at a glance” view of your information. Depending on your role, it will show you the necessary sub-grids, alerts, notifications, and tasks.

Front Page: This is the Individual’s page that you see when you first enter their file.

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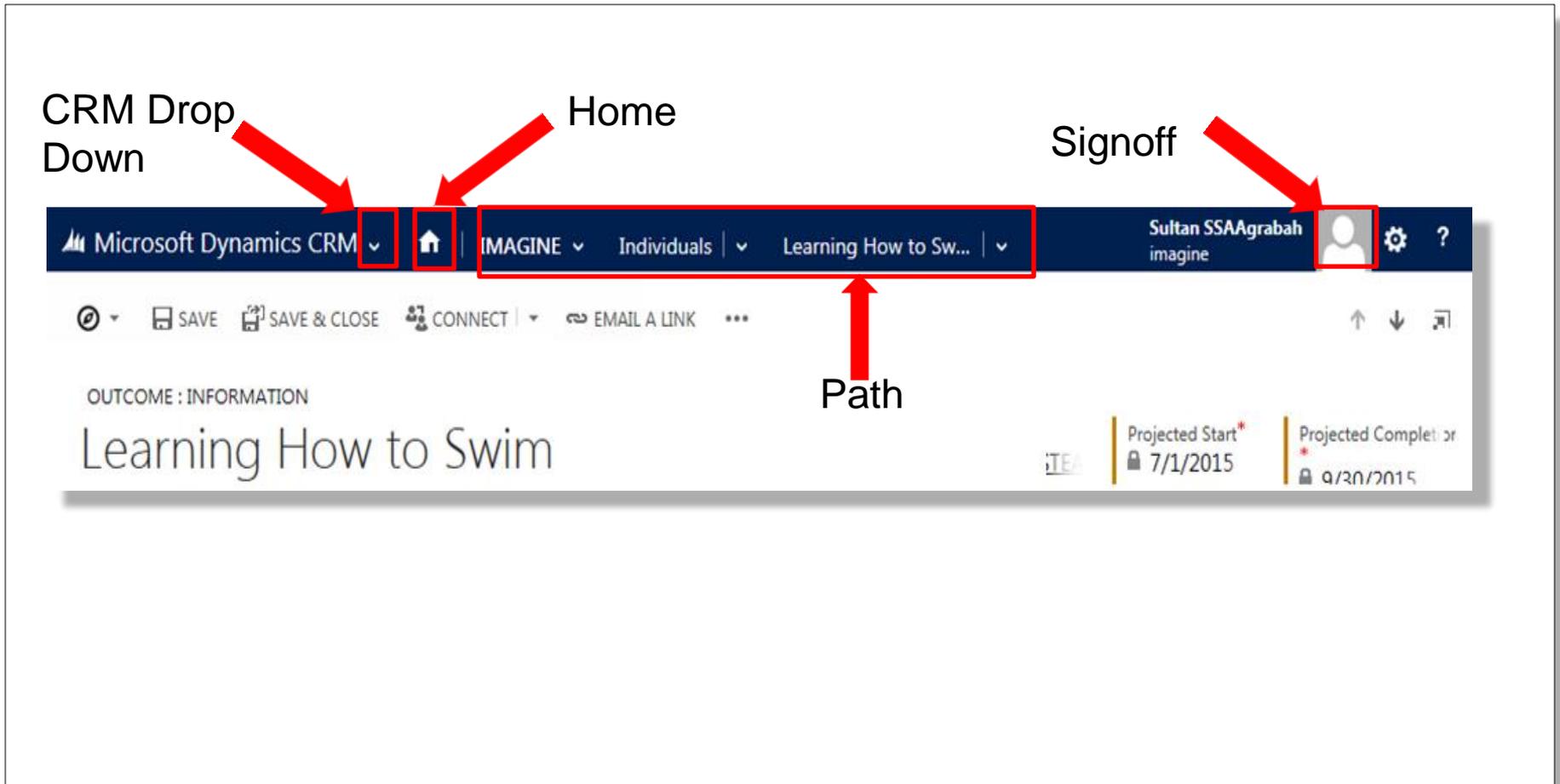
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Navigation Bar

The dark blue bar across the top. This is how you navigate the imagine Information System.



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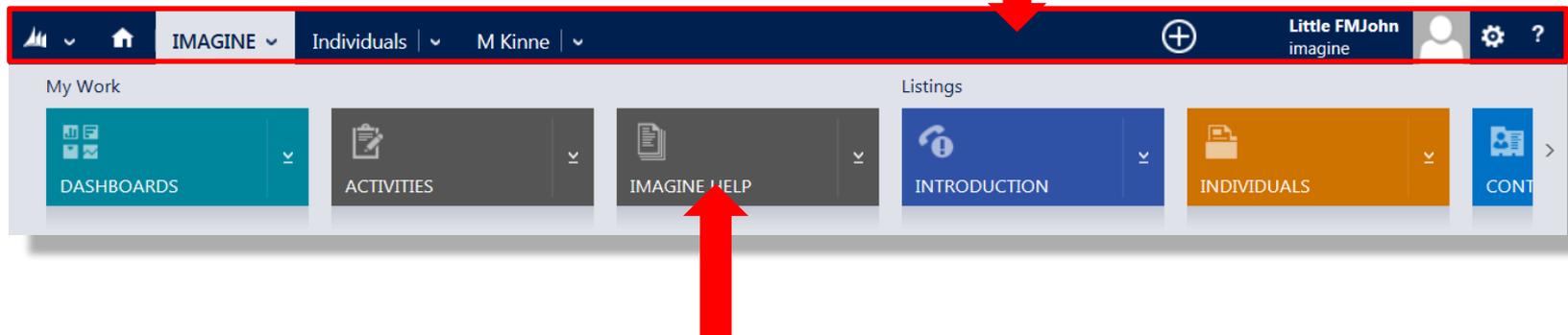
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Tiles

When you click on an arrow in the navigation bar, row of tile will drop down. You click on a tile to go to that section of the system

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.

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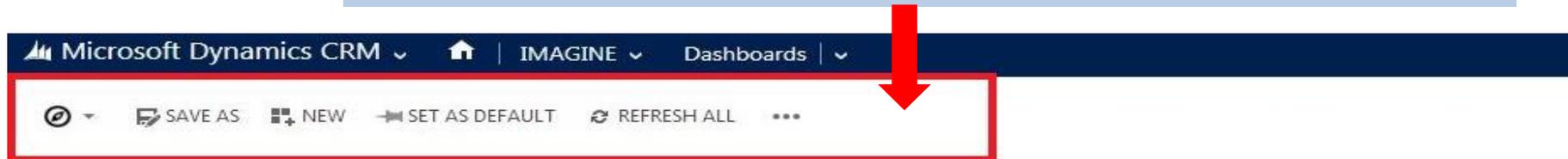
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Ribbon

This is the list of options that are under the navigation bar. The Navigation bar takes you to different section in the system and the ribbon contains you tools to work within that section.



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	XXXXXXXXX7399	Sherry Knox	FAIR	FAIR

Subgrid: Tables of information.

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Tables of information. You can change the views

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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
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Stephan Short	2/28/1993	6671883	XXX-XX-6666	XXXXXXXX2333	Sherry Knox	FAIR	FAIR
Mark Crawford	2/1/1997	6671879	XXX-XX-0987	XXXXXXXX7399	Sherry Knox	FAIR	FAIR
TAnthony Nic...	1/17/2009	6631527	XXX-XX-5569	XXXXXXXX5998	Sherry Knox	FAIR	FAIR
LANNING NA...	3/19/2011	6669318	XXX-XX-8111	XXXXXXXX6199	Sherry Knox	FAIR	FAIR

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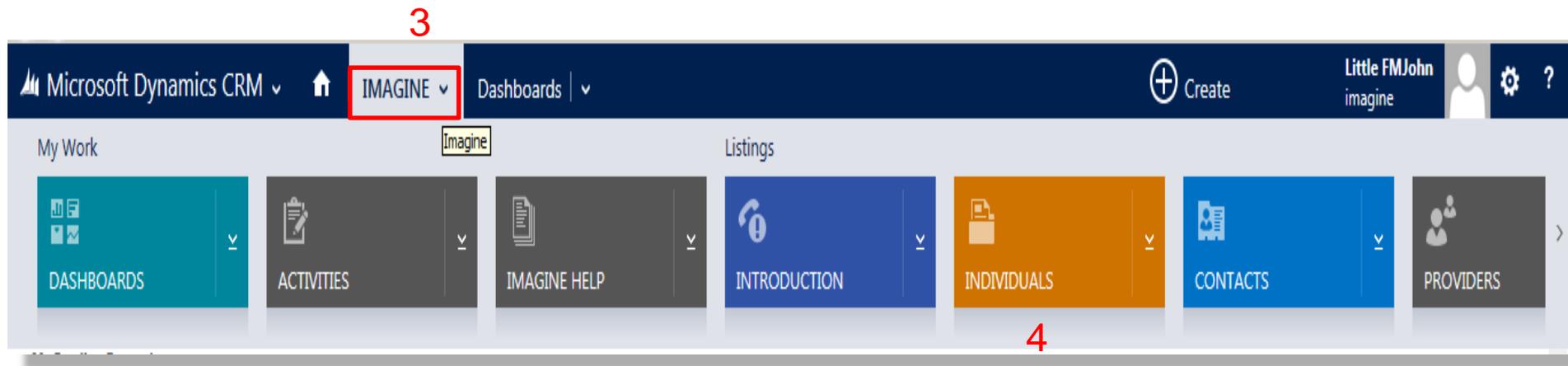
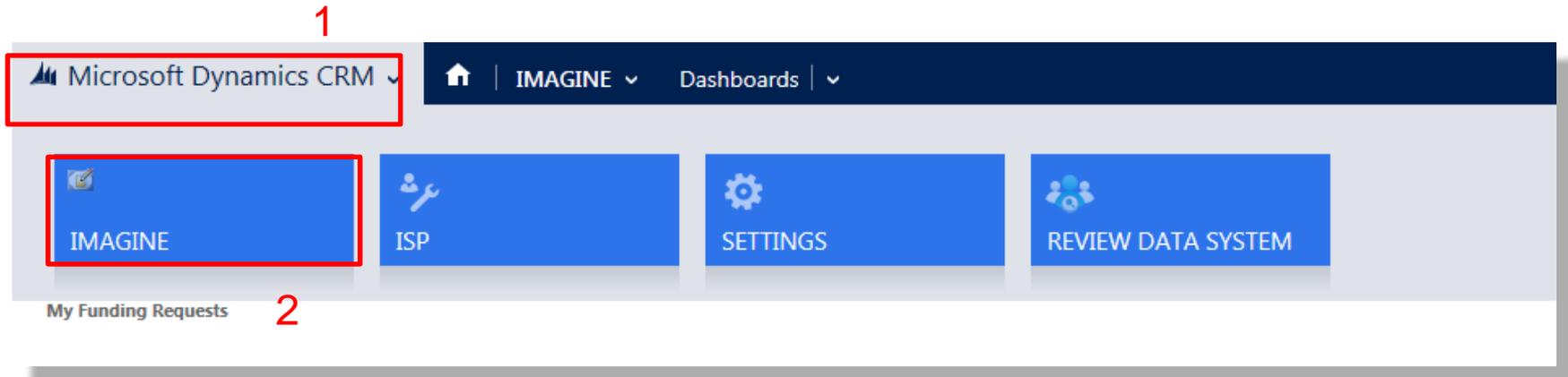
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Navigating to different Dashboards



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imagineIS 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.

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