Ohio | Department of Developmental Disabilities

imagine Information System (IS)
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imagineIS
Implementation and Change Management Project

Service Support Administrator Supervisor Guide

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Setting Direct Reports

The SSA supervisor has the ability to assign or re-assign to themselves, direct reports.

1. Sign in to ***imagineIS*** as SSA Supervisor
2. Click on the Microsoft Dynamics icon in the navigation bar
3. Click on the Settings Tile

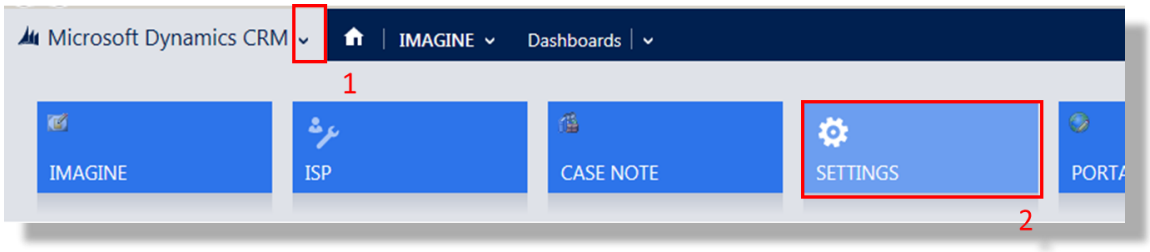

Figure 1 – Initial Menu Settings

4. Select the SETTINGS drop down in the blue ribbon
5. Click on the ADMINISTRATION Tile
6. Click on the Users Link

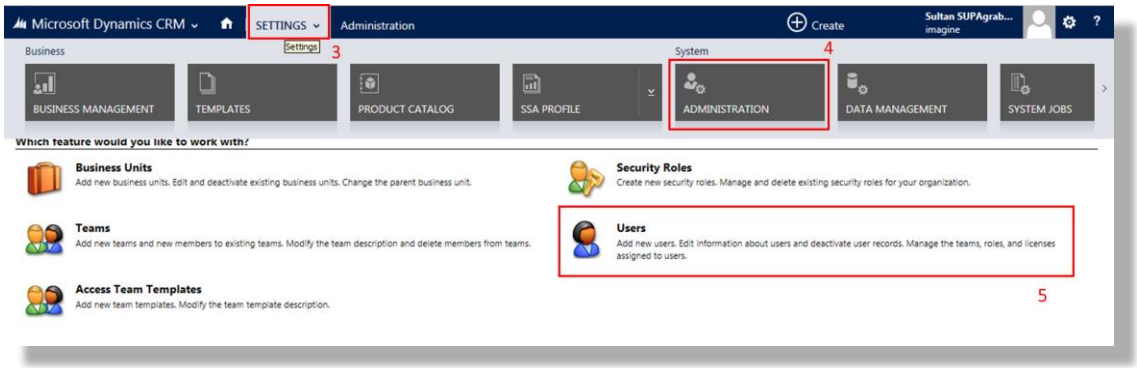

Figure 2 – Select User

7. Enter the User Name of the SSA in the search field unless already displayed in the list
8. Click the name of the SSA to open the record

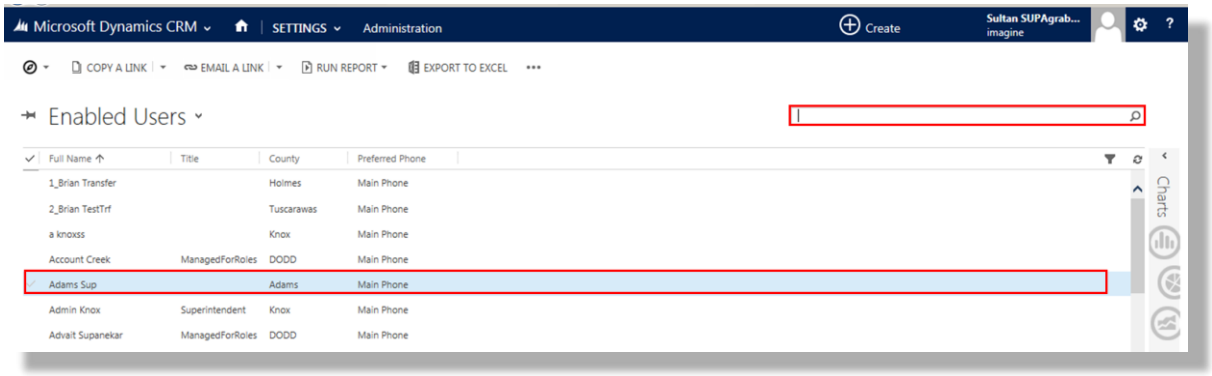

Figure 3 – Select SSA

9. Click the CHANGE MANAGER link

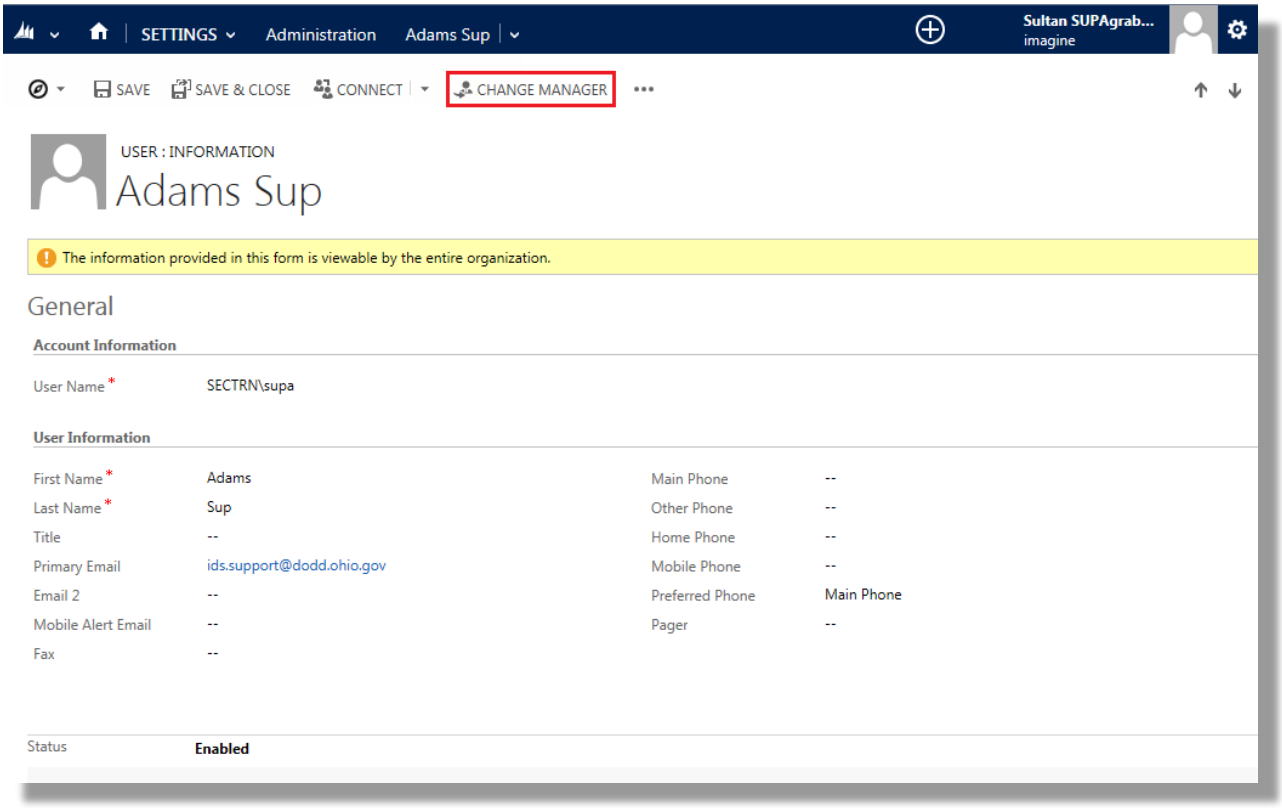

Figure 4 – User Information Page

10. Type an SSA Supervisor name or search for it
11. After the SSA Supervisor Name is found, Click OK
12. Click Save and Close

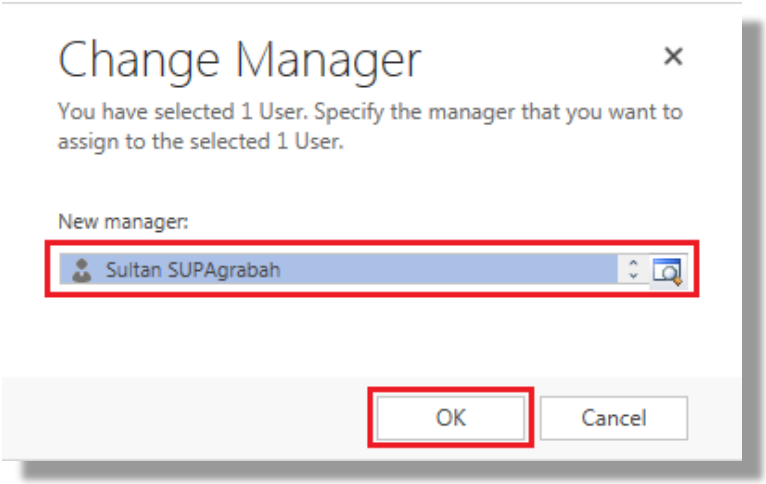

Figure 5 – Change Manage Approval Screen

Assigning and Reassigning an Individual to an SSA

Walks though how to assign or reassign an SSA to an Individual.

1. Sign on to ***imagineIS*** as an SSA Supervisor
2. Change the Dashboard to 'SSA Supervisor/Director Caseload' (If not already set)

3. Scroll down and select from any of the Individual Sub-Tables.

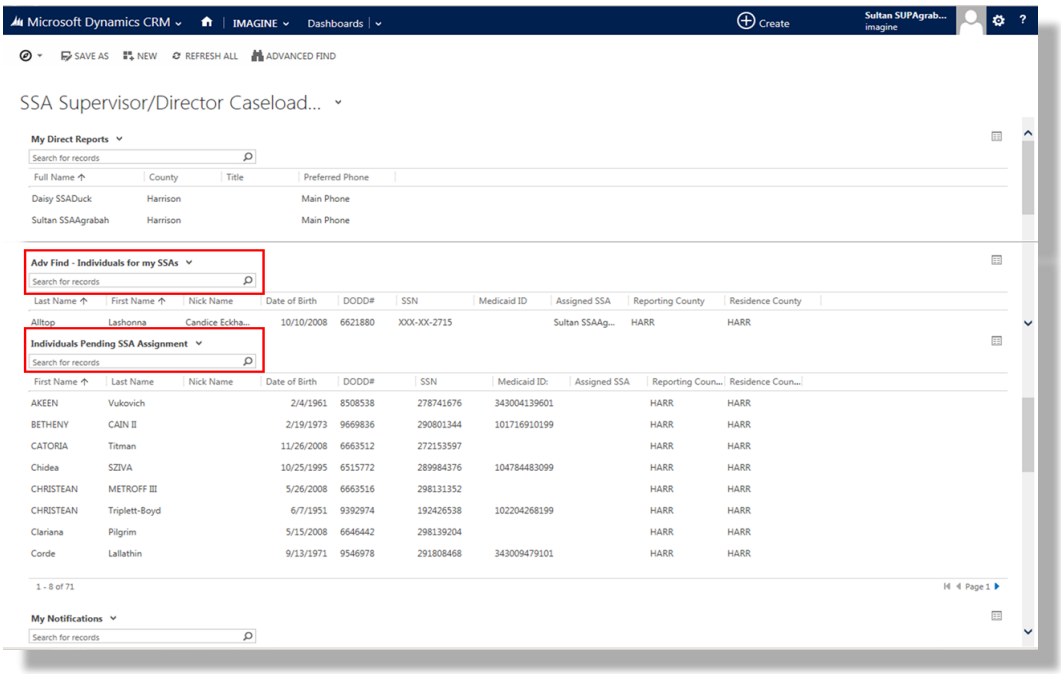

Figure 6 – Assigning an individual to an SSA - Part 1

4. Search for the Individual and click to open the record
5. Scroll Down to the County Information

6. Click the 'Search' for the Assigned SSA

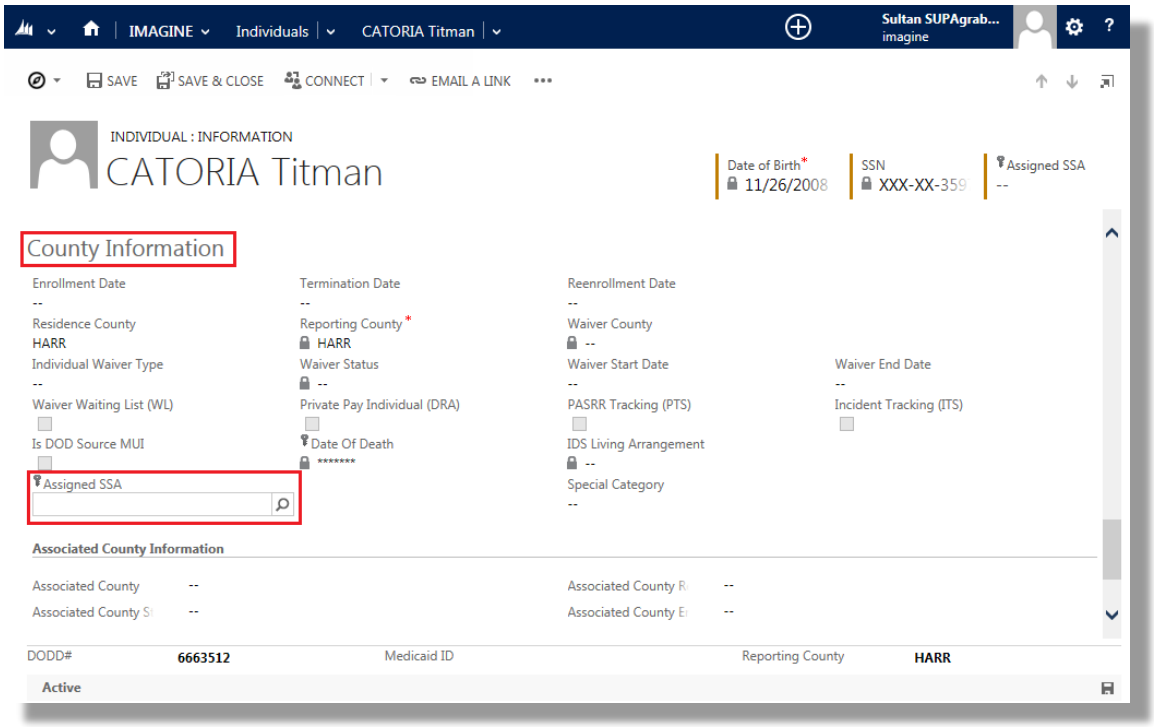

Figure 7 – Assigning an Individual to an SSA - Part 2

7. Scroll through the list to find the SSAs or use the Search functionality
8. When the SSA is located, highlight and click the SSA
9. The name will appear as the assigned SSA

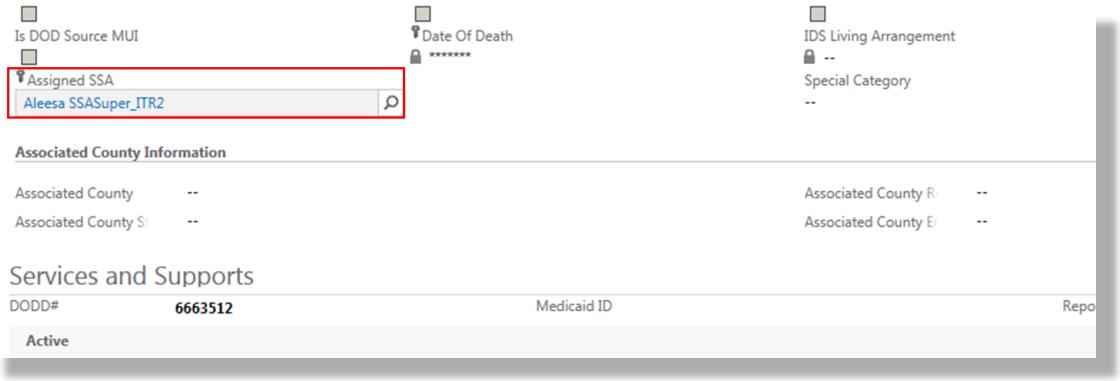

Figure 8 – Assigning an Individual to an SSA - Part 3

10. Click Save and Close

Setting Supervisor Notifications and Review

An SSA can have their profile set to send a notification or request review by the SSA Supervisor each time any of seven modules are phased. This allows the SSA supervisor to monitor the work of their direct reports. This process is also used to remove review settings for a direct report.

1. Sign on to ***imagineIS*** as an SSA Supervisor
2. Change the Dashboard to SSA Supervisor/Director Caseload (If not already set)
3. Search for the SSAs list in My Direct Reports.
    a. If there are no SSAs listed in 'My Direct Reports', go to 'Setting Direct Report' step above

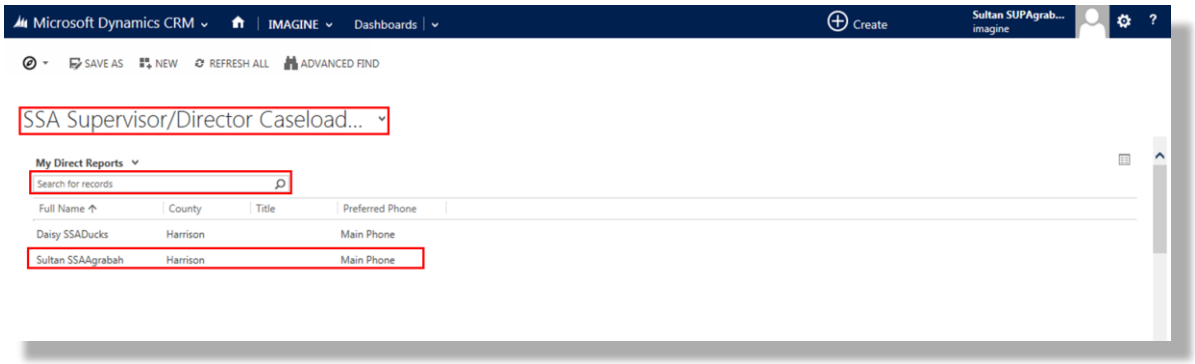

Figure 9 – Opening a Direct Report Record

4. Click on the direct reports Name to open the record
5. Click the down arrow on the blue ribbon next to the SSA's name to display the tiles
6. Scroll right to 'SUPERVISOR REVIEW SETTINGS' Tile and select

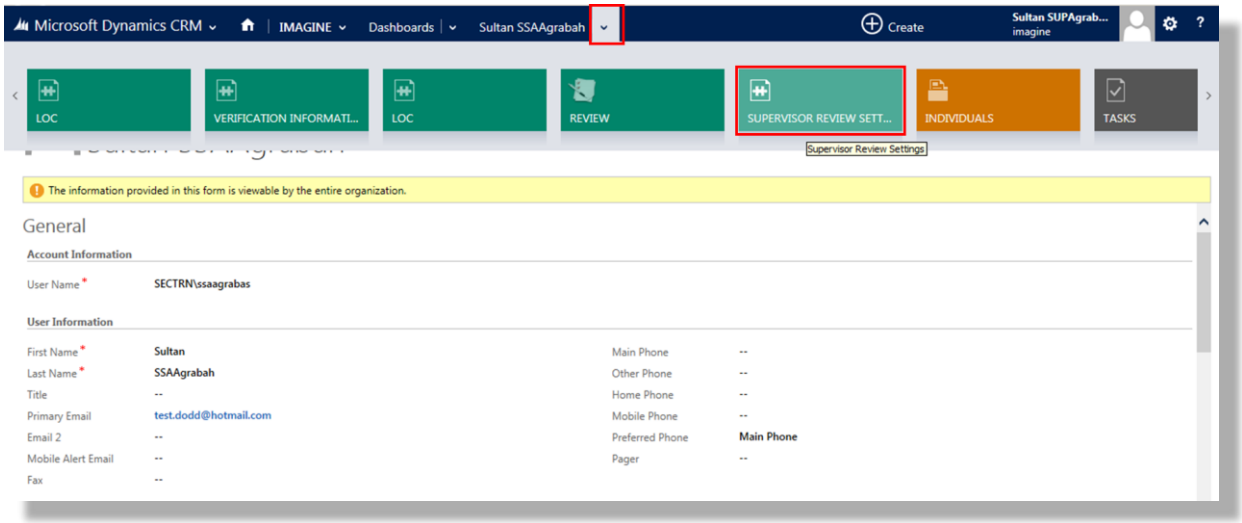

Figure 10 – Supervisory Settings

7. Select 'ADD NEW SUPERVISOR REVIEW SETTING'

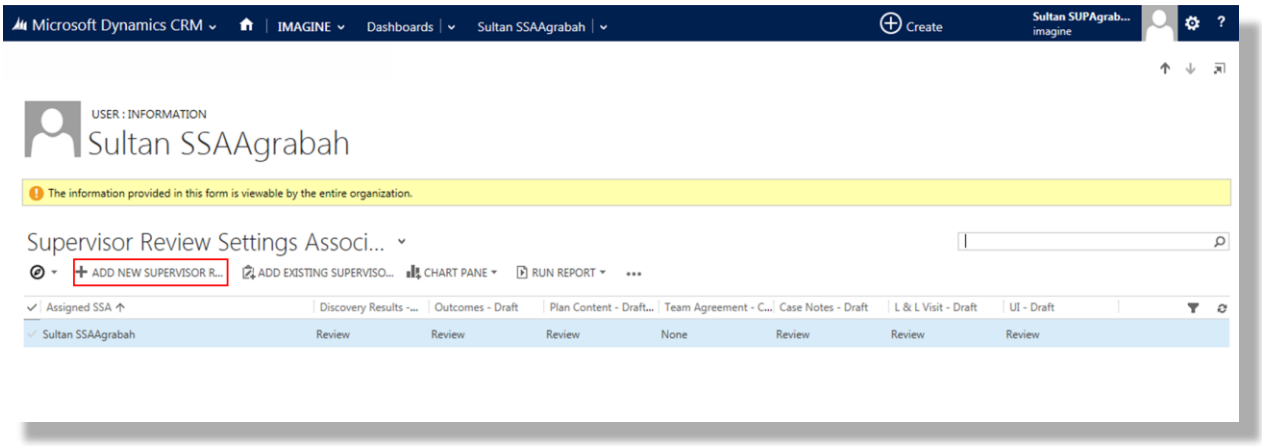

Figure 11 – Adding New Supervisor Settings - Part 1

8. Select the review setting for the supervisor.

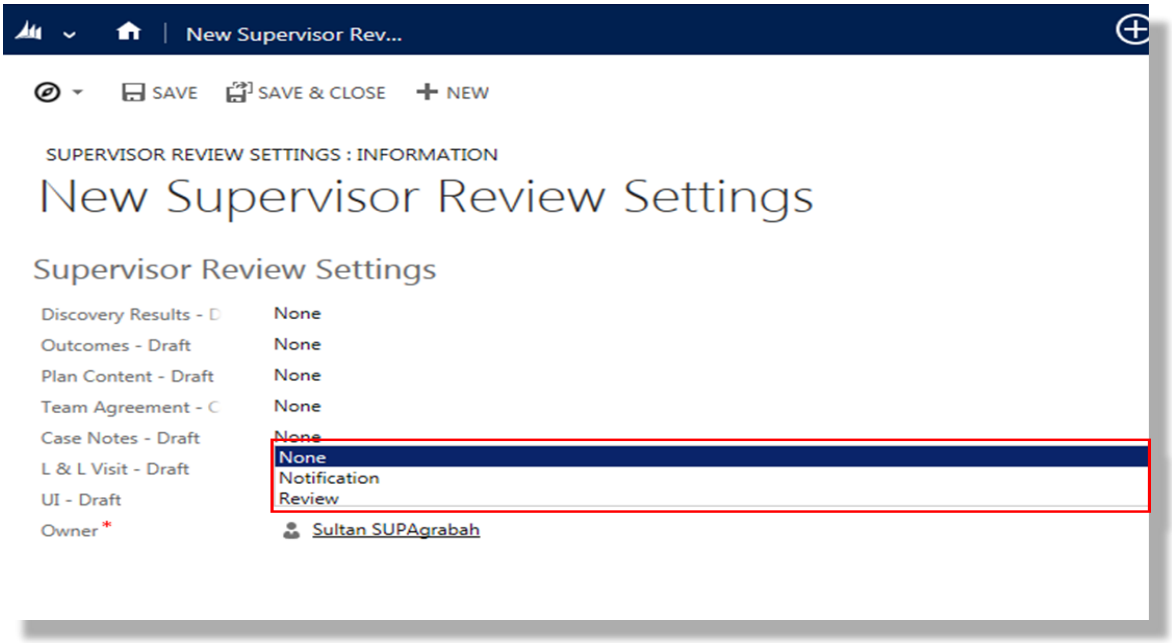

Figure 12 – Adding New Supervisor Settings - Part 2

9. Click Save and Close

Reviewing Quick Summary Modules for an individual

The Quick Summary Modules provide the SSA Supervisor a convenient way to review the status of the Individual's Discovery Management process.

1. Sign on to ***imagineIS*** as an SSA Supervisor
2. Click on the IMAGINE drop down
3. Click on the 'INDIVIDUALS' Tile to open
4. Double click on the individual to open up the record

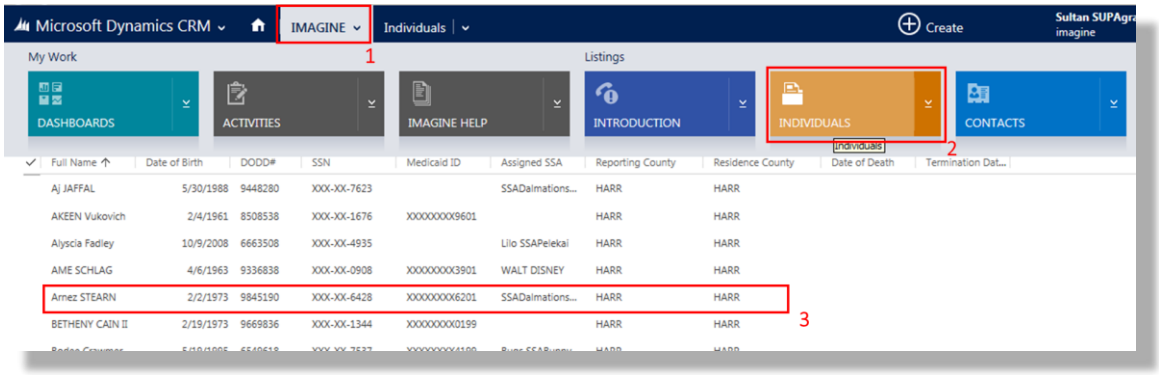

Figure 13 – Individual Listing

5. Scroll down and click on one of the Quick Summary listings:
   a. Discovery Quick Summary
   b. Individual Quick Summary

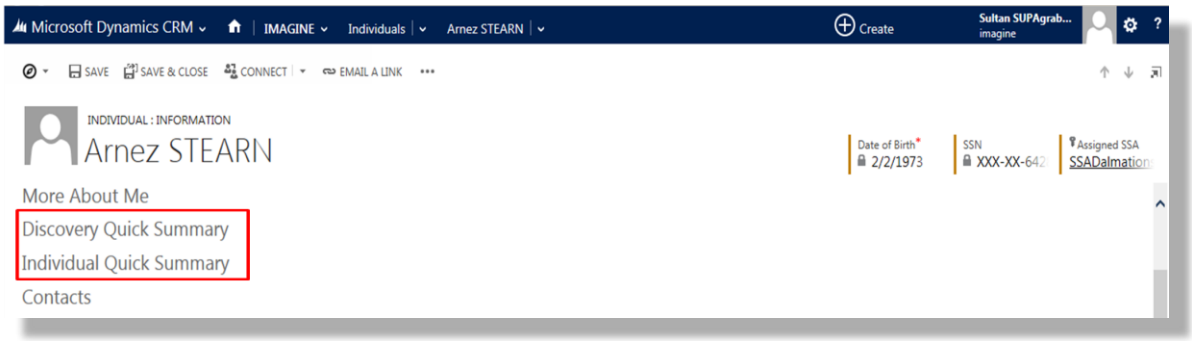

Figure 14 – Individual Quick Summaries

Discovery Quick Summary

1 of 1 100% Find | Next

Discovery Results	Explored Module?	Existing Supports	Support Requested?	Last Edited Date
Communication & Learning	Y	Natural Supports Engaged	Yes	06/17/15
Community Membership	N		No	04/08/15
Day to Day Life	Y	Natural Supports Engaged	Yes	06/16/15
Employment	N		No	04/08/15
Finance	N		No	04/08/15
Getting Around	N		No	04/08/15
Health & Wellness	N		No	04/08/15
Home & Housing	N		No	04/08/15
Relationships	N		No	04/08/15

Discovery Quick Sur* 4/8/2015

Figure 15 – Discovery Quick Summary Sample

Note Quick Summaries will only display data after Discovery results have been published.*

1 of 1 100% Find | Next

QUICK SUMMARY: Important To / Important For

Discovered In	Important To	Important For
Communication & Learning	• Important to the Testing of the system	• To prove that it works and I get it
Community Membership		
Day to Day Life	• This is something that the individual will need in order for them to be able to live sucessfully	• This is something that the individual desires in order for them to be able to live sucessfully
Employment		
Finance		
Getting Around		
Health & Wellness		
Home & Housing		
Relationships		

Figure 16 – Individual Quick Summary Sample

Reviewing or Advancing (Activating) an Outcome (With Supervisor Review On)

Prior to executing a plan for an Outcome, the Outcome must be reviewed by all parties and phased through the required step to be activated. This section walks through how to advance the Outcome to an active status.

1. Sign on to ***imagineIS*** as an SSA Supervisor
2. Change the Dashboard to SSA Supervisor/Director Caseload (If not already set)
3. Scroll down the page to 'My Alerts'
4. Click the 'Outcome Review Required' entry

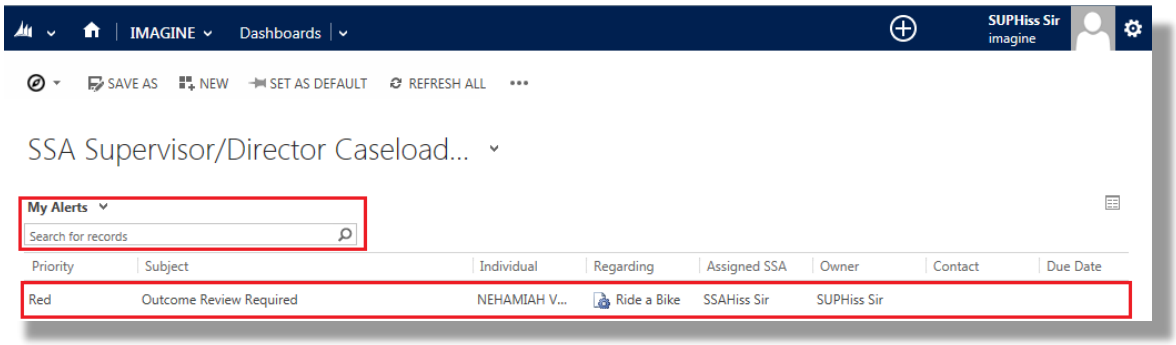

Figure 17 – Outcome Review

5. Click the 'Regarding' link to open the Outcome to review

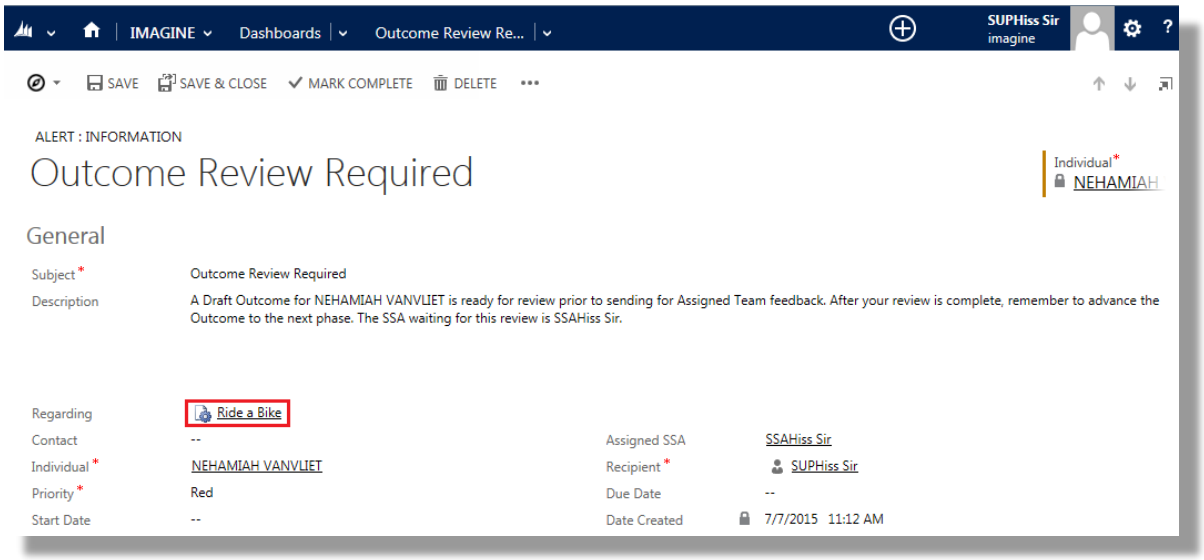

Figure 18 – Alert Information: Regarding

a. Once the Outcome displays, the Supervisor can scroll through the Outcome as desired
b. Click the title lines to expand and review

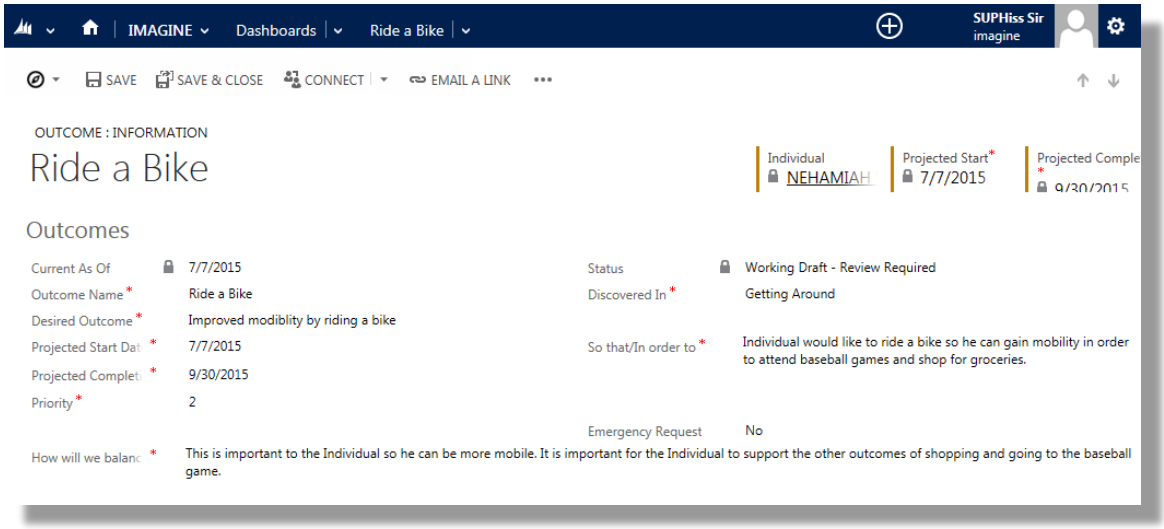

Figure 19 – Outcome Information

NOTE: Once the review is complete the SSA Supervisor has two choices; move the Outcome to the next Phase allowing the process to continue or returning the Outcome to the SSA for further refinement.

6. To move the Outcome to the next phase click the 'More Commands' ellipsis (…) then click 'Next Phase'. Two confirmation alters will be displayed. Accept the notices by clicking 'OK'. The Outcome is moved to 'Draft Distributed'. The Outcome is now visible to all members of the Team.
7. To return the Outcome to the SSA for further refinement reset the Outcome to 'Working Draft – Internal' by clicking the 'More Commands' ellipsis (…) then clicking 'Reset to Internal'.

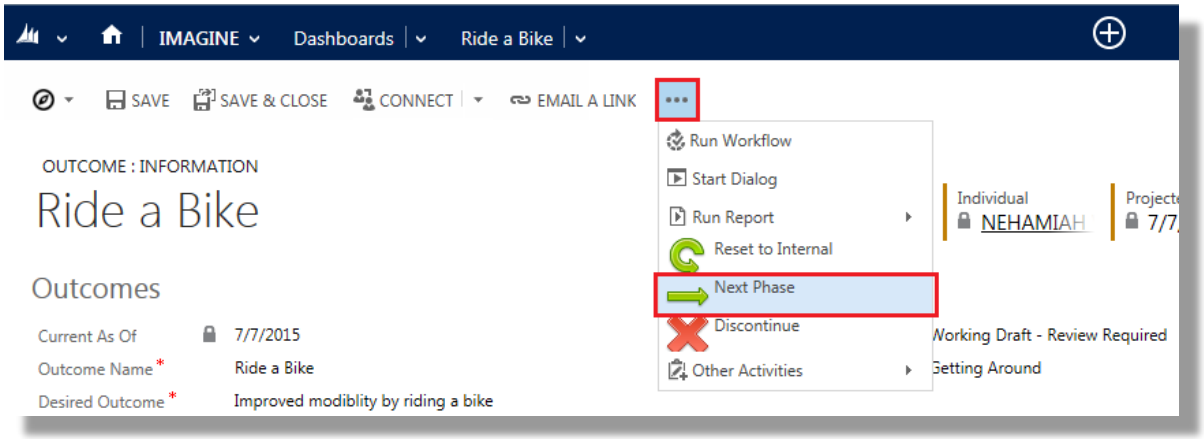

Figure 20 – Outcome Page: Phasing

8. To 'Activate' the Outcome click the 'More Commands' ellipsis (…) then click 'Activate'

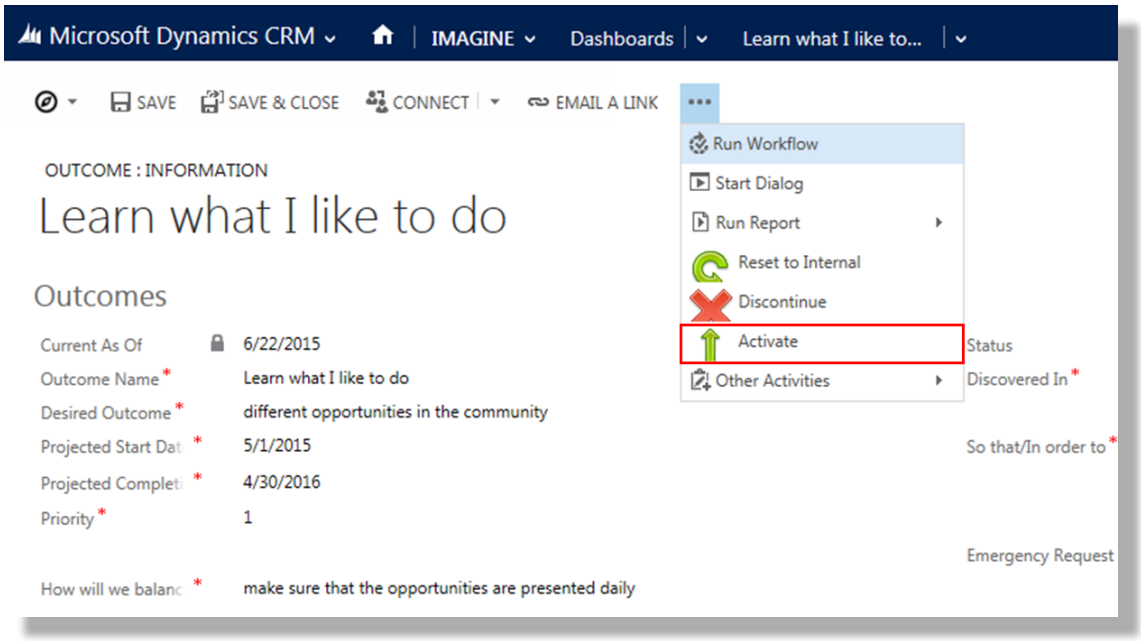

Figure 21 – Activate an Outcome

9. Click OK
10. Once the review process is complete the Alert will need to be marked completed. Click the 'Mark Complete' option on the Alert screen to close and removes the alert from the 'Alerts' list on the 'SSA Supervisor/Direct Caseload' dashboard.

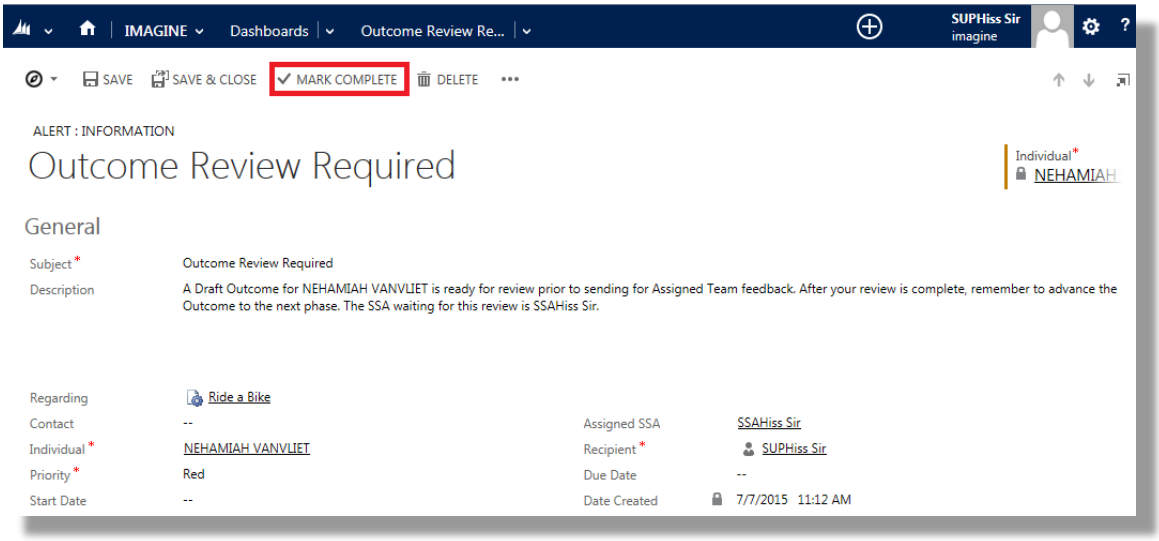

Figure 22 – Alert Information: Mark Complete

Reviewing ISP for an individual (With Supervisor Review On)

If the SSA Supervisor requests to review the ISP, (See the section on Setting Supervisor Review), the section below steps through where to find the ISP on the Supervisor Dashboard and how to mark the alert as complete.

1. Sign on to ***imagineIS*** as an SSA Supervisor
2. Change the Dashboard to SSA Supervisor/Director Caseload (If not already set)
3. Scroll down the page to 'My Alerts'

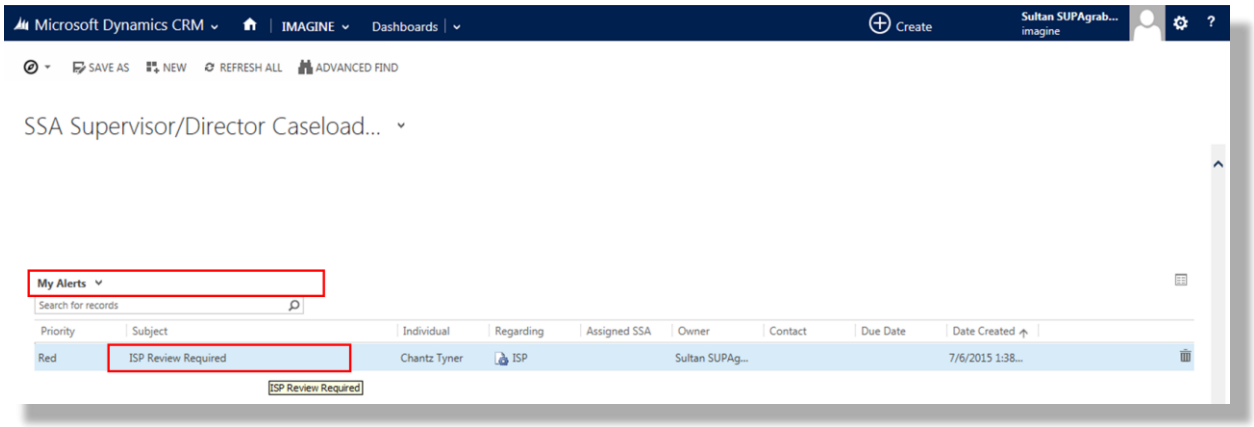

Figure 23 – ISP Review Required

4. Double click the 'ISP Review Required' alert item to open the ISP
5. In the Alert, click the 'Regarding' item to open the ISP to review

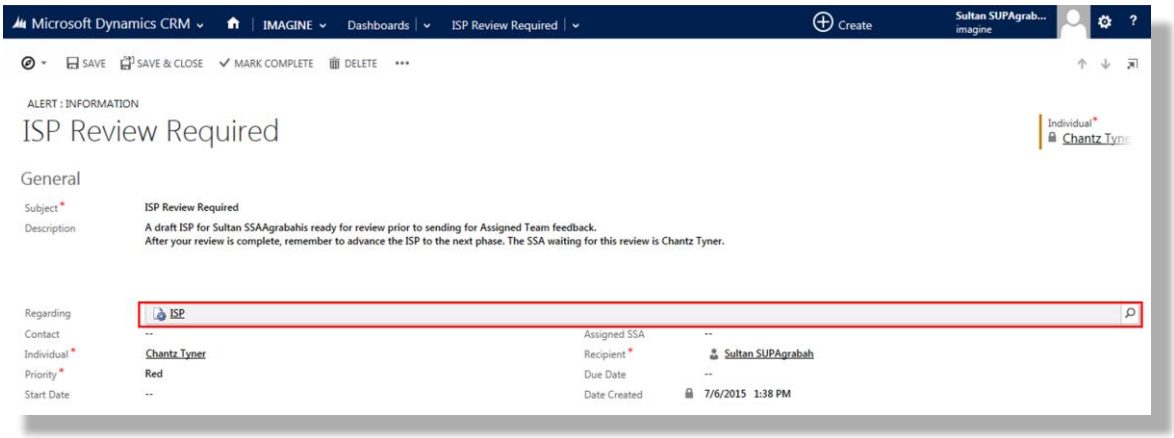

Figure 24 – Alert Information: ISP Review Required

6. When ISP opens, the supervisor can:
   a. Review or update
   b. Respond or provide feedback
   c. Advance to the next phase
7. To Advance to the next phase, click more commands (…) and select Next Phase

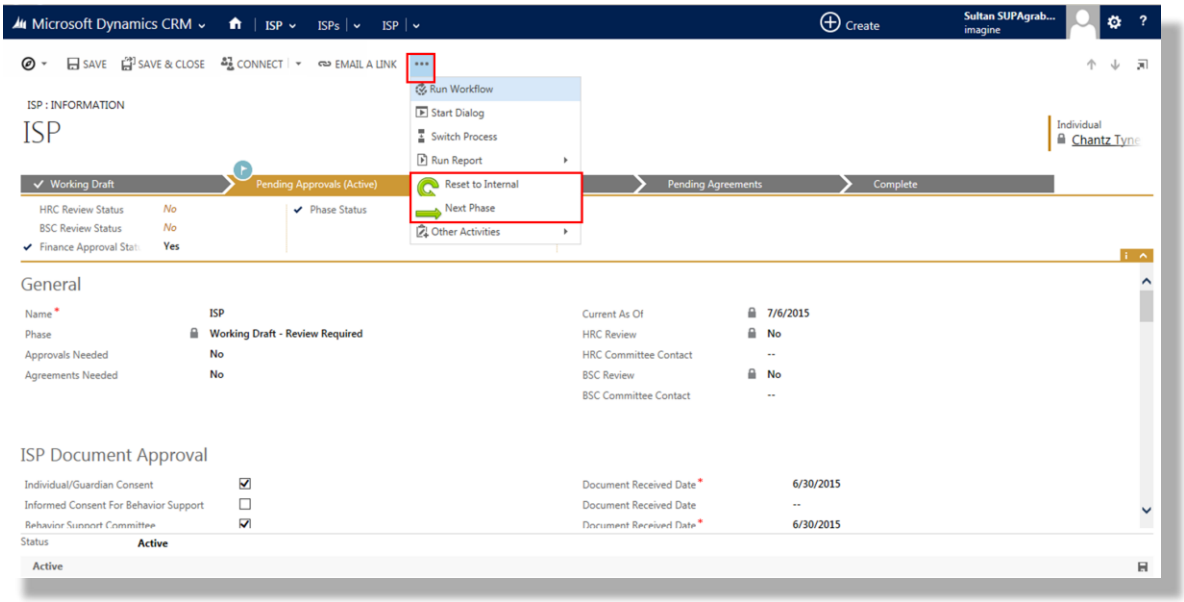

Figure 25 – Advancing the Phase

8. Click OK to each of the confirmation widows that display

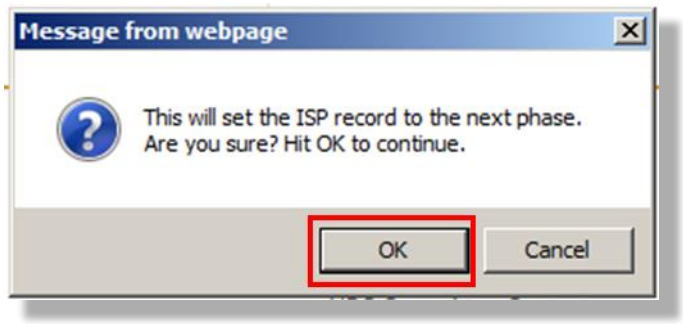

Figure 26 – ISP Confirmation

9. Select 'Mark Complete' to close the Alert

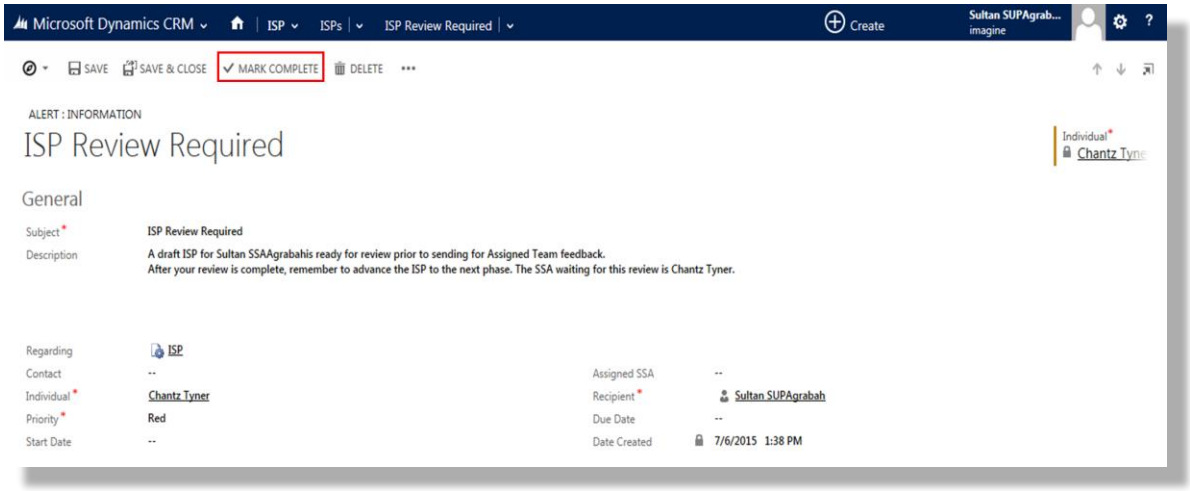

Figure 27 – Marking an Alert Complete

Note: The SSA Supervisor will be notified if the ISP has been set to 'Review' status. The 'Review' setting requires the SSA Supervisor to move (action) the ISP to the next phase. If the setting were set to 'Notify' or 'None', then the SSA actions the ISP to the next phase.

Validate User Security Roles

The below is for reviewing user security roles with in the ***imagineIS*** system.

1. Sign on to ***imagineIS*** as an SSA Supervisor
2. Click the CRM drop down
3. Click the 'SETTING' Tile

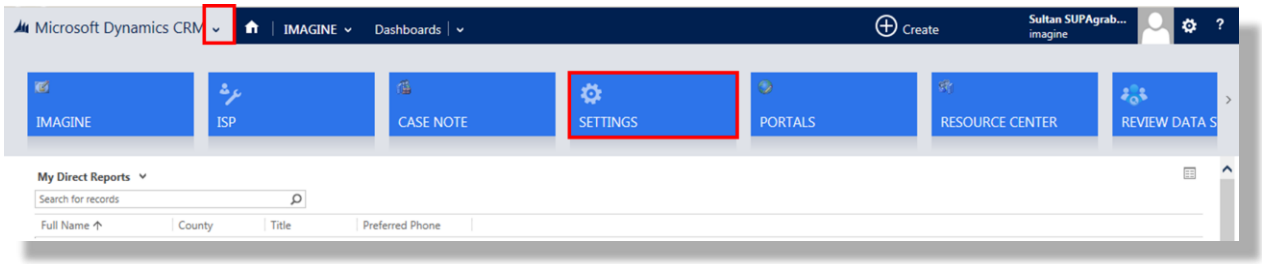

Figure 28 – Initial Menu Settings

4. Select the 'SETTINGS' drop down
5. Click on the 'ADMINISTRATION' Tile
6. Click Users

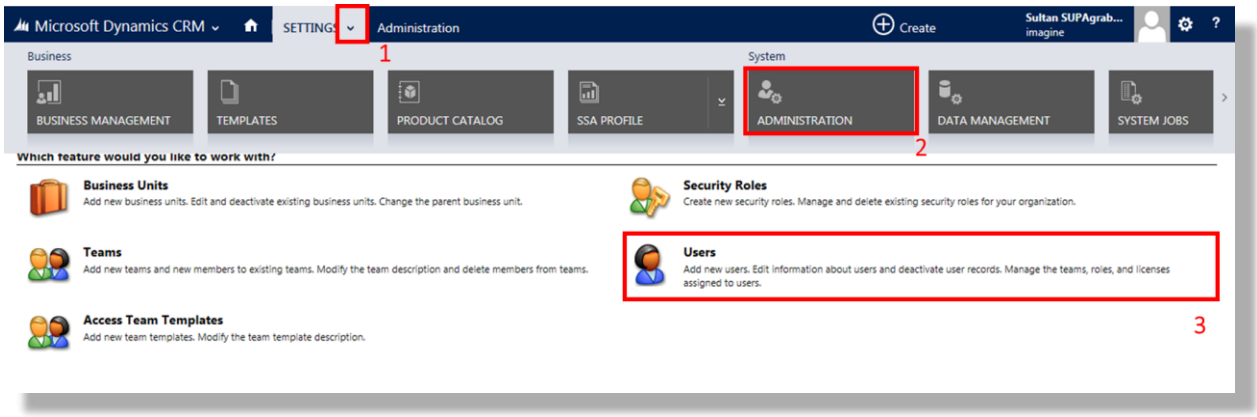

Figure 29 – Validate User Security Roles – Part 1

7. Type the user name in the search window and select Enter
8. Double Click the user to open
9. Click the drop down next to the users name
10. Click the 'SECURITY ROLES' Tile
11. Click on the security role to display the assigned security

12. Click the tabs to reveal the security roles underneath

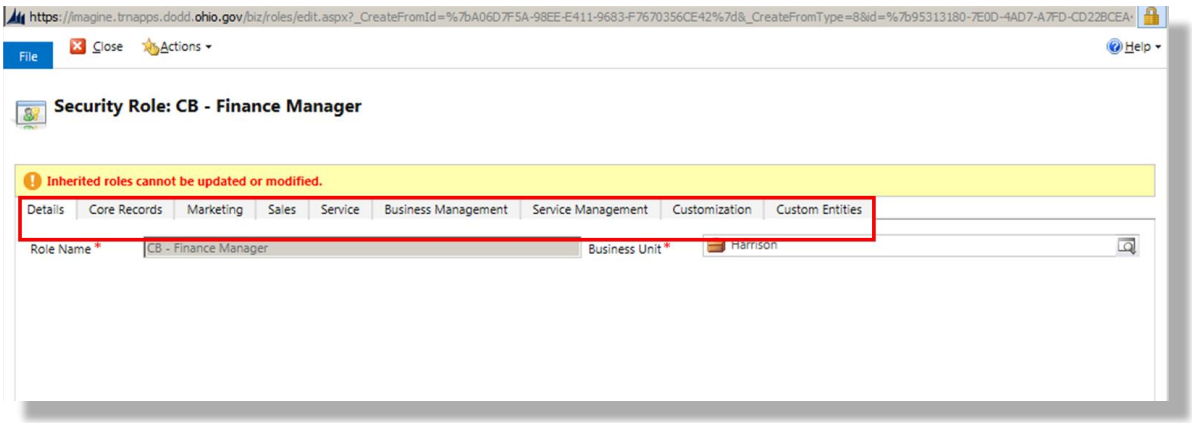

Figure 30 – Validate User Security Roles – Part 2

Assign Additional CRM Roles to Users

To assign multiple CRM roles to a single user, such assigning the Budget Support Specialist role to the Finance Manager, follow the instruction below.

1. Sign on to ***imagineIS*** as an SSA Supervisor
2. Click on the CRM drop down
3. Click the 'SETTINGS' drop down
4. Click the 'SETTINGS' Tile

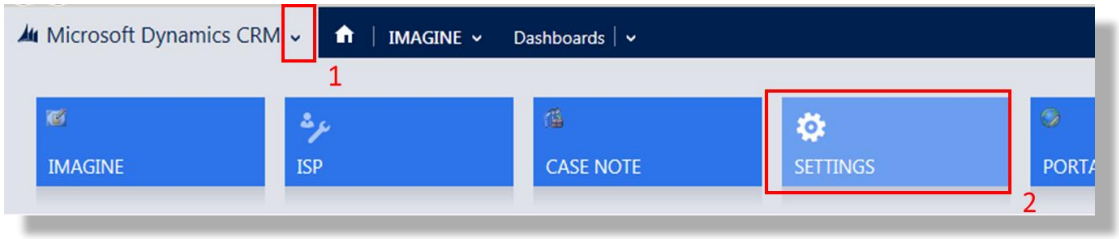

Figure 31 – Settings for User Groups

5. Click the Users link

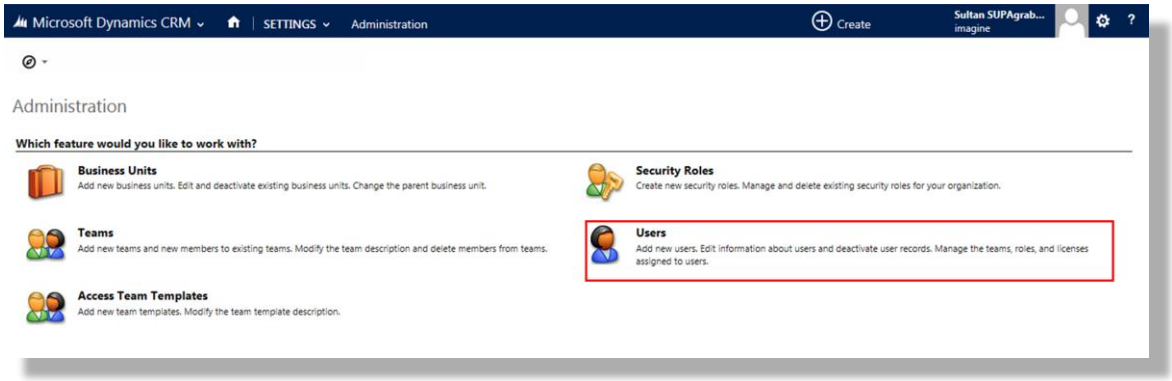

Figure 32 – Select User Link

6. Search/Select the users

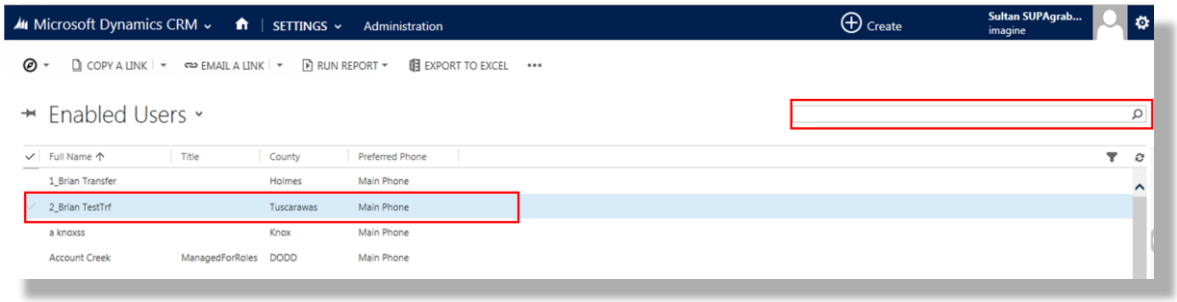

Figure 33 – Search and Select User

7. Scroll down to 'User Titles'
8. Click the roles that apply
9. Click Save
10. Click Save and Close

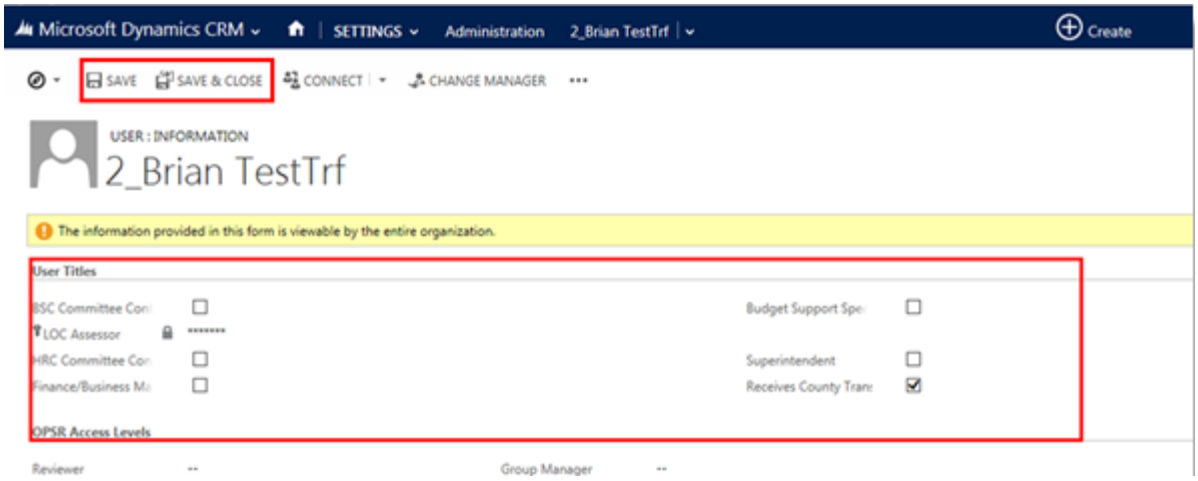

Figure 34 – Assign Users to Search Group

Add a SSN, Medicaid Number or update DOB for an Individual

This section explains how to update Date of Birth, Medicaid Number, and Social Security Number for an Individual.

1. Sign on to ***imagineIS*** as an SSA Supervisor
2. Change the Dashboard to SSA Supervisor/Director Caseload (If not already set)
3. Scroll down and click on a user from any of the Individual Sub-Tables.

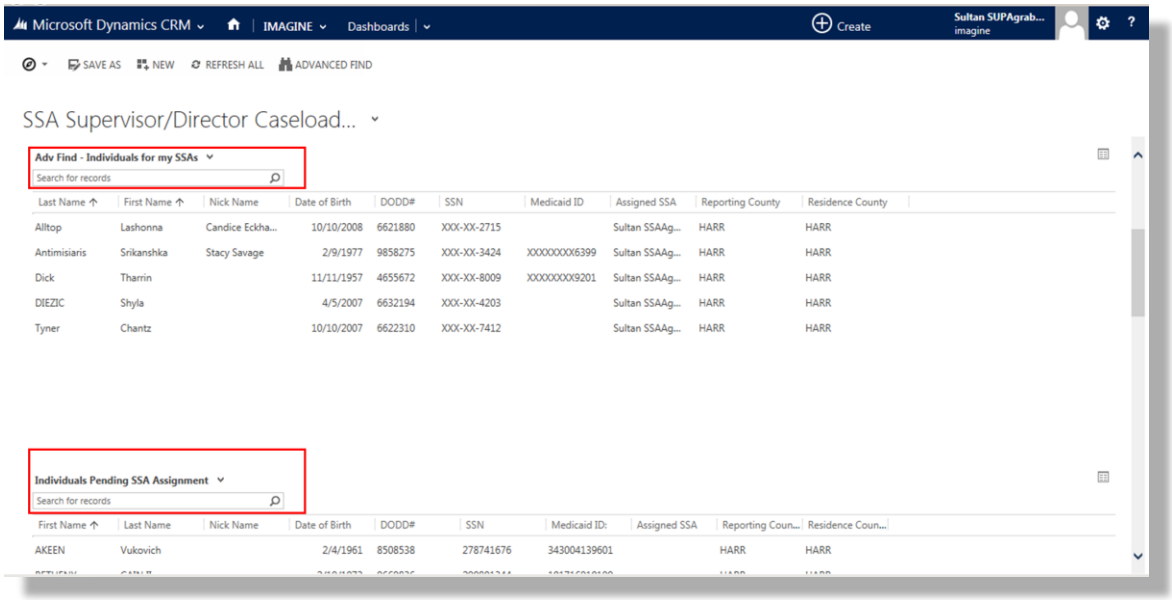

Figure 35 – Sub-tables of Individuals

4. DOB is a the top of the screen, click to make a change

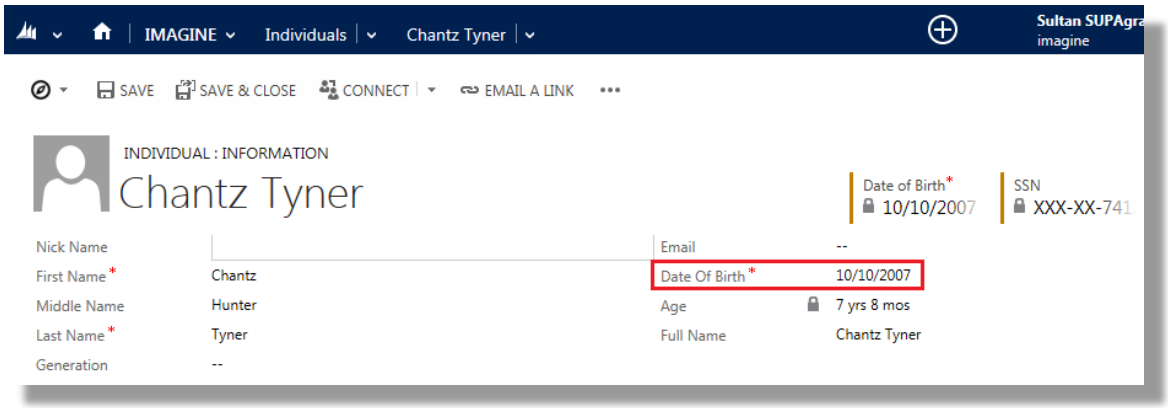

Figure 36 – Individual Information: Date of Birth

5. Scroll down the page to the Additional Demographics (Click to open and see the details)
6. Click on the SSN or Medicaid Number field to make a change

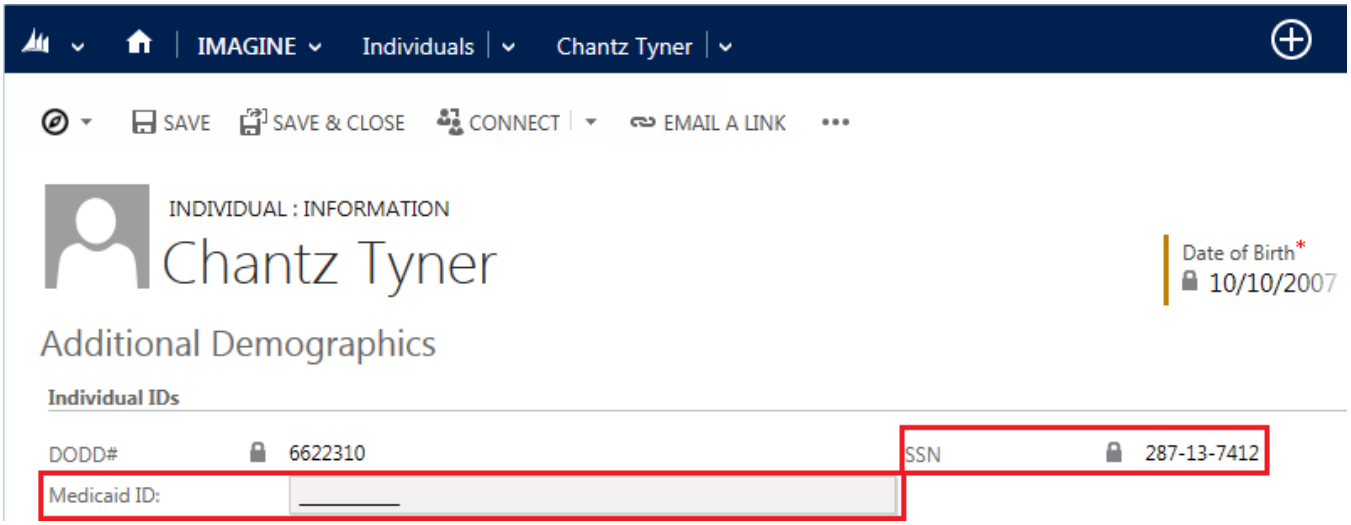

Figure 37 – Update/Review DOB, Medicaid, & SSN for an Individual

7. Click Save and Close

Note: A Supervisor can only add a new SSN or Medicaid number. To update/change these fields requires a DODD Systems Administrator.

Change the Name of an SSA

1. Sign on to ***imagineIS*** as an SSA Supervisor
2. Change the Dashboard to SSA Supervisor/Director Caseload (If not already set)
3. Under 'My Direct Report' sub-menu, Search for or Click on the Direct Report's name

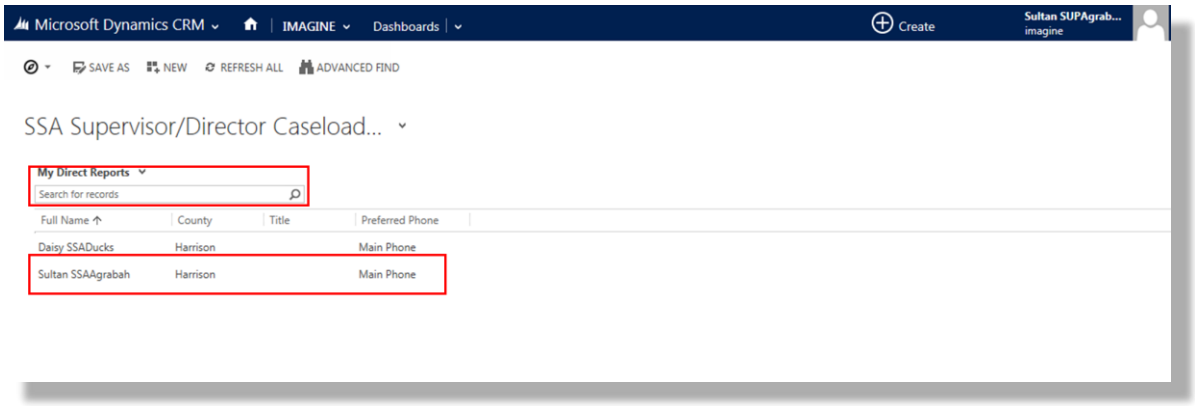

Figure 38 – Find Direct Report

4. Click on the first or last name and then change it
5. Select Save and Close

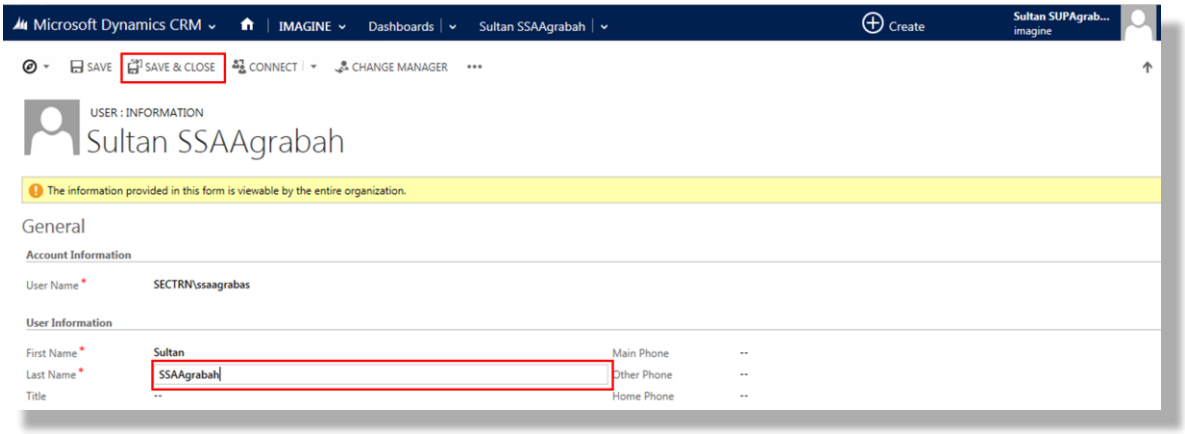

Figure 39 – Change Name of Direct Report